

Merrickville & District Historical Society



Operational Strategy Research
Merrickville, Ontario

Version 1.0
16 September 2022
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EXECUTIVE SUMMARY

The Merrickville and District Historical Society (MDHS or “the Society”) has engaged Social Delta to provide research and stakeholder input to help inform their future strategic goals and options.

This report offers Eleven concrete recommendations to the MDHS Board to inform future operational and planning efforts based upon both the practices, programs and structures of other organizations operation museums or historic sites across Eastern Ontario and the feedback from more than 73 stakeholders.

The following pages document significant (though not exhaustive) research on competitors, potential collaborators and current factors affecting the work of the MDHS, including price points, funding sources and design of comparable services and the strengths/weaknesses of their business execution. Some of the best practices of similar historical societies or cultural organizations in Canada have been highlighted.

With the ongoing threat of COVID, a community stakeholder consultation was done through an online survey which asked a series of 15 questions on three main themes:

1. The perceived and expected role of the MDHS in the protection and preservation of historical buildings and artifacts,
2. Ideas to help inform the activities and programs of the Society to maximize their mission impact, and,
3. Possible sources of funds and partners to support the future work of the Society.

The research led to eleven (11) recommendations, as follows:

1. Continue to Engage the Village Council of Merrickville-Wolford
2. Build Stronger Ties With Other Local Organizations
3. Launch a Proper Fundraising Program
4. Create an Annual Festival
5. Broaden the Historical Preservation Role
6. Look for a Long-Term Home for the Society
7. Actively Engage Youth
8. Update the Blockhouse Museum
9. Try Theatrical Endeavors
10. Create a Modest Retail Operation
11. Invest in Marketing and Promotions

The findings of these research indicates that there are many specific opportunities that can be explored by the MDHS. There is no need to change the structure of the organization, as its registered non-profit status affords it a strong governance structure, the ability to generate both

earned and donated revenue, and to maintain a close relationship with the people of Merrickville-Wolford.

The positive responses and input from the many stakeholders of the organization indicate that the Society is working to protect valuable stories, artifacts, build heritage and the commercial interests of the region. It will be important to focus the efforts of the future work of the Society to engage new audiences, to recruit more volunteers (especially from different stakeholder groups including local government, business owners, First Nations and youth), to broaden the offerings of the Society and to effectively promote the existing and new value that the Society brings to the economic, social and cultural life of both local citizens and visitors.

The costs of the recommendations are largely expressed in time, although where there are material costs, there are several elements of the recommendations that propose modest new sources of revenue, from the Village Council, from foundations, from individual donors and from local or regional sponsors.

Social Delta believes that the greatest threat to the MDHS may well be obscurity. Current work running the Blockhouse Museum, curating the archives, offering local events and managing the volunteers and members of the Society is done well, but too few know about it. The senior volunteers are achieving great results, but they need to broaden their engagement with other members and organizations in the community. This broader engagement will make it possible to create new, interesting, contemporary activities and programs which will serve two purposes: generate renewed interest in the important work of documenting, preserving, celebration and creating local history, while simultaneously ensuring that the Merrickville and District Historical Society creates greater financial resilience to remain a vibrant and effective contributor to the community they serve.

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INTRODUCTION

Merrickville and District Historical Society
POB 294
Merrickville, ON K0G 1N0
www.merrickvillehistory.org

Organizational background

The Merrickville and District Historical Society (the MDHS or the Society) is a volunteer-run non-profit organization established in 1965 and based in the Village of Merrickville-Wolford, a beautiful historic village spanning the Rideau Canal. As of 1982, it has been a registered charity and has no full-time staff, relying on a committed cadre of volunteers and volunteer board members to sustain the work and mission of the organization.

The MDHS encourages interest in the preservation and promotion of both built heritage and the history of Merrickville-Wolford and the surrounding area. Along with curating both the hardcopy and digital archives for the region, and organizing lectures throughout the year, the MDHS also operates the seasonal museum at the Merrickville Blockhouse National Historic Site of Canada and maintains a local cemetery. The Blockhouse Museum is operated on behalf of the Village of Wolford, which agrees to ensure that the Museum operates as part of its lease of the building from Parks Canada. The Blockhouse Museum opened in 1967 and has opened every summer since (except during COVID).

The Society operates on a shoestring budget. During COVID years, the operational budget has been less than \$10,000, but even in more active times, the operating budget hovers between \$24-\$33,000 per annum, depending on available grants.

Purpose and Methodology of this Research

Social Delta works with non profit organizations, co-operatives and individuals who are seeking to create business structures to increase their mission impact. As part of this work, Social Delta offers coaching services through the National Trust for Canada, and therefore has experience working with organizations across the country, both large and small, which protect, preserve and operate historic sites. MDHS has engaged Social Delta to review the trends of organizations with similar mandates in the Eastern Ontario region, and to solicit ideas and feedback on the strategic direction necessary for the Merrickville and District Historical Society to thrive and continue to fulfill its mission.

The initial section of this report provides a summary of the operational approaches of organizations operating public museums or archives which celebrate regional history in Eastern Ontario. This is not a comprehensive list of such organizations, but through the analysis of over 30 examples, several trends and best practices have been noted, and offer some important evidence to support the strategic growth and development of the Merrickville and District Historical Society.

Not all of the properties featured are operated by Historical Societies; some are federally funded and operated, some are owned and operated by local governments, and others operate under a hybrid structure. The hybrid structure often has the property owned by one of several levels of government (federal, municipal or county), or by a Heritage Society, while the staffing, maintenance and/or operations are carried out by an arms-length “friends of” non-profit organization.

Not all organizations, and particularly not the government owned sites, offer financial information on annual operating budgets, and it is unclear in many cases how many staff are employed. However, it is clear that the majority of the organizations researched operate with one (or fewer) staff members, fortified by summer student grants and often a significant cadre of volunteers.

One last note, this research has been conducted in the spring of 2022, while the effects of the COVID pandemic are still being felt in any public sites across the country. For two summer seasons, the organizations captured in this study have had to weather prolonged closures, volunteer challenges and disruptions in operations. Where possible, data from prior to the pandemic has been captured, but in some cases, the online updates on websites and social media for some of the organizations is perhaps not as current as would normally be the case. Having said that, it appears that very few organizations have closed; most have, in effect, been in a state of hibernation and strategic review. Many have attempted to create more robust online learning tools, including downloadable resources, virtual tours and digitizing collections and archival materials.

The initial (secondary) research was then used to generate a survey for the stakeholders of the MDHS, which was conducted online in late July, 2022. This primary research generated input from business owners, volunteers, donors and other community members and has been summarized in Section Two below.

From the primary and secondary research, Social Delta then highlighted various relevant considerations and networking opportunities for the Board to consider in future planning efforts.

And finally, this report concludes with eleven robust, informed recommendations for the Board of the Merrickville and District Historical Society to consider in the years to come.

SECTION 1: THE LANDSCAPE

Social Delta has reviewed a series of similar non-profit museums or historical societies across Eastern Ontario and a few leading contemporaries across the country. The following section documents the many best practices, governance models, revenue generating approaches and trends that will help inform the next chapter of MDHS's work. At the end of the detailed descriptions of each organization is a tabulated summary of key operational elements of each organization.

Military and Electronics Museum

www.candemuseum.org

Located in Kingston, Displaying the history of Canadian military communications and electronics from the early days of confederation to the present day. The museum also contains a large vehicle gallery, a German ENIGMA machine and three of the original 1/2 scale models used to design the Vimy Ridge Memorial.

The C&E Museum contains a gift shop, archives, conference room facilities and an education program for students and youth groups. Supported by the Department of National Defence, the Military Communications & Electronics Museum Foundation and generous donors, the C&E Museum offers a unique perspective into Canada's military heritage.

Open from 11-5, 7 days a week from May 5- September 4.

National Air Force Museum

airforcemuseum.ca

Astra, Ontario (Near Trenton)

The National Air Force Museum of Canada (NAFMC) is proud to honour the heritage of the Royal Canadian Air Force. Discover an aviation history full of valour and tradition through a wide variety of exhibits, interactive activities and displays including the fully restored World War II Halifax Bomber (the only one of its kind in the world).

Our 16-acre Airpark features both historic and active aircraft on display for an up-close and personal aviation experience. Also in the Airpark are over 10,300 Ad Astra Stones and 35 Monuments that pay tribute to both past and current members of the RCAF.

The Museum gift shop carries a wide assortment of aviation and Air Force memorabilia and unique gift items.

- Hours of Operation : 10:00 am to 5:00 pm
- Wheelchair Accessible : Yes

Mississippi Valley Textiles Museum

<https://mvtm.ca/mvt2/>

Social media: FB, Twitter, Instagram, YouTube
3 Rosumund Street East, Almonte Ontario



National Historic Site featuring textile exhibits and art. As they put it, “Explore the history of woolen industry in the Mississippi River Valley.” In their well-maintained building, they have four spaces, a 3000 sq.ft. temporary exhibit gallery, a permanent exhibit in the “Wool Hall Gallery, a 530 sq.ft. education room, and a modest gift shop and office on the main floor.

The main gallery and gift shop are open from 1-4, Tuesday to Saturday during the summer.

They have four staff, all of whom appear to be part time: an ED, a bookkeeper, a Curatorial & Museum Management Assistant, and an Exhibit, Education & Fibrefest Coordinator. They have a collection of 3,000 artifacts, from machinery to pay stubs.

Events and exhibitions:

- a community-based “fibre arts” festival (Fibrefest) annually in September (COVID notwithstanding)
- three permanent exhibitions: Material World on the Mississippi, Worker’s Walk and Staircase, and The Textile Mills in the Mississippi River Valley.
- Temporary exhibitions (current and forthcoming in 2022): Colour with a U, In the Forest, and Truth, Destiny and Self Determination.
- Virtual Exhibits: Faces and Fabric, Weaving History, Fabric of a Small Town, Warped, Grist for the Mill, Covid 19: A Stronger Weave.
- Workshops: (coming soon) related to Fibrefest and to textile craft activities.
- Archives: digital versions of the Almonte Gazette, 2000 publications on the textile industry.

Aside from a paid admission to special events (Fibrefest is \$7) and exhibits (typically less than \$5), they also rent out their education centre (with access to a kitchen) in order to generate earned income. The permanent gallery is currently being renovated (due to re-open in May, 2022)

Museum of Lennox and Addington

<https://countymuseum.ca/>

<https://lennox-addington.on.ca/museum-archives>

<https://lahistoricalociety.ca/>

Social Media: FB, YouTube, Twitter, LinkedIn
97 Thomas Street East, Napanee Ontario

The Museum is operated by the Lennox and Addington Historical Society, a registered charity. The museum is housed in the former county jail (operational until the early 1970's) and has close to 15,000 artifacts. It features exhibits, programs and events to explore the County's history from 1784 to modern day. Affiliated with the museum is Macpherson House and Park, located at 180 Elizabeth Street in Napanee. (850 meters away by foot/car, but only about 200 meters as the crow flies over the railway tracks).

The Historical Society also supports links to other small historical societies and museums in the region, including the in Bath Museum, ON (closed temporarily due to COVID) and the Neilson Store Museum (see entry below)

Special events include:

- Tuesday night at the Museum: Social event featuring local presenters
- Museum Kids: An array of programs including:
 - [Kids Collect](#)
 - [Family Memories](#) ([View Family Tree Templates](#))
 - [Museum All STEAM Ahead](#)
 - [Stop Motion Animation](#) ([Storyboard Template](#))
 - [Secret Codes](#)
 - [COVID-19 Time Capsule](#)
 - [Letter Boxing](#)
 - [Museum Confidential](#)
 - [Our Town](#)
 - [Historic Picnic](#)
 - [Kids Who Care](#)
 - [Historic Playdate](#)
 - School visits by appointment (and tailored to meet provincial curriculum)
- Live Events: Both learning and entertainment events
- Virtual Programs: a variety for all ages, including storytelling, and conversations with museum curators, conservators, and educators.
- Tours at the Macpherson house: including activities for kids in the summer.
- Special Events: special programs, lectures, panels, art parties and more, for example:
 - Movie Screening of an aboriginal movie on restorative justice
 - Photographing the night sky
 - Exhibit on the history of space toys
 - Book readings: a currently advertised event features an indigenous author from the region.

Daily admission fees are Adults \$3 and children under 12 free. An annual pass is \$25. This admission allows access for both museum and archives. There may be extra fees for special events and special programming.

Membership fees are \$25/yr for an individual, \$35 for a couple/family, \$30 for a company, and \$525 for a lifetime membership. Naturally, as a charity, they are able to issue donations for any gift over \$10.

The Lennox and Addington Historical Society offers occasional lectures and other events on topics of interest to members. The Society also welcomes participation from members who wish to share their own areas of enthusiasm by submitting articles for ***The County Chronicle***, donating research to the collection or by offering to participate as a speaker.

1000 Islands History Museum

<https://www.1000islandshistorymuseum.com/>

125 Water Street Gananoque, Ontario

Open year round:

April - September daily 10am to 4pm

October - March open Tue-Sun 10am to 4pm (closed Mondays)

They offer a virtual walking tour, downloadable from both the Apple and Google stores or online at <https://gananoque.stgry.app/> (They also provide a QR code for this on their website.)

Founded in 1995, the museum tells the story of Gananoque's varied history, from glaciers and muskies to pirates and picnickers. The museum is operated by The Historic 1000 Islands Village Foundation (Charity #898149463 RR0001). They offer interactive exhibits, a waterfront veranda and a gift shop. They are located in the Arthur J.E. Child building on the waterfront, where they offer exhibits, programming, and tours. They do offer guided tours for groups if you contact them.

Admission is by donation (unreceipted). They have a significant number of sponsors, as follows:

- The Corporation of the Town of Gananoque
- Canadian Heritage
- The Arthur Child Foundation
- The Davies Charitable Foundation
- St. Lawrence Islands National Park/Parks Canada
- Bank of Montreal
- Corning
- Dupont Canada Inc
- Gananoque Boat Lines

- 1000 Islands Community Development Corporation
- And for an annual gala: Christie’s International Real Estate, CIBC Wood Gundy, and Gananoque Boat Line.

They also operate a membership program with the following benefits:

- Single \$30/yr. Event invitations, biannual newsletter, vote at AGM.
- Single & Guest \$50/yr. As per single, but two votes at the AGM.
- Family \$75/yr. As per single, but three votes at the AGM.

They have a gift shop (where they do not charge Sales Tax apparently) and they also generate revenue through a room rental of their upstairs rotunda for events and meetings. Rental prices vary and are quoted separately.

They have a full time executive director, and 12 part-time staff and interns. (Management and Administration (staffing) accounts for approximately 50% of annual expenses in 2020 and 37% in 2019 (~110K in both years). Staff related to the delivery of programs is embedded in charitable program expenses.

Their annual revenue in 2020 (an admittedly depressed year) was about \$272,000, broken down as follows: (according to the submitted T3010 to the Charities Directorate)

- Federal Government \$119,211 (44%)
- Provincial Government \$1,545 (<1%)
- Municipal Government \$63,574 (23%)
- Charitable Foundations \$28,466 (10%)
- Donations \$24,640 (9%)
- Memberships \$6,505 (2%)
- Fundraising \$9,434 (3%)
- Earned income \$9,864 (4%)
- Other non-receipted \$8,826 (3%)

Note that prior to the pandemic, their revenue was slightly higher at ~\$294,000 and they had three full time staff and eleven part time staff. They earned significantly more from sales (~\$50K), significantly less from the Federal Gov’t (~\$73K), and significantly more from fundraising (\$17K in non receipted, and a further 20K in other non-receipted). Municipal and Provincial government grants were the same, and foundation and general donations were approximately equal.

They have a permanent gallery, summer exhibits, and various special events. Interestingly, they also have a portion of their programming (primarily for children) on the Species at Risk Act (they call these bilingual programs SARA saves/SARA Sauve).

Although they don't use the term archive on their website, they do have archival records, digitized past copies and free searchable database of the Gananoque Reporter, and they offer staff to do research for customers.

[Prince Edward County Museums](https://www.thecounty.ca/residents/services/museums/)

<https://www.thecounty.ca/residents/services/museums/>

The County Museums are the guardians of 35 buildings/structures and an estimated 50,000 artifacts. They are also the caretakers of heritage gardens, parkland, orchards, outdoor exhibits and an early 19th century cemetery.

Prince Edward County Council is the governing authority for the Museum system and receives recommendations from the Prince Edward Museum Advisory Committee.

The County developed a new tourism management plan for 2022. The strategy was determined by a committee made up of staff and citizen representatives. The plan places an emphasis on further improvements to municipal infrastructure and assets, as well as introducing greater benefits for residents, specifically responding to areas where residents felt they were negatively impacted.

In 2021, the County also adopted a new Official Plan, in which there is a section featuring the cultural heritage properties and how they are to be maintained. In this strategy, a great deal of power is afforded to the Prince Edward County Historical Advisory Committee (PEHAC)¹ which is a pseudo-independent group working as a *de facto* Historical Society. Membership in PEHAC has two members of council, a minimum of five and a maximum of eight public representatives (all of whom have a “demonstrated interest or expertise in local heritage conservation”), and the mayor is an *ex officio* member.²

There is a Council staff member, Chris Palmer, who is the Supervisor of Museums and Cultural Services. He may be worth contacting for more information on how to integrate historical society work with municipal government.³ He also has an assistant, Jessica Chase, who is the Assistant Curator for the museums of Prince Edward County.

Note that the main archives for the region are not located on any of the museum properties, but are located at 261 Main Street in Wellington, and has a full time archivist, Krista Richardson, on staff. She is also the contact for the Prince Edward Historical Society (ie the Council pays to staff the historical society).

¹ See section “3.3.4 Cultural Heritage Policies” in the strategy, that is available at <https://www.thecounty.ca/residents/services/planning/official-plan/>

² <https://www.thecounty.ca/government/boards-committees/heritage-advisory-committee/>

³ Chris Palmer's phone number is 613.476.2148 and his email is cpalmer@pecounty.on.ca

There is also a Prince Edward County Heritage Advisory Committee (PEHAC) which is statutory committee of the County Council. PEHAC members are appointed to provide advice to Council on all matters relating to the protection and promotion of the county's heritage resources, including those resources of significant architectural, cultural, historical, archaeological, natural or scientific interest within the county.

Aside from the properties mentioned below, the county also operates the Quinte Educational Museum and Archive (www.gema1978.org), which is located adjacent to the Ameliasburgh Village in a relocated one-room schoolhouse (built in 1904). The educational archives, featuring information regarding schools, teachers, students and curriculum is located in the Ameliasburgh Town Hall. The educational museum and archive also has a paid curator, Jennifer Sommer.

It is difficult to determine the budget for each of the museums operated by the Prince Edward County Council, but their 2022 budget notes that the annual operating expenses for "recreational and cultural services" was \$3.5 million in 2021 and \$4.0 million allotted for 2022. Of course, not all of that budget supports the museum network, but it is clear that there is money available for staffing and other costs. Moreover, the approved capital budget for 2022 includes discrete amounts for the following building maintenance and upgrade projects related to built heritage:

- Macaulay House Museum rear wing roofing \$150,000
- Ameliasburgh Heritage Village Accessible Pathways \$35,000
- Rose House Well & Rough-In Plumbing \$22,000
- Wellington Heritage Museum Electrical Upgrade \$16,000
- A study to produce a Cultural Heritage Master Plan \$180,000 (over two years)

Ameliasburgh Heritage Village

<https://www.thecounty.ca/residents/services/museums/ameliasburgh-heritage-village/>

517 County Rd 19 , Ameliasburgh, Ontario

Social Media: FB, Twitter, LinkedIn

Ameliasburgh Heritage Village has grown from one building, in 1968, to a full pioneer village. The main structure was built in 1868 as a Wesleyan Methodist Church. It became a United Church in 1925 and served the community until 1967. Over the years, several additional buildings have been added to the site including a log cabin, display barns, an operational blacksmith shop, a saw shanty, dairy and bee-keeping buildings, and a large stone building housing the Goldie Corliss 18-foot flywheel.

The village is the home of The Garden County of Canada, which featuring the Doug Crawford Canning Collection. Visitors can purchase a Sprague Foods Heritage Label canned good on site. The de Vries Natural Heritage Collection has 500 specimens of taxidermy. The village boasts the tallest church spire in the county, and pleasant grounds for strolling.

Open Wednesday-Sunday 10-4.

Admissions

- Adults \$5.00 (HST is include in all prices listed here)
- Seniors and Students \$4.00
- Children (5-12) \$3.00
- Family* \$14.00 (Up to two parents and their children under the age of 18)

Grounds are also available for rent, although rental rates are negotiated on a case-by-case basis, and are available by contacting the staff. There appears to be one designated “site curator” for the village museum, although there is a team of three (total, including the site curator) that staff all the PEC museums. As the museum is operated by the County, it is one of several sites that hosts events (such as an opening weekend in May, and an Artisans Day in June) or temporary exhibits (such as an exhibit this year on Weddings: Traditions and Superstitions)

Mariner’s Park Museum

<https://www.thecounty.ca/residents/services/museums/mariners-park-museum/>

2065 County Road 13, Milford, ON K0K 2P0



Ontario Mariners Park Museum explores the many ways the inhabitants of Prince Edward County have interacted with its surrounding waters, from fishing and ship building to ice harvesting and rum running, and recreational pursuits such as boat racing too.

The lighthouse relocated from False Duck Island beckons visitors to the site at South Bay, where they can also explore Fort Kente (a recreated fort from the 1812 War-era) and enjoy a picnic in the park.

Rose House Museum

Located in Waupoos in Prince Edward County, Rose House has survived since the early 1800s with few alterations, inhabited by several generations of the Rose family. Peter Rose arrived in Prince Edward County among first the Marysburgh settlers, made up largely of United Empire Loyalists and Hessian (German) soldiers who had fought for the British in the American Revolution. According to tradition, Rose House is constructed from salvaged timber from the community’s original Lutheran Church. Peter and his wife, Christianna Bongard, raised a large family in this modest farmhouse.

Wellington Heritage Museum

290 Main St (Highway 33), Wellington, Ontario

Wellington Heritage Museum is located in the heart of the village of Wellington. It was built in 1885 as a Quaker Meeting House and now features exhibits on local history. In 2021, they created a display paying tribute to a number of prominent Wellington ‘characters.’

Wellington Heritage Museum is a bicycle friendly site and the informal group, The Friends of Wellington Heritage Museum, have transformed the empty lawn behind the museum into a beautiful garden featuring heritage plantings, fully accessible walkways, bench seating, and a stage area. It also features a significant piece of public art, which is the focal point of the garden, positioned prominently at its north end.

The Friends hope that the garden will generate further interest in the museum, and will become a cultural hub for the village. The garden is designed to be a home for musical and theatrical performances; it will be a venue for art exhibitions, classes, talks, and history-based programs; and it can also host festivals, wine tastings and food-related activities. Alongside all these opportunities for activity, the garden will also provide a place for quiet contemplation, where visitors can find a few moments of peace and enjoy the beauty of their surroundings. All of this will be available to all people, at all times, whether or not the museum is open.

Bellevue House

<https://www.pc.gc.ca/en/lhn-nhs/on/bellevue>

35 Centre Street, Kingston, Ontario

Bellevue House is a national historic site (designated in 1964) featuring the house and gardens of Canada’s first Prime Minister John A. Macdonald. It was built in 1840 and restored to operate as a museum. Exhibits in the visitor centre commemorate his life and career, and costumed staff present the daily life of the Macdonald family.

The introduction on the website is a delicately worded description of where “Canadians can explore the complex legacy of Canada’s first Prime Minister, Sir John A. Macdonald, and share in conversations about Canadian history...visitors are invited to contemplate Canada’s colonial origins and the impacts of government policies in the creation of a country.”

There is a virtual tour online, and multiple “Xplorers” children’s programs offered. Approximately 20,000 visitors come to Bellevue house each year, and it is on the route of several tourist bus tours, and most are adults over 45. There are guided interpretive tours, and is instituting “innovative millennial-focused guided tours.”

The property is managed by Parks Canada and therefore there is a published (Draft) Management Plan, similar to the Blockhouse Management Plan discussed in [this report](#). Also, as a Parks Canada property, there was a Visitor Experience Strategy developed in 2017.

In 2018 an assessment was done that concluded that there was a need to invest \$2.13 million to repair the roof, update the electrical panel, restore the original plaster ceilings, and improving accessibility to and the carbon footprint of the building. These upgrades are underway as of 2022.

Boyd Heritage Museum

<https://www.theboydmuseum.com/>

21 Canal Street East, Babcaeygeon, Ontario

Located near Trent, the museum current exists in the building which was built in 1889 to house the The Boyd Lumber Co. The property and the cultural and heritage educational activities are operated by the A. Sheila Boyd Foundation.

The museum building also has housed the public library (until 2021) and the Chamber of Commerce (ongoing). The library's planned departure has left a portion of the building vacant and with COVID, they are still looking for a new full-time tenant. As of April 2022, the City has elected to donate the entire building to the foundation. It had previously been divided between the foundation and the city as a cost saving measure for the foundation. The new arrangement is due to be finalized in 2023, and will generate rent from the city to the foundation for the space still used by the city (Chamber of commerce, a possible community centre and a city-sponsored artist space)

The organization operate multiple community based events each year including a recurring "Wedding Dress" exhibit (using dresses from the local Kawartha Settlers' Village collection), a Ghost Walk, book sales, an antique show, community teas, a fall fair, Mingle Jingle Holiday the celebration, self-guided local historical walking tour, and the Kid's day during the Santa Claus parade. The museum is also a stop on the Kawartha Voyageur itinerary...this is a boat that takes tourists on the canal.

The Sheila Boyd Gallery (Sheila was the youngest child of the lumber baron, Mossom Boyd) is an art gallery accessed through the Bogcaygeon Library. Artists may hand their work for \$125/month or \$35/day, and the "art room" can be rented out for meetings/gatherings of up to 40 people.

The foundation reports modest grant income from the local and provincial governments (total <\$10K/year) and notes that the majority (almost 50%) of annual revenue comes for "unreceipted donations" which is presumably rental income and donations in lieu of admission fees.

Partners recognized on their website include Kawartha Lakes tourism, Archives Association of Ontario, Kawartha Lakes Public Library, Kawartha Settlers' Village, Globus Theatre, Parks Canada

(lock 32 on the Trent-Severn Waterway), and the Bobcaygeon & Area Chamber of Commerce. In early 2022, a team of museum volunteers walked to most businesses in town to ask them to join as partners/sponsors of the museum. This effort yielded the following new supporters:

- *Ball Real Estate*
- *LLF Lawyers*
- *Bobcaygeon Agricultural Society*
- *Lavish Locks*
- *Bobcaygeon Lions*
- *Purdy Jewellers*
- *Briarwood & Bay*
- *R.J. Brown Insurance*
- *British Empire Fuels*
- *Stewart Morrison Insurance*

Brockville Museum

<https://www.brockvillemuseum.com/>
<https://brockvillemuseum.wixsite.com/digitalmuseum>

5 Henry St. Brockville, Ontario

The Brockville Museum offers a variety of permanent exhibits, all focused on the history of Brockville and the surrounding areas. They also offer a series of virtual museum visits that mirror or expand upon the permanent exhibits, although they employ a quite rudimentary slide show user forwarding model. Their digital museum website also includes community-based activities like scavenger hunts, walking tours, exhibit stories and more.

Along with the exhibits, the museum offers a variety of programs geared to an adult audience throughout the year. These include workshops, lectures and seminars on a range of topics, such as Talk and Tea every month (recordings of past sessions are available for free), museum tours, local cemetery tours, how to preserve family treasures (cost: \$20 each or \$50 for three workshops), and more. The museum also offers children's day programming and school visits at the museum (although suspended during COVID).

The Museum is supported by the City of Brockville with three full time staff members, supervised by a Council appointed volunteer Board of Management. There are over 40 volunteers who support the staff roles of Curator/Director (Natalie Wood), Interpretation & Public Program Coordinator (Peggy Hause) and Administrative Assistant (Veronica Vareiro).

There is also a volunteer run non-profit registered charity, The Friends of the Brockville Museum, which manages the gift shop and assists with fundraising and archival work and is able to issue charitable receipts for donations. (Notably, donations are nominal, at ~\$1500/year). The "Friends

of...” charity operates with a ~\$28K annual budget, the majority of which (\$17K) comes from unreceipted donations (in lieu of admission fees) and gift shop revenues.

Although the operational budget is not easily found for the museum itself, the City of Brockville and the Ontario Ministry of Heritage, Sport, Tourism and Culture Industries provide core funding which is supplemented by earned income and donations.

The museum rents out rooms, conducts bespoke research and offers group tours. Rental rates are published online as follows:

- Meeting Room (includes use of tables & chairs): < 3 hours (\$75), 3-7 hours (\$145)
- Carriage Hall (after hours only) \$250/hour + \$100 Admin Fee
- Patio (no indoor access) \$10/hour
- Patio + Lobby (after hours only) \$20/hour
- There is a staff surcharge of \$50/hr for after hours rentals
- Non-profits and government are afforded a 20% discount

Add-on costs:

- Table & Chair Rental \$10/hour + \$50 Handling Fee (not applicable for “Meeting Room” rentals)
- Kitchen Fee #1 (\$10 – temp. storage < 24hours)
- Kitchen Fee #2 (\$50 – temp. storage & basic use)
- Coffee Service (\$50) (includes 1 dish rental)
- Dish Rental \$25 (per set of dishes, ie, 25 plates, or 25 cups, or 25 glasses)
- Table Cloth Rental \$8

[Bytown Museum](https://bytownmuseum.com/)

<https://bytownmuseum.com/>

1 Canal Lane, Ottawa

This historic site is significant because, like the Blockhouse, it is operated at the side of the Canal (in Ottawa), by an independent registered charity, out of a heritage building (The Commissariat Building, constructed in 1827) owned by Parks Canada. The museum is currently closed due to COVID.

However, in years when it has been open, typically only in the summer months, they claim to host “tens of thousands” of visitors each year. It was initially founded in 1917 by Women’s Canadian Historical Society of Ottawa, and the collection moved into the Commissariat Building in 1952. Admission prices are as follows: \$5 adult, \$4 students and seniors, and \$2 children under 12 (taxes included)

In their 2015-2020 strategic plan, they seek to be a “community museum for the 21st century” and in the last years they’ve taken significant action to digitize their collection and to engage the community in multiple ways, as listed below:

- Online talks presented by various members of the local community (on Black History, History of Public Transit, Women Museum Leaders, Jewish History in Ottawa, and more)
- A Youth Council (YoCo) which engages local youth (16-25) on issues of history. There is a blog, and the group also operates local projects and joins local events (Silk screening workshop, Youth mixer, grant writing webinar, Heritage Day, tours of the Canadian Museum of History, etc)
- Virtual museum: A selection of remote learning options for educators and parents.
- School programming (online and offline in normal times) and group tours: how locks work, Ottawa’s hidden history, architecture tours, local personalities in history, old maps, etc.
- City walking tours (Branded “City History Hunt”) featuring local architecture, history, Indigenous history, stories and legends, trains and transportation, and more.
- The museum houses a permanent collection (with a free downloadable MP3 self guided tour)
- They also have a temporary gallery featuring special exhibits, and a community gallery (located in the former cooper’s workshop) which allows community groups, embassies, cultural organizations and local artists to “tell their stories.”
- Online tour (with recorded audio) using Point3D commercial imaging software.
- Musical and other performances (Branded as “Let us entertain you”). These performances have been put online during the pandemic, but are recorded within the museum.
- Crafts and activities workshops for all ages.

They have partnerships with local tour operators (Aqua-Taxi, Paul’s boat line, Rideau Canal Cruises, Haunted Walks of Ottawa). For water tours, tickets can actually be purchased at the Museum Gift shop (or online).

They have a significant operating budget (~\$670K in 2019, ~596K in 2020) and in 2019, they generated revenue through the following sources:

• Grants *see below for sources	\$443,828	66%
• Giftshop sales and café income	155,150	23%
• Donations and fundraising	18,567	3%
• Admission fees	18,781	3%
• Other (eg memberships and venue rentals)	32,474	5%
• Investment income	4,034	<1%

Sources of Grant revenue are as follows:

	2020	2021
Heritage Funding Program	\$ 328,440	\$ 322,000

Canada Emergency Wage Subsidy	104,106	–
Emergency Museums Assistance Program Grant	41,860	–
Young Canada Works	33,968	36,281
Community Museum Operating Grant	26,317	26,317
Summer Career Placement Program	19,829	20,016
Community Foundation of Ottawa	10,000	10,000
ACFO Bilingual Grant	5,960	–
Amortization of deferred contributions related to capital assets (Ontario Trillium Foundation) and Cultural Facilities Funding Program	5,000	4,500
Canadian Heritage	3,450	5,400
MSP Translation funds	3,398	5,582
Strategic and Business Plan Development	175	2,662
Capacity Building Funding Program	-	11,070
Totals:	\$ 582,503	\$ 443,828

Memberships are \$25/yr for individuals, \$20/yr for students/seniors and \$35/yr for a family. There is a modest discount to purchase two-year memberships (double and subtract \$5). They also offer a “patron” membership, which is actually a charitable donation (that gives you a free membership) at the following rates: \$70/individual, \$65/student or senior, and \$80/family.

Members and patrons get video content delivered, a personal tour, unlimited access to gallery, ½ price admission for family and friends, 15% discount in the gift shop and café, invites to special events, and a vote at the AGM.

Carleton Place and Beckwith Museum

<http://www.cpbheritagemuseum.com/>

267 Edmund Street, Carleton Place, ON

Located in a beautiful stone building constructed in 1872 as the Town Hall and "lock up," which was converted into Victoria School in 1879. Hundreds of children passed through the doors until it closed in 1969.

The main floor exhibit gallery features permanent exhibits telling the story of the area and chronicling the town's history. The museum is operated by the Carleton Place and Beckwith Historical Society, an entirely volunteer-run non profit organization formed in 1980.

Admission is free. They offer annual memberships with the following fee structure: Individual - \$30.00, Senior - \$25.00, Family - \$50.00, Organization - \$75.00, or a Life Membership for \$200.00. On site parking is available.

Aside from membership revenues, they do garner modest income from room rentals, a small gift shop, and seasonal walking tours. During non-COVID times, they offer a the “Lloyd Foss” room for rental for very reasonable rates of \$45/per evening or half day, or \$80 for a full day. They have three advertised walking tours: The Mural Tour, the River Walk and the Lake Avenue West Wander. Tickets for these tours are \$10. They also offer a Cemetery Tour in October for \$20, which include refreshments inside the Crypt.

They have a collection of local community sponsors, including:

- Alan R. Barker Funeral Home & Cremation Services
- Canadian Career Academy
- Canadian Co-operative Woolgrowers Limited
- Carleton Place and District Chamber of Commerce
- Carleton Place Public Library
- Graham's Shoes
- Granary Bulk and Natural Foods
- IODE Captain Hooper Chapter, Carleton Place
- Laura Keller Real Estate
- Patterson Electric
- Riverview Seniors' Residence
- Sivarulrasa Gallery
- St. James Anglican Church

A group of community volunteers are creating a labyrinth on the property, adjacent to the existing Victoria School Garden, which is maintained by the Horticultural society.

[Champlain Trail Museum and Pioneer Village](#)

<http://www.champlaintrailmuseum.com/>

<https://www.facebook.com/ChamplainTrailMuseumAndPioneerVillage>

1032 Pembroke St. East, Pembroke, Ontario

Boasting “one of the largest collections of Ottawa Valley artifacts” this museum, pioneer village and archive is a registered charity operating year-round. The museum and site is operated by the Ottawa Valley Historical Society, and has grown in size and scale from early beginnings in 1955.

They charge admission at the following rates: Adults \$8, Seniors and Students \$6, Children 6-12 \$4, children under 6 free. There is also a family rate set at \$20. They accept donations as a registered charity, through CanadaHelps.org.

The organization created a five-year strategic plan starting in 2020, which features strategies to address the following five key priority areas, all of which are in keeping with the general trends in museum planning in the region:

- Exhibitions and Programming

- Collections, Curatorial, Research (a move to online using Past Perfect, and a specific mention to address outdated indigenous representation)
- Educational Partnerships (for youth and with schools)
- Administration and Finance
- Audience and Membership Development
- Volunteer Training, Recruitment and Reward
- Physical Premises (several buildings are in need of renovations/repairs)
- Branding and Marketing

Notably, their revenue development plans focus on increased grant applications and fundraising, and not on earned revenue models, nor increases to admission prices, nor event based revenues although they note in their SWOT analysis that “operating funds are hard to come by.”

The website is woefully out of date, with the listing of events not updated since 2019, and the Facebook page having no posts whatsoever.

Nonetheless, they have minor revenue sources from community programs, including \$100/hr for virtual museum tours and \$15/week/child rentals of a “museum in a box.” They also include the ability to rent out the property and buildings for weddings or events. Prices and terms are very reasonable, and are posted online as follows:

Museums are touchstones that create context for our lives and support a sense of belonging for residents. Rural museums often support necessary community roles beyond the preservation of artifacts. They are visitor information centres, social hubs, extensions of schools, referral centres and community partners in economic development.
 --Champlain Trail Museum 2020-2024 strategic plan.

Museum Grounds Rental	\$100.00 per hour
Church Rental for Ceremony	\$200.00
Table Rentals (per table)	\$10.00 per table
Chair Rentals (8 chairs)	\$5.00 per table
Additional Museum Visits	\$10.00

* In lieu of a security deposit we require information of a **valid** credit card that will be used if necessary. Any extra staffing, maintenance, set up or clean-up costs incurred, or any damage to the Mill building, artifacts, and general contents, will be charged to your credit card at the discretion of the Champlain Trail Museum and Pioneer Village.
 ** Full Payment is due upon booking. Cancellations are accepted, with a 50% refund, up to 90 days prior to the event.
 *** Additional costs and fees are at the discretion of the Champlain Trail Museum & Pioneer Village/OVHS management and may be negotiated with the Curator prior to the wedding/event; all fees will be clearly outlined in the final invoice.
 **** All payments must be made at minimum a *week* prior to the wedding/event at the **latest**.

Dorset Scenic Lookout Tower

<https://www.algonquinhighlands.ca/dorset-lookout-tower.php>

1191 Dorset Scenic Tower Rd, Dorset, Ontario

With a breathtaking 360 degree view, the observation deck of this historic tower stands 142 metres (465 feet) above Lake of Bays. The original tower was built in 1922, was 25 metres high (82 feet) and used as a fire lookout tower until 1961. The current tower was built in 1967 and is 30 metres high (100 feet) and was erected for visitors to enjoy the view. Admittedly, this is not a historic site, but it is a tourist draw because of both its history and the views it affords.

The Dorset Scenic Lookout Tower Park is operated and maintained by the Township of Algonquin Highlands. It is clearly a tourist attraction for the region as the website indicates that more than 10,000 vehicles (60,000 visitors) visit each year, with the peak Autumn season attracting as many as 600 vehicles visiting in a single day.

Facilities include picnic sites, restrooms, a tourist information kiosk, a gift shop and a hiking trail. They offer a downloadable trail map at no cost. They also have a live stream on the website featuring 360-degree views from atop the tower.

They are open from May to October, with special open hours over the winter if arranged in advance with the township. They charge for admission and parking according to the following schedule and all prices include HST:

Walk-Up	\$2.25
Car	\$11.35
Motorcycle	\$5.65
Coach/Van - up to 9 passengers	\$17.00
Large Camper/Van/RV/Mini-bus/10-15 passengers	\$28.35
Mini-Bus and/or 16-29 passengers	\$45.35
Coach Bus and/or 30 passengers or more	\$68.00
Seasons Pass*	\$28.35

*Season pass is limited to registration of two vehicles per household, NOT for shared use between households, NOT available for commercial use

Frontenac County School Museum

<https://www.fcsmuseum.com/>

414 Regent Street, Kingston, Ontario

This replica one-room school offers a display gallery and is run by the Frontenac County School Museum Association which collects, preserves and displays artifacts and archival material from the elementary (grades 1– 8) one-room schools of Frontenac County from their earliest establishment to the consolidation of school districts in 1970. The Association was founded by a group of retired educators in 1977, and opened to the public in 1979. It was moved to its current location in 2006 to occupy a historic building.

Admission is free, with a request for a donation (no specified amount). They sell annual memberships at \$30 for an individual and \$50 for a family, and a charitable receipt is given for all donations to the museum, including membership. (Social Delta note: this practice is not recommended for charities, as memberships are not considered the same as donations in the Charities Act). Interestingly, and featuring a tip of the hat to the world of academics, teachers and post-secondary students qualify for a reduced membership fee.

They do offer tours for groups (arranged in advance) at not cost, but with a “suggested” amount of a donation: \$5/person. For larger groups (over 10 people), the suggested donation is \$50.00 for a group booking.

One of the interesting things they offer are downloadable resources that are specifically designed to match the Ontario curriculum:

Science: grade 1 and grade 4 (includes shadow puppets and other science project)

Visual Arts: grades K-8 (paper cutting and more) .

Literacy: grades K-8 (word games)

Spelling: grades 1-5 Resources to run a spelling bee, complete with word suggestions.

They offer a “virtual museum” which is not a digital walkthrough. It is actually access to a shared Google Drive which features slides, audio interviews, teacher resources, a simple amateur video walkthrough (done with a cell phone and a musical backing track) and more. It is a very low tech way to share content, but it allows for easy tracking of demographic data (through the use of a Google form that permits access to the shared directories.)

They have recently (2021-22) received an operating grant (\$12,500) from the Ontario Trillium Foundation to help with the overhead costs of maintaining a historic building and operating the museum. They have an events calendar on their website, but there are no events planned. The museum and collection are available for self-guided tours.

The museum association operates primarily on grants, donations and sponsorships. They offer various levels of sponsorship and they recognize and acknowledge the support and guidance provided by the following:

- The City of Kingston
- K.A.M. – The Kingston Association of Museums, Art Galleries and Historic Sites
- Tourism Kingston

- The Limestone District School Board
- Ontario Ministry of Heritage, Sport, Tourism and Culture Industries
- Retired Women Teachers of Ontario, Kingston Branch
- Community Foundation for Kingston & Area
- City of Kingston Heritage Fund
- Delta Kappa Gamma Nu Chapter
- Young Canada Works
- Canada Summer Jobs
- The Department of Canadian Heritage
- The Ontario Trillium Foundation

Fulford Place Museum

<https://www.heritagetrust.on.ca/en/index.php/properties/fulford-place>

287 King St. East, Brockville, Ontario

This luxurious 20,000-square-foot Edwardian mansion was the home of Senator George Taylor Fulford and was constructed between 1899 and 1901. Fulford made his fortune on a medicine patent (and manufacture and sale of this medicine) and mass-circulation newspapers. The original grounds were designed by Frederick Olmsted of the Olmsted landscaping firm, which also designed Central Park in New York City. The garden features an elaborate triton fountain, statuary, stone walls and gates. Through generous donations from a number of individuals and organizations, the Trust restored the Italianate Garden, a key component of this nationally significant historic landscape.

Original tapestries, paintings, statuary and ceramics collected on the Fulfords' world travels are on display throughout the period rooms and are featured in special exhibits which change during the seasons. The property was used by the Fulfords to entertain Canadian Prime Ministers, British princes and the local wealthy whose "cottages" lined the St. Lawrence River.

The house was donated to the Ontario Heritage Trust in 1987. The Trust undertook an extensive restoration of the site with funds from the provincial government and opened it to the public as a house museum in June 1993.

The Friends of Fulford Place Association, an incorporated volunteer body, assists the Ontario Heritage Trust in the operation and public interpretation of this National Historic Site. The Friends lead tours of the house and grounds, conduct research, create interpretive displays and raise funds for restoration and interpretive projects. As described on the website, "The Trust's work at Fulford Place provides an example of how partnerships between public heritage organizations and local groups can work to conserve and promote a community's heritage."

The site generates earned revenue through admission (Adults \$10, Seniors and Youth \$8, Families \$25, and children under 6 free. They also offer group tours (at \$8/person), and they rent out all

or part of the facility for weddings, events and meetings. They can accommodate up to 56 seated guests for dining, 90 in “theatre style” seating and more in their outdoor spaces. Rental rates are not posted, as prospective renters are invited to contact the Heritage Trust directly for a quote.

They also accept donations (on their own site, not through a third party and the Ontario Heritage Trust is a registered charity that can offer a charitable receipt. (Note, however, that donations support all of the Trust’s work, unless specifically earmarked for the museum by the donor)

Glanmore National Historic Site

<https://www.glanmore.ca/en/index.aspx>

257 Bridge St. East, Belleville, Ontario

Glanmore National Historic Site opened as a museum in 1973 and is owned by the City of Belleville and operated by the Recreation, Culture and Community Services Department. The Museum also receives funding from the Ontario Ministry of Heritage, Sport, Tourism and Culture Industries. As a city property it is also considered Belleville's Community Museum.

As with Fulford Place, the entire house is a museum, from furniture to tapestries and many other artefacts related to local history are included as part of the restored rooms of the historic house as well as displays in the lower level. The museum also offers an online artifact database to see what kinds of objects make up Glanmore's artifact collections.

There is a fee for admission, and tickets can be purchased online for admittance at a certain time and date with a modest discount. The fees are listed as follows: (the fee in brackets is if the tickets are bought at the door)

- Adult - \$7.08 + HST - \$7.08 (\$8 at the door)
- Senior and Student - \$5.75 + HST - \$5.75 (\$6.50)
- Child - \$3.98 + HST - \$3.98 (\$5.50)
- Preschool Child – FREE (free)
- Family rates are available at the door only at \$25

Visits to Glanmore National Historic Site are self-guided, however, although there are (five!) staff on site to answer questions during a visit.

There is a mention that the site is available for rentals, and for wedding or other photography. The fees vary according to the following schedule (HST is extra):

Weekdays – Breakfast Room or Lower Level Room Rental (3 hours)	\$ 250.00
Weekend/Evening – Breakfast or Lower Level Room Rental (3 hours)	\$ 400.00
Set-up/Take Down Fee	\$ 100.00
Use of kitchen	\$ 75.00
Weekdays - Grounds only event (3 hours)	\$ 250.00

Weekends - Grounds only event (3 hours)	\$ 300.00
Weekdays - Additional hourly rate for time after 4:30 pm	\$ 50.00
Weekends - Additional hourly rate for time after 4:30 pm	\$ 75.00

Photography on the grounds requires a permit, with the following fee schedule:

Grounds only photography permit	\$ 50.00
Weekdays - Interior Photos (3 hours) Permit	\$200.00
Evenings/Weekends Interior Photos (3 hours)	\$300.00
Weekdays - Additional hourly rate for time after 4:30 pm	\$ 50.00
Weekends - Additional hourly rate for time before or after museum hours	\$ 75.00

Glengarry Pioneer Museum

<https://glengarrypioneermuseum.ca/>

1645 County Rd. 30, Dunvegan, Ontario

Operating under the slogan “Preserving our past, enriching our future,” The Glengarry Pioneer Museum celebrates Ontario’s Celtic roots.

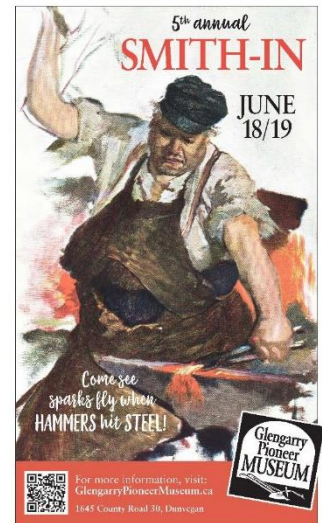
Opened in 1962, the Glengarry Pioneer Museum consists of several nineteenth century log heritage buildings and artifacts. The museum’s original structure started life as MacIntosh’s Store in the 1840s. It then became the Star Inn, a stagecoach stop in the 1860s. It is this period that the inn is furnished to reflect...including the original barroom, believed to be one of the oldest in Eastern Ontario.

The museum is now operated by an independent non profit (as of 2013) and the site hosts regular community events, from blacksmithing competitions to concerts, art shows, and honey fairs.

They offer memberships, which provide free admission and discounts for special events, rentals and gift shop purchases, at the following rates:

- Individual annual member – \$20
- Family annual member – \$30
- Individual Life Member – \$250

The museum is open from May to October.



Regular Admission fees are as follows:

Adults – \$5.00

Students – \$2.00

Children under 5yrs. – FREE

Members – FREE

Special Event Admission:

Adults – \$10.00 (Members: \$5)

Students – \$5.00

Children 5 yrs. and under – FREE

Families – \$25 (Members \$15)

Note that The Glengarry Pioneer Museum has partnered with local libraries in Stormont Dundas and Glengarry and in Prescott Russell Counties. The libraries have agreed to promote museums across this region by loaning out free Museum Passes to visit the Glengarry Pioneer Museum.

“The Glengarry Pioneer Museum is an exceptional organization. It is exceptional because it is a museum that is run by the members of the community. Although we do get support from various levels of government, most of the leg work that keeps our museum operating is done by dedicated volunteers. It is a shining example of what it means to live in this area.”

Matt Williams, Chair of the Board.

The museum buildings and grounds are also available for rentals for weddings or other functions. The rental rates are reasonable at \$250 for four hours, \$400 for 8 hours. The discounted rate for members and/or non profit organizations is \$200/4 hours, \$300/8 hrs.). The staff will provide guidance and will be there to protect the artifacts, but rentals are designed to be “do-it-yourself” efforts with the renter responsible for set up/decorating/catering/cutlery rental/ tear down/cleanup/insurance etc. The website features a downloadable brochure outlining all the terms and conditions for rentals.

The annual operating budget (2020, during COVID) was ~\$67K, and 50% of income was grant revenue and approximately 50% was spent on staff costs. Other revenue sources include donations (\$13K), rentals (\$11K), event revenue (\$4K), Admissions and Membership (\$2K), and gift shop (\$217). The most significant expense other than salaries was maintenance (\$13K).

Madonna House Pioneer Museum and Gift Shop

<http://www.renfrewcountymuseums.org/museums/madonna-house-pioneer-museum>

2887 Dafoe Rd., Combermere, Ontario

Catherine Doherty, foundress of the **Madonna House Lay Apostolate**, opened the Madonna House Pioneer Museum in 1967 after seeing a need to collect and preserve items that were vital to the lives of local pioneers. The museum is currently closed due to the pandemic, but it displays of old tools, cobbler and farm implements, kitchenware and the hundreds of authentic artifacts from pioneer homes and farms. The building was built from hundred-year-old hand-hewn logs by experts in the Madawaska Valley. Every artifact is a gift from a generous benefactor interested in preserving the history of the area.

The museum is part of the Renfrew County Museums network and it is open from May to September. Admission is free. The end of the season is typically marked by the Heritage Festival hosted on the museum grounds, featuring crafts, music, community events, and a puppet show.

The museum is supported by a gift shop operated by the religious organization, and which features locally donated items, and crafts. The museum is entirely funded by the resources of the Catholic order.

McDougall Mill Museum

<https://renfrewmuseum.ca/>

65 Arthur Avenue, Renfrew Ontario, K7V 351

Currently “closed for the season” is posted on their website, which suggests that they have been closed for the duration (and continuation) of the COVID pandemic.

Built in 1855, the McDougall Mill Museum is housed in a stone building constructed by fur trader and Hudson’s Bay Company agent, John Lorne McDougall. It was originally used as a grist mill then renovated and reopened as the McDougall Mill Museum in 1969. It is located in O’Brien Park, near the second chute of the Bonnechere River and overlooking the historic Swinging Bridge.

As with many museums established to celebrate the history of colonial settlements across the county, they take note of the changing trend to acknowledge Indigenous communities: “Though the majority of the McDougall Mill Museum’s artifacts celebrate local history, we also exhibit items donated by local Indigenous communities and international locales.”

There are three floors of artifacts, featuring the manufacturing successes of the town (electrics, ice boxes, wood stoves, and flour mill and creamery products), the artistic and photographic work of local artisans (including Indigenous), clothing through the ages, and of course a collection of artifacts related to the grist mill and its operations.

The exhibits page link is broken and there is no indication of admission fees or donation options.

Matheson House (Perth Museum)

<https://www.perth.ca/en/visit/perth-museum.aspx#>

11 Gore St. East, Perth, Ontario

The Perth Museum is a national historic site, owned and operated by the Town of Perth

The house was built in the 1840s built for the Honourable Roderick Matheson, a senator in Canada’s first parliament after Confederation. There are four period rooms, expertly restored to

bring the era to life. One of the “attractions” are a set of pistols that were used in Perth’s “Last Fatal Duel” in 1833.

The building features publicly accessible ground that have picnic benches and gardens featuring plants and flowers in line with the 19th century time period. There is still a specialty outdoor oven and herb garden, used for events held throughout the year.

This museum houses the city archives and the Visitor Information Centre and the geological holdings of citizen scientist Dr. James Wilson. Perth, evidently, sits on the boundary of two important geological features: the Canadian Shield (granite) and the St. Lawrence Lowlands (sedimentary and shale)

The “rock cycle” is a self-guided 42km cycle route that starts at the Matheson House and visits various geological formations in the region.

Open 10-5 Wed-Sun. Guided tours up to five can be booked online (using an Eventbrite page). Larger groups can book a tour by calling (1-855-326-1947)

Maison MacDonell Williamson House

<http://www.mwhouse.ca/>

25 Rue des Outaouais, Chute a Blondeau, ON K0B 1B0 (East Hawkesbury)

The Macdonell-Williamson House, known as "Poplar Villa" or "Scotus" was built by John Macdonell on his retirement circa 1817. It is located in Ontario on the Ottawa River adjacent to the village of Pointe-Fortune, at the border between Ontario and Quebec (Upper Canada and Lower Canada). The house was acquired in 1978 by the Ontario Heritage Foundation in order to save it from demolition. Extensive architectural and archeological investigations were carried out.

As of 1997, the Friends of the Macdonell-Williamson House Inc. have become the custodians and are working to have the house become a cultural, historical and tourist centre, serving nearby counties and beyond. They offer annual memberships (individual \$10, Senior \$5, Family \$15, life member \$200) which are (appropriately) not tax deductible, but they are able to issue tax receipts for donations over \$20.

The organization runs a weekly “tea room” for \$5/person which features scones, tea and local cream and local jams and jellies. They will offer a guided tour (with “Complete English Tea” service) for groups of 10 or more for a price of \$10/person.

Admission to the museum appears to be \$3/person (under 12 are free). There are many weekend events set up throughout the summer, from baked bean socials, to book sales, to entertainment and cocktail parties to wool spinning displays and book launches. Prices for these events vary from \$10-\$25 per person.

The museum and grounds were closed for COVID and were to re-open in July, 2022.

Neilson Store Museum and Cultural Centre

<https://neilsonstoremuseum.ca/>

5220 Front Road

Stella Ontario K0H 2S0

(Located on Amherst Island in the St. Lawrence River)

This museum is a replica of the general store that was opened in 1873 and operated for 100 years by the descendants of James S. Neilson, an island grain merchant. This is a small building that has been restored and preserved and is in regular use by the community for multiple purposes.

Their giftshop, The Weasel and Easel, is run by volunteers and features work by local artisans and craftspeople. They have a very simple, but good “online self tour” allowing visitors to virtually walk through the exhibits and gift shop. The back room is set up to host meetings, trainings, workshops as well as the regular Back Room Talks. These “talks” are community programming in the renovated back room of the general store museum. Talks are about history and many other diverse topics (building a banjo, managing threatened frogs or owls, fall prevention for seniors, etc). The non profit also operates an internet café.

Admission to the museum is by donation and about 1200 visitors come each (normal) year. They are a registered charity, with 100 members and the monthly Back Room Talks typically attract 25-30 people. They also offer community programming, notably for school age children. Programming and events and sales accounts for ~90% of their (admittedly modest annual income of ~\$11,000)

They accept donations as a charity (but only \$100-200/year), but they also feature sponsors on their website, including the following groups:

- Amherst Island Men’s Society
- Amherst Island Mutual Insurance Co.
- Classic Video Kingston
- Kingston Online Services
- Lafarge Canada Inc.
- Loyalist Township
- The Ontario Trillium Foundation
- PELA Community Futures Development Corporation
- RTO/ERO Retired Teachers of Ontario District 20

Nor'westers and Loyalist Museum

<https://www.glengarrynorwestersandloyalistmuseum.ca/>

19651 John St., Williamstown, Ontario

This museum “preserves and interprets the history of the United Empire Loyalist migration to Glengarry County and of the Glengarry partners of the North West Company.”⁴ In the footer of the home page of the website, notably, there is a land acknowledgement.

In 2021, the Glengarry, Nor'Westers and Loyalist Museum received a \$13,900 Resilient Communities Fund grant from the Ontario Trillium Foundation to rebuild and recover from the impacts of COVID-19. This grant has allowed the museum to adapt its programming for online delivery.

A recent event which featured stories of the lives and the contributions made by local farmers through out the history of the region. This was done in partnership with the Ontario Association of Agricultural Societies and led to a publication entitled “Salute to Farmers of South Glengarry.”

They offer annual memberships, with a creative twist:

- Trapper: Individual membership for one person (cost of \$20).
- Wintering Partner: Dual membership for two people (cost of \$30)

It is noted that previous "Lifetime Members" are grandfathered, although they no longer offer lifetime memberships.

Other than special events, there doesn't appear to be an entrance fee.

In a typical year, the museum offers a variety of events and services:

- Tea talks (\$10/\$5 for members)
- Tea for Two... a small lunch provided to guests outdoors (\$30/pair of guests)
- Lending library,
- A summer Ceilidh (party) (\$5/person)
- Art displays and sale
- Wine and Cheese fundraiser
- Ribfest
- Rental of the grounds, buildings or the outdoor pavillion (fees based upon a conversation)

Railway Museum of Eastern Ontario

<https://rmeo.org/>

⁴ The NorthWest Company was the rival to the better know “Hudson’s Bay Company” in the fur trade of early Canada.

90 William St. W., Smiths Falls, Ontario

The Railway Museum of Eastern Ontario is governed by the Smiths Falls Railway Museum Corporation made up a volunteer board of Directors. This museum has, in the past, been staffed and run by employees of the City of Smith Falls. They have an extensive collection of rolling stock and inspection vehicles as well as over 10,000 artifacts, archival and library materials.

Admission fees:

Adults: \$7.00

Seniors / Students: \$6.00

Child (Ages 5 -12): \$5.00

Child (Ages 4 & Under): Free

Family (max 4): \$20.00

Annual Membership rates (HST not included):

Household (2 adults and up to 3 children under 18 at the same address): \$50

Grandparent(s) (2 seniors (60+) at the same address and grandchildren under 18: \$45

Individual (Ages 18 +): \$20

Railway Worker/Family Member: \$15

(With proof of employment or family member's employment with any railway company)

The museum operates a number of community programs and activities:

- A December "North Pole Express" train ride
- An ability to sleep overnight in a caboose on site
- Educational programs for kids/school groups (with specific activities geared to provincial curriculum: history, science, physics, economic development, art and drama, etc)
- Outdoor grounds kitchen facilities
- Lunch space with picnic tables
- Meeting rooms
- Free parking

Regrettably, their Donation Page is currently a broken link (404 Error). It is unclear if the non profit is registered as a charity or not.

[Ross Museum](#)

<http://www.rossmuseum.ca/>

2022 Foresters Falls Rd. Foresters Falls, ON K0J 1V0

Ross Museum is run by the Whitewater Historical Society, and offers an exhibit of period furniture, antique china, pottery and kitchenware of an early settler at home (which was moved to the current site in 1995 from the shores of Muskrat Lake). They also have an Exhibit Hall, in which there are replicas of the old general store, schoolroom, chapel, barber and millinery shop.

On the property is the “resource centre” which houses archival records on land ownership, family histories and more.

Outside, the gardens provide a scenic setting with natural, perennial and annual flowers. Visitors can have a picnic lunch on the grounds. Ross Museum was established in 1995 and is operated by volunteers, and they welcome members. Annual individual memberships are \$10 and a family membership is \$15. They accept donations, and suggest they can issue a tax receipt, but there is no record that they are a charity on the government website.⁵

Notably, the website was last updated in 2014 and this includes the list of community activities: BBQ and Pioneer Day, Art and Music in the Garden, Family Day and Fun History Challenge.

They have posted some interesting online content, including an invitation to have individuals contribute historical photos from the region, various local family histories written by historical society members, and a self-guided tour of the Whitewater Region. Although they provide a link to content in the Virtual Museum of Canada, it is clear that this government service has changed its focus as of 2020, now providing resources and support to individual museums to digitize their collections, rather than creating a central repository of digital artifacts and stories.⁶

Smith Falls Heritage House

<https://www.smithsfalls.ca/heritage-house/>
<https://www.facebook.com/HeritageHouseMuseum/>

11 Old Slys Road, Smiths Falls, Ontario

In the early 1850’s the lure of plenty of water power and the promise of railway development attracted Joshua Bates, founder of nearby Farmersville (now Athens), to a site beside the roaring waters of Old Sly’s Rapids on the Rideau Canal. Bates built two mills on property leased from the Crown and promoted the development of the Brockville and Ottawa Railway Company. After suffering considerable losses in his milling operations and investing heavily in the now bankrupt railway company, he began construction of his large frame house in 1861. Regrettably, he died in debt on January 1st, 1864. After many years of neglect, the Corporation of the Town of Smiths Falls purchased the once dignified country estate in 1977 for use as a community museum.

The City of Smith Falls still owns the property and there is a full-time staff member paid for by the city (and a further two staff paid for by summer grants or other grant programs). The relationship between the staff on site and the city manager is somewhat “at arms length” as the city decisions on budget and repairs often neglects the input or needs of the museum curators and operators.

⁵ Registered charities in Canada can be searched at https://apps.cra-arc.gc.ca/ebci/hacc/srch/pub/dsplyBscSrch?request_locale=en

⁶ See <https://www.digitalmuseums.ca/vmc-decommissioned/> for more information on the changes to the Digital Museums of Canada efforts to support small heritage museums and archives.

Today, the Smiths Falls Heritage House Museum functions as a community museum and historic house, depicting the upper middle-class life of the Bates Family circa 1865-1875 and featuring a changing display of Smiths Falls artifacts and history, traveling exhibits and art shows. A visit offers unique mirror-image facades, an indoor brick bake oven, period rooms, exhibition galleries and a famous two-story privy.

The grounds are located on the Rideau Canal at Old Sly's Lock Station. The property is available for picnic, photos or family gatherings. The building and the grounds can be rented for group bookings, meetings, or weddings. Rental rates are negotiated.

The creative team operating the museum are working to make the site a "living" museum. Displays are no longer behind velvet ropes. Antique toys are offered to children to play with. A selection of hats and jackets can be tried on.

There are many events organized by the museum, including the following:

- A study of the ghosts that are apparently residing in the house
- A Halloween themed haunted house
- Outdoor tours (which include the lockstation)
- Tea and Trivia evenings
- Children's summer day camps
- Canada day fireworks
- Photo challenges
- Pub crawls.
- Movies under the stars

There are also modest plans in the making to create an outdoor café, with a possible pizza oven constructed on site.

Family researchers should also note that the Lanark County Genealogical Resource Centre is located on site. Library access is \$5 per day or \$20 per year and can be purchased at the Museum.

[Tweed & Area Heritage Centre](#)

<https://www.facebook.com/tweedandareaheritagecentre>

40 Victoria St N., Tweed, Ontario

"The Tweed & Area Heritage Centre houses a variety of services. We have a museum with various collections displayed, a vast archive, a gallery promoting local artists and we act as an information and welcome centre for the tourists and the residents of Tweed and the surrounding area."

A registered charity as of 1990, offering a multipurpose facility in Tweed. They have several galleries featured in the building, including the Children’s Gallery, the General Store Gallery, the Quilt Gallery, the Radio Collection, the Railway Gallery, a Native Heritage Gallery, and the Doug Connor Memorial Tool Collection.

The building also includes the Morton Archives, featuring many local families’ genealogies, local marriage, land ownership, and birth and death records. There is a dedicated room (the Meiklejohn Reference Room) to view the archived materials or other items in the museum’s collection.

There doesn’t appear to be any admission fees, but they do sell annual memberships to the Tweed and Area Historical Society, at \$10 per individual, and \$15 per family. The Historical Society is a registered charity, and approximately half of their annual income comes from both receipted and unreceipted donations. They receive very limited grant dollars (about 10% of total) from government.

Lougheed House

<https://lougheedhouse.com/>

707 13 Avenue SW, Calgary, AB, T2R 0K8

The former home of Senator and Lady Lougheed is restored house and gardens designated as a provincial historic resource and national site which functions today as an Alberta provincial historic site with multiple uses. These uses include a museum, exhibitions and educational programming and events spaces, a shop, and venue rentals. A restaurant is operated through a subcontracted third party.



LOUGHEED HOUSE

The eastern portion of the property is owned by the City of Calgary and includes city owned park space and the formal, restored Victorian Gardens of the Lougheed House. This portion of the property is maintained by the City’s Parks Department, except for the flower gardens and beds, the responsibility for which is with Lougheed House and its gardening team. The Lougheed House Preservation Society works with the Province’s outsourced property manager to care for the rest of the estate on the western portion of the property, and the House, walkways and a parking lot. Gardens on the western portion of the property are the responsibility of Lougheed House. Maintenance and capital upgrades are the responsibility of the Province, which also provides approximately 40% of the Society’s annual operating funding. The Society operates the facility, animates the site and pursues revenue generation through a variety of streams.

A driving factor in Lougheed House’s success is that the Society exists solely to operate the site.

The House and Shop are open Thursdays & Fridays 11-4, Saturday & Sundays 10-4. Admission rates are as follows: Adults \$8.50, Senior and Students \$6.50, Youth \$5.00, Family \$25, child under 6 free. (It is also free for Society Members, National Trust Members, military personnel, and specific heritage society members. Restaurant diners pay only \$4 admission). There is free parking available and the Society is a registered charity. The gardens are free and open 7am-11pm everyday.

Summary of Landscape Research

Organization	Organizational Details							Sources of Revenue							Notes	
	# of staff	Open hrs	Archive	Online presence	Community Partners	Charity	Registered Property	Giftshop	Admission Fees	In-house progs	Community Progs	Grants	Donations	Memberships		Other revenue
Merrickville & District Historical Society	0	S,O	O	Y	Y	Y	Y	N	N	N	Y	Y	Y	Y		Parks Canada owns site, Village is responsible for museum
Military and Electronics Museum	?	S	Y	Y	Y	?	N	Y	?	Y	Y	Y	Y	Y	N	Conference room for rent. Support from DND
National Air Force Museum	?	YR	Y	Y	Y	Y	N	Y	Y	Y	N	Y	Y	N	N	Ad Astra Stone sponsorship opportunity
Mississippi Valley Textile Museum	1, 3	O	Y	Y	Y	N	Y	Y	D	N	Y	Y	Y	Y	Y	Virtual exhibits and site rental opportunities
Museum of Lennox and Addington	?	YR	Y	Y	Y	Y	Y	Y	Y	Y	Y	?	N	Y	N	MacPherson House open during summer
1000 Islands History Museum	1, 12	YR	Y	Y	Y	Y	N	Y	D	Y	N	Y	Y	Y	Y	
Ameliasburgh Heritage Village	1-2, operated by Prince Edward County	YR,O	N	Y	Y	N	Y	N	Y	Y	Y	PEC FUNDS	N	N	Y	Sell canned goods
Mariner's Park Museum		S	N	Y	Y	N	Y	N	Y	N			N	N	N	
Rose House Museum		S	N	Y	Y	N	Y	N	Y	N			N	N	N	
Wellington Heritage Museum		S	N	Y	Y	N	Y	N	Y	Y	Y		N	Y	N	Supported by "friends of"
Belleview House	2+, 5+	S	N	Y	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Owned and operated by the Federal Gov't
Boyd Heritage Museum	0,3	S,O	N	Y	Y	Y	Y	N	D	N	N	Y	Y	N	N	
Brockville Museum	3.0	O	N	Y	N	Y	N	Y	D	Y	Y	Y	Y	N	N	"Friends of" is a charity
Carleton Place and Beckwith Museum	?	O	Y	Y	Y	?	N	Y	N	?	Y	Y	Y	Y	Y	Oral histories recorded, Room rentals available
Champlain Trail Museum (& Village)	2, ?	YR	Y	Y	N	Y	Y	?	Y	?	Y	Y	Y	Y	N	
Dorset Scenic Lookout Tower	O, ?	S	N	Y	N	N	N	Y	Y	N	N	N	N	N	Y	Operated by the township

Organization	Organizational Details							Sources of Revenue								Notes
	# of staff	Open hrs	Archive	Online presence	Community Partners	Charity	Registered Property	Giftshop	Admission Fees	In-house progs	Community Progs	Grants	Donations	Memberships	Other revenue	
Frontenac County School Museum Assn	1, ?	S	N	Y	Y	Y	Y	N	N	Y	Y	Y	Y	Y	N	
Fulford Place Museum	?, (many)	S	N	P	N	Y	Y	N	Y	Y	N	Y	Y	N	Y	Ontario Heritage Trust owns it, and they are a charity
Glanmore National Historic Site	5, ?	YR	N	Y	Y	N	Y	N	Y	N	N	Y	Y	N	Y	Site rentals
Glengarry Pioneer Museum	?	S	N	Y	Y	Y	N	Y	D	Y	Y	Y	Y	Y	Y	Site rentals
Prince Edward Historical Society	0	O	N	Y	N	Y	N	N	N	N	Y	Y	Y	N	N	Limited online presence
Madonna House Pioneer Museum	0	S	N	Y	N	Y	N	Y	N	Y	N	N	Y	N	Y	Pay what you can family camps
McDougall Mill Museum	0	C	N	Y	N	?	N	N	?	N	N	?	N	N	?	Website out of date, possibly no longer operational
Matheson House (Perth Museum)	?	YR, O	Y	Y	Y	N	Y	Y	D	Y	N	N	Y	N	Y	Town can issue receipts for donations
Maison MacDonnell Williamson House	?	S,O	N	Y	Y	Y	Y	Y	Y	Y	Y	?	Y	Y	?	Weak online site
Nor'westers and Loyalist Museum	0, ?	S	N	Y	Y	Y	N	Y	N	Y	Y	Y	?	Y	N	Weak online site, giftshop is actually a bookstore only
Railway Museum of Eastern Ontario	?	YR	N	Y	Y	N	Y	Y	N	Y	Y	Y	?	Y	Y	Sleep in a caboose, formerly owned/operated by town
Ross Museum	0	S	Y	Y	?	Y	?	N	N	Y	Y	Y	Y	Y	N	Possibly Closed
Smith Falls Heritage House	3, 0	S	Y	P	Y	N	Y	N	D	Y	Y	Y	N	N	Y	Site rentals, owned operated by town
Tweed & Area Heritage Centre	1, ?	YR	Y	S	Y	Y	N	N	N	N	Y	Y	Y	Y	Y	Art Gallery. No website, only social media
Neilson Store and Museum	0	S,O	N	Y	Y	Y	Y	Y	D	Y	Y	Y	Y	Y	Y	Dry stone wall competition, internet cafe
Bytown Museum	6, ?	S	N	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Venue rentals. Run by federal gov't (Parks)

Summary of Findings Chart Notes:

Organizational Details:

- # of staff: If there are two numbers, the first is full time, the second part time, including Summer students. Zero indicates no paid staff, only volunteer run.
- Open Hours: Year-round (YR), Seasonal/Summer Only (S), Only open occasionally (O) or Closed (C)
- Archive: Yes archives on site (Y), No archives (N),
- Online Presence: Unique URL (Y), part of a parent URL (P), Only Social media (S), no website (N)
- Community Partners: Host (physical space) partner (Y), Funding partner (F), Staffing Partner (S)
- Charity: Yes/No
- Registered Property: Registered as a historic place with either provincial or federal bodies.

Sources of Revenue Details:

- Giftshop: Yes/No
- Admission Fee: Yes/No. Pricing details in narrative writeup, or D for “by donation”
- In-House Programming: Yes/No. This is defined as programs offered within the physical location.
- Community Programming: Yes/No. This is defined as fee-based programs offered outside the physical location.
- Grants: Yes/No. These can be charitable, municipal, private, corporate or government grants
- Donations: Yes/No. These are typically individual donations that may or may not be receipted (eg. admission by donation)
- Memberships: Yes/No. See narrative write-up for more details.
- Other: Yes/No. This might include contributions in kind (services, products, artefacts), earned revenue activities. or could be corporate sponsorship. See narrative write-up for more details.

Relevant Agreements in Place

Merrickville Blockhouse NHS Management Plan (February 2007)

This is a formal policy document written by Parks Canada that outlines the role of Parks Canada in the management of the Blockhouse.⁷

“The goal of this management plan is to ensure the commemorative integrity of the Blockhouse, including the application of cultural resource management principles and practice. While respecting this primary goal, the management plan also guides the provision of appropriate opportunities for public appreciation and enjoyment, and the administration of the site.”

Although dated, this management plan is the (first) formal strategic document that enshrines the relationship between Parks Canada (the administrator), the Corporation of the Village of Merrickville-Wolford (the leaseholder) and the Merrickville and District Historical Society (the museum operators on behalf of the village). The document text states “although the plan has a 10-15 years life span, it is reviewed every 5 years to reflect new conditions, policy direction and legislation.” However, there has not been an update, although there has been a recent effort to revise the document (see below) through community consultations.

Notably, it is clear in the document that “Under the *Parks Canada Agency Act*, Parks Canada has a mandated responsibility for ensuring the commemorative integrity of the national historic sites for which it is responsible.” In fact, there is a documented commemorative integrity statement for the Merrickville Blockhouse,⁸ listing it as one of 18 “level one cultural resource” buildings because they are considered to represent or symbolize the national significance of the site. The other level one buildings include 12 lockmaster homes, a total of four blockhouses, the blacksmith shop at Jones Falls and the Commissariat Building at the Ottawa Locks.

The use of the Blockhouse as a community museum is a beneficial, successful partnership between Parks Canada and the Merrickville and District Historical Society, based on shared values and mutual respect.

As a local museum, it also presents nationally significant messages and contributes to Merrickville’s heritage-based economy and growth in tourism.

A sense of stewardship of the Blockhouse and an appreciation of its values as a national historic site are exemplified in the Village’s commitment with Parks Canada to protect and operate the Blockhouse.

--Chapter 5.2, Shared Vision, of the approved 2007 Blockhouse Management Plan

⁷ The 2007 Plan can be downloaded at <https://publications.gc.ca/site/eng/376038/publication.html>

⁸ See chapter 6.2 in the Rideau Canal Management Plan available at https://www.pc.gc.ca/en/docs/r/on/rideau/pd-mp/page_A-06

Level one Canal buildings are deemed to be “not under threat” when their historic characters and heritage settings are safeguarded, and a “regular monitoring and maintenance regime is in place,” and their historic values are “effectively communicated to the public.”

In this Management Plan, there is a tremendous rhetoric on the importance place on protecting and enhancing the Blockhouse. There were restoration projects done in 1984 and 1986. However, it is noted that although Parks Canada staff (working seasonally at the lock station) offer “periodic” minor repairs at the request of MDHS, there is no formal checklist for maintenance. It is also noted clearly that the MDHS “has no clearly stated role in monitoring the condition of the building.”

Even in 2007, the Management Plan indicates that there is agreement between both parties (ie Parks Canada and the Village) “to enhance Parks Canada’s presence and visibility at the site and to encourage the museum to explore avenues to generate additional visitation and revenue to support its operation.”

It is expressly clear in this document that the Village of Merrickville-Wolford has a lease on the building for the “operation of a museum” and that they are responsible (expressly noted through MDHS) “to provide a memorable visitor experience at the Blockhouse, thereby effectively conveying messages of national significance to the public as well as the place of the site within the Rideau Canal system and within the family of National Historic Sites.”

It is acknowledged in 2007 that Parks Canada will “establish a monitoring and preventative maintenance program as part of the Rideau Canal asset management program in cooperation with the Merrickville and District Historical Society” (Section 4.5.2) Furthermore, it is stated that “Parks Canada will develop (and implement) a presentation and education plan for the Blockhouse and surrounding lands in cooperation with the Merrickville and District Historical Society. This plan will outline specific directions for ensuring the effective communication of messages of national historic significance, and the provision of a memorable visitor experience in a manner that will be responsive to the needs and expectations of the diverse audiences at the site. (Section 5.5.4)

Merrickville Blockhouse Public Consultations (Jan-May 2021)

In light of the aging Management Plan (above), the Government of Canada held virtual consultations in 2021 on a Draft Management Plan created in 2020,⁹ with a view to creating a formal updated Management Plan for the Rideau Canal and the Merrickville Blockhouse.

As part of this Draft Management Plan, Parks Canada describes the inherent value of the Blockhouse and sets the vision for the next 20 years to state: the Merrickville Blockhouse remains a landmark within the Village of Merrickville-Wolford that is appreciated and enjoyed for its

⁹ The Draft Management Plan is Available for download at <https://www.rideauplan.ca/home>

historical significance in the defense of British North America, as an integral part of the Rideau Canal, and as a treasured local museum. To meet that vision, they outline their objectives to create “a renewed and strengthened collaboration between Parks Canada, the Village of Merrickville-Wolford and the Merrickville and District Historical Society in the areas of interpretation, promotion and asset maintenance ensures the Merrickville Blockhouse remains a must-see destination for visitors of the Rideau Canal.”

Specifically, the draft plan set two targets:

1. The Merrickville Blockhouse is maintained in fair to good condition in the next State of the Site assessment through regular monitoring, maintenance and repair.
2. By 2025, a dialogue is initiated to identify opportunities for collaboration in visitor experiences and marketing and promotions efforts at Merrickville Lock Station.

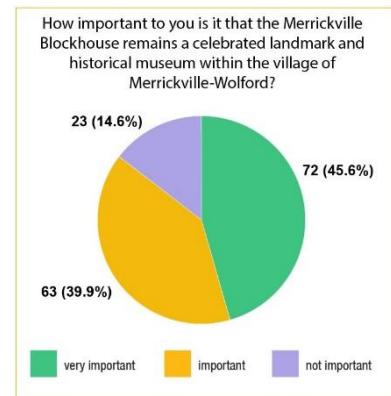
Submissions and comments on the draft plan could be sent to the government by individuals and community organizations through email, web forms and social media. However, Parks Canada also convened five virtual stakeholder consultation sessions held to solicit the views of the following groups: the Friends of the Rideau, the Merrickville and District Historical Society, Rideau Lakes Lake Associations, National Capital Commission, and the mayors of the Village of Merrickville-Wolford, Municipality of North Grenville, Township of Rideau Lakes, Village of Westport and the Township of Leeds and the Thousand Islands. The full results of the consultations and public input are available online¹⁰ and are summarized below under seven headings:

1. Cultural Heritage Conservation. Four out of five survey respondents agreed that to “protect the Rideau Canal’s engineering marvels, heritage landscapes and natural beauty” were *very important*. Public feedback emphasized that “conservation work and stable funding for maintenance and monitoring to protect cultural resources, including buildings, engineering works and lock station landscapes” was important to protect the World Heritage Status of the whole Rideau Canal.
2. Natural Heritage Conservation. Common to all public feedback was a desire to protect the natural environment and the ecosystem surrounding the canal. Particular concern was noted for the protection of water quality, species at risk, fish and fish habitat, and the fear of the degradation of shorelines and the impacts of development on lands adjacent to the canal.
3. Public Stakeholder Engagement and Collaboration. There was a strong view that there are many disparate stakeholders and multiple jurisdictional authorities for the waterway and its assets and it was felt that Parks Canada could do more to promote collaboration and cooperation with partners, stakeholders, First Nations and the general public.
4. Visitor Experience and Interpretation. There is a desire (82% of respondents) to promote greater opportunities through hiking, paddling, camping and cycling. Although there was a desire to create a “Visitor Experience Strategy” it was felt that such a strategy should be

¹⁰ Consultation Report is available at <https://www.pc.gc.ca/en/lhn-nhs/on/rideau/info/plan/consultation>

based upon the authenticity of the site, interpretation and protection of the cultural and natural heritage. Moreover, an improved visitor experience should include strong public education and quality programming, based on the history, significance and heritage values of the canal, including Indigenous history and values.

5. Regulations, Legislation and Enforcement. Local residents felt strongly that there needed to be protection of the natural environment and sufficient resources to enforce safe use of the canal.
6. Merrickville Blockhouse. Participants who provided feedback on the approach for the Merrickville Blockhouse strongly supported a commitment to strengthening relationships to support the conservation of the building, and site interpretation and programming of the Blockhouse Museum. It was felt that this commitment should begin immediately. 86% of respondents on the survey felt that it was important or very important that the Merrickville Blockhouse remains a celebrated landmark and historical museum within the Village of Merrickville-Wolford.
7. Vision. Respondents proposed that while there needs to be an acknowledgement of the protection of cultural and natural heritage resources and values, there should also be activities and visitor experiences that support a thriving economic region.



According to Parks Canada, the consultations provided perspectives that will “result in meaningful changes to the draft plan in several areas, including cultural resource management, conservation of the natural environment and the approach to undertaking stakeholder and public engagement, cooperation and collaboration.” The report concludes that the final plan is to be completed and approved by the PCEO of Parks Canada and tabled by the Minister of the Environment and Climate Change in (now presumably late) 2022.

Merrickville Wolford Official Plan (June 2021)

The Village formalized an official plan in which several key statements and objectives are relevant for the preservation and value of the Blockhouse.

The very basis of the plan (section 2.2) states “the Rideau Canal has had a significant impact on the historic development of the Village, and continues to be an important influence on its role as an arts community. The Canal is a significant economic driver for the Village and a key destination along the waterway, drawing local, regional and international visitors.” The plan goes on to point out the value of the four lock stations and the extensive inventory of historic buildings, naming the Blockhouse specifically.

One of the stated objectives of the plan, given the importance of tourism to the local economy, is “to protect, conserve, restore, maintain and enhance cultural heritage resources which include,

but are not restricted to, archaeological sites, cemeteries and burials, buildings, and structural remains of historical and architectural value, and human-made rural, village and urban districts or landscapes of historic, cultural and scenic interest.” (paragraph 2.3.2) Further to this objective, the plan affirms that “Council recognizes the importance of encouraging the preservation of buildings and properties of historic or architectural value.”(para 4.2.2). In order to act on questions related to heritage buildings—albeit mostly privately held buildings—the “Council has established and maintains the Heritage Advisory Committee (HAC)” (para 4.2.2.4). And finally, the plan confirms that “the Village will support Parks Canada in implementing the Rideau Canal Management Plan.” Which as noted above, includes the Locks, park and Blockhouse on the canal.

Interestingly, there is a provision in the Plan that “Council, in conjunction with the Chamber of Commerce, Historical Society and other interested organizations may establish a Business Improvement Association (B.I.A.), to implement an improvement plan covering such matters as signage, facades, lighting, parking, landscaping, street furniture and general maintenance.” (para 6.2.3.3, bullet point 2). Specifically including the “historical society” (by which they could only mean the Merrickville and District Historical Society) allows for active participation by MDHS in discussions about maintaining local heritage assets, including the Blockhouse.

First Nations and Reconciliation

Although there is no formal agreement in place (yet) as to the role and rights of Indigenous Peoples in the historical built heritage on the unceded land where the canal passes and the Blockhouse sits, there is a strong stated commitment on the part of the Parks Canada (and others as noted) to engage the Algonquin, Mohawk and Mississauga peoples to determine the future of the Canal and its structures, including the Merrickville Blockhouse.

The 2021 Village Official plan, when considering the management of cultural resources, also specifically states “the interests of the Algonquins of Ontario shall be considered when considering any development proposals which might impact the archaeological resources or built resources of the Village.”

Future planning for the MDHS, therefore, will likely include some acknowledgement and perhaps even honoring of those First Nations who are a part of the history of the region and the canal.

Trends Affecting Museums and Historic Sites

Museums and historical sites have been criticized as being designed to reinforce prevailing cultural norms. As one commentator put it in a 2021 blog post, “For centuries museums have told stories about a diversity of people, presenting these stories from the perspective of those in power. Thereby, museums have bolstered white supremacy, sexism, colonialism, ableism, heteronormativity, and a lot of other icky isms.”¹¹ Admittedly, although this quote was referring

¹¹ <https://artmuseumteaching.com/tag/participation/>

specifically to art museums, it presents a possible criticism of any museum featuring historic artefacts or architecture.

Truthfully, however, in this criticism lies an opportunity; by intentionally creating an “anti-museum” series of projects or activities, the message MDHS could send would possibly attract those who might not normally be interested. Tag lines like “not your grandmother’s museum” or “history presented with perspective” or even “The Loyalist weren’t the only game in town” might all offer a “gentle” provocative message that would differentiate the MDHS from the other similar sites across the region.

At a global conference of library, museum and cultural heritage leaders in 2011, the proceedings centred around the changing nature of museums, archives, and libraries. Even a decade ago, some of the leading global thinkers in this industry were starting to consider that the traditional model of protecting history and sharing information was in peril. As the keynote speaker Vishakha Desai put it: “Our job is not simply about presenting and providing quality information or quality experience. Our job now is to be a catalyst for ideas and conversations, to serve as a moderator rather than as a scholarly presenter of content.”¹²

Interestingly as technology increases globally, there is a challenge on how to use new technologies to support that developing role of moderator. As Rob Stein, of the Indianapolis Museum of Art, states: “While technology, social media, and mobile adoption influence the ways that we engage museum audiences and the expectations they bring into the museum, an attitude that invites participation has the potential to transform individual and community experiences that enhance the public value of the work we do. The real test for public value is not what the museum says it is, but rather the value attributed to us by our communities and stakeholders.”¹³

At this same conference, the working group on Learning Transformed provided a recommendation that “our institutions must adopt the new learning agenda characterized by 21st-century skills of critical thinking, of creativity and innovation, collaboration, and civility and add them to our already embedded agenda of knowledge acquisition, interpretation, and dissemination.”¹⁴

Historic sites and buildings are often expensive to maintain, especially when they’ve fallen into disuse. A report commissioned by the federal government in 1999 estimated that more than 20 per cent of Canada’s pre-1920 heritage buildings were lost to demolition over the past 30 years. 20% It was estimated that

There are organizations and even municipalities across the country who believe in the preservation and adaptation of built heritage. These organizations typically argue (or exist

¹² <http://culc.ca/wp-content/uploads/2019/10/Libraries-and-Museums-in-a-Participatory-Culture.pdf>, page 16

¹³ <http://culc.ca/wp-content/uploads/2019/10/Libraries-and-Museums-in-a-Participatory-Culture.pdf>, page 19

¹⁴ <http://culc.ca/wp-content/uploads/2019/10/Libraries-and-Museums-in-a-Participatory-Culture.pdf>, page 21

because of the argument that) investment in a municipal heritage program gives dividends in the form of increased property values, tax revenue, employment opportunities and tourism. The principle of saving old buildings from demolition simply to prevent the loss of history is no longer sufficient; there needs to be a “business case” developed to propose how these architectural relevant or interesting buildings can provide service in a modern economy.

Specific Trends from the Secondary Research

Based upon the secondary research done, the following are some of the prevailing trends that exist for organizations, both large and small, working to preserve and promote history in the region. Specifically, regular community engagement is a growing trend used by heritage sites in order to make them more relevant and accessible to the public.

They findings are divided into categories below:

Activities/Engagement:

- Virtual Tours (many using funding from Trillium)
- Online access to archives (digitized)
- School Visits and summer day programming for school age children.
- Community Events are common for the more vibrant sites, it appears (music, festivals, meetings, weddings, workshops, DIY teaching)
- Public gardens and photographic opportunities
- The combination of the historic site with the tourist information service
- Stories of “local legends or personalities”
- “Pioneer Villages” where multiple historical buildings are relocated to a central site, to create a way to walk into history.
- Accessibility both on site and off site
- Inclusion: growing attempts to connect to First Nations History
- Engagement/Participatory Education, with activities such as the following:
 - Mural wall
 - Games (trivia, contest, decorating, costumes)
 - Scavenger hunts
 - Photo challenges
 - Storytelling or re-enactments
 - Logo design/art contest
 - Façade laser light shows
 - Wine/beer/food tastings: Common to many historic locations, these public events encourage community engagement with built heritage
- Bus tours (less popular for smaller venues)
- Most groups have a dedicated website, although some are reliant on a “page” on the parent website, and others only use Facebook.

- Almost all have a FB and twitter presence...although with wildly varying degrees of interaction/posts.
- User uploaded content: Whether using an existing platform (FB, Instagram, Twitter, etc) or a proprietary website embedded platform, guests are encouraged to upload stories, video, photos, ideas for others to enjoy.
 - Example: *We Knead Your Dough*: fundraiser that encourages individuals to submit a story about bread with their donation. (Lougheed House)
- Virtual walking tours: done without sound, with a musical soundtrack, or with a voiceover.
- Videos: Featuring the current location, collection or event, or featuring historical re-enactments. Often student created.
- Audiotours: Narrated stories featuring specific elements of the historical site. Narration can be professionally done, or can be automated through text-to-speech tools. These can be available on a website or third-party application (eg. CLIO), or can be part of a mobile application. They can be free or they can be made available for a donation, or at a modest fee.
- Social Enterprise: Creating a business that reinforces the historical themes of the site, while promoting the mission. Examples might include:
 - the sale of books featuring traditional recipes or regional stories
 - Manufactured goods (jam, ornaments, furnishings, posters, etc) linked to the history/purpose, sold through an online store year-round, or a pop-up marketplace on site.

Memberships

- Almost all independent charities have a membership program. Almost all of them get less than \$5k a year from members
- Typical annual memberships are ~10-15 per adult, with discounts for Students and Seniors, and children.
- Lifetime memberships exist, but several orgs have discontinued selling new memberships.

Financials

- Financial support and/or shared staffing with County or Municipal Councils is possible, but a rarity.
- Typically, the smaller (0-1 staff) operate with an annual budget of \$30K-60K, although if they are not a charity, this is difficult to confirm.
- The reality is that most vibrant museums remain significantly dependent on grants and fundraising revenue. Earned income is often a distant second, and Admission and memberships are common, but provide very modest income as admission prices are not related to the actual expenses of the organization/museum.
- Earned revenue is not great from gift shops, but is good from special events and rentals

Admission Fees

- About 50% of the sample do not charge, or are “by donation”
- Those who do charge, only charge a pittance...~\$20/family, \$8-10 for an adult, \$6-8 for seniors/students and \$3-4 for youth. Kids are free all the time, it appears.
- Admission fees are not a significant source of revenue in any of the organizations for which I could find financial statements.

Partnerships

- Partnerships with local community businesses and funding partners are common to almost all small and medium sized museums researched in the region.
- It appears that there are several vibrant museum associations or historical societies that have managed to create symbiotic supportive relationships with municipal governments or county councils. These relationships strengthen government operational plans, and also provide space and occasionally staff to support cultural heritage initiatives. Not all of these partnerships, however, run without challenges; heritage programs, depending on the jurisdiction, can be relegated to the last priority when money is tight.
- Many museums/historic sites band together under marketing umbrellas

General

- Surprisingly only a small number seem to have disappeared because of COVID...many saw lost revenue, but they found a way to remain solvent.
- This summer most of the venues are open again (as of the May long weekend, or the forthcoming July long weekend)
- Only a small number of museums attempt to operate year-round.
- A handful have only one employee. Most have no full-time employees. Only the city owned, or the major historical sites have more than one employee.
- Summer students are significant for every site...to bolster their staffing model for the summer months. (This might explain why many close in the winter)
- Almost all in the sample have undergone a “strategic review” of some sort in the last three years.

Conclusions

The secondary market research indicates that there are great opportunities for the Merrickville and District Historical Society to increase their scope and impact as they work to support historical preservation, education, tourism and economic development in the Merrickville-Wolford region.

Remarkably, contemporaries in the heritage sector have remained alive during the pandemic, although for many they are only now appearing after a period of dormancy. During this time, many organizations have focussed on expanding their digital presence and have constricted their operations to manage costs.

Several areas of improvement were distilled from the landscape research, as below, and these concepts were then used to inform the primary research questions:

1. Increasing the scope of the historical society to bolster greater partnerships with individuals, companies, local governance, Parks Canada, and other non-profit organizations.
2. Adapt some of the innovative approaches used by other actors in the sector to attract new visitors and to promote engagement and interest in the community.
3. Consider the value of a modest admission fee at the Blockhouse.
4. Broaden the offerings of the historical society beyond the Blockhouse, to engage new audiences year-round, and to celebrate other sites and buildings of historical significance in the region.
5. Better leverage the charitable status of the Historical Society to generate more grant and donation revenue.
6. Critically review the financial benefits against the administrative burden of maintaining a membership program.
7. Actively pursue opportunities to feature and inclusive view of the region, including an Indigenous perspective.
8. Renew agreements with the town council based upon the clear shared interests highlighted in the approve 2021 Official Plan, in order to best serve the interests of the residents and visitors to Merrickville, while seeking a financially sustainable model for the Historical Society to manage the Blockhouse and other historic sites in the community.

SECTION 2: PRIMARY RESEARCH

Approach

With the information gleaned from the secondary research and documented above, Social Delta designed a stakeholder survey to solicit their opinions on how best practices from other jurisdictions can bolster the mission of the historical society, and specifically the Blockhouse as a cornerstone of both the community and the historical society.

The survey was prepared with 15 questions to clarify specific expectations and opinions of local MDHS stakeholders. A link to the online survey was individually emailed to over 100 addresses of volunteers, members and supporters, and was also circulated to members of the local Chamber of Commerce. The questions asked on the survey are attached as Appendix B.

Over the course of two weeks in July 2022, 108 individuals started the survey. Of those, 73 completed all questions, and those who completed the whole survey spent an average of 13 minutes offering their thoughts.

Note that for questions in which respondents could choose from multiple responses, the responses were randomized to prevent selection bias based upon “the first response they saw.”

In the summaries below, some responses have been edited for brevity, spelling, or clarity. If the graphic labels are not clear, refer to [Appendix B](#) for the full text of possible responses.

Response Summary: Society Purpose

Ninety-eight percent (98%) of respondents believe that it is necessary to preserve the built heritage of Merrickville-Wolford. This overwhelming support for the principle of the Heritage Society demonstrates a modest selection bias, but it is important to note that the subsequent responses were provided by individuals who overwhelmingly support the mission of the organization.

The subsequent question asked respondents for how they'd like to see the history of Merrickville-Wolford celebrated. The following list documents the responses (combining similar ideas):

- Through its unique architecture and signage.
 - More designation of buildings
 - more focus on heritage buildings
 - On the village website, perhaps also a paragraph on the village map, or notations showing buildings of historical significance.
 - heritage recognition of the community and area

- Old buildings restored and maintained, continued investment in St. Lawrence Street
 - Plaques on buildings
 - Protection with by-laws and financial assistance for the up keep of heritage buildings
 - Try to keep the ambiance or 'feel of the town of old' but blended with modern days that does not take away from the past.
 - Restoration of some of the historic buildings and businesses along the canal near the ruins.
- ANNUAL community celebration, suggestions included the following:
 - picnic w/music & history presentation
 - a Founder's Day
 - "History Day". It should be done "warts and all" not just the Disney like events. Not all the historical figures were really "nice" people all the time.
 - Heritagefest; the history of Merrickville-Wolford should be celebrated at every opportunity presented. We are after all the Jewel on the Rideau: all business and services help in the branding
 - Historical re enactment?
 - Part of a Heritage Canada sponsored initiative?
 - A special weekend celebration
 - A festival commemorating the founding of Merrickville Maybe every 10 years
 - Return of Canalfest and other such events
 - A week/weekend dedicated entirely to the celebration of our history. Events could include a play(s) or re-enactments of moments in time that are historically significant.
 - Incorporating historical events popular at the time of our village coming into being.
- Festivals, speaker series, events
 - Static displays are useful, but visitors benefit much more from the presentations made by guides
 - Map/walking tour of historical sites. We had explored a virtual tour/augmented reality with historic photos seen through the phone when observing modern realities.
 - Blockhouse open for tours
 - Festivals, lectures, art, museum, books
 - In participatory community events that include local people of all ages and backgrounds. I am tired of returning to a "quaint, colonial, "little house on the prairie" costumed interpreters.
 - Preservation and education
 - Celebrate important events from the the past celebrating the day

- Vendors/shopkeepers in Victorian costumes at a summer festival perhaps or at the Christmas festival
 - Regular columns in Phoenix
 - Exhibitions; re-enactments, workshops on historical arts & crafts, plays with a historical theme
 - Continue the winter lecture series
 - Heritage Days.
 - Monthly speakers' meetings
- Continued use of Blockhouse Museum, in conjunction with operation of Rideau canal, the Merrickville fair and other individual celebrations such as 1st of July.
 - Return to what was done prior to Covid
 - Through the Blockhouse and maybe a festival that includes the Blockhouse and the park
 - Ensuring the Blockhouse remains an enduring symbol of the Village history and is communicated to residents and visitors
 - MDHS to continue the Blockhouse Museum
 - Through the block house, public art and theatre
- Increased General Awareness activities:
 - More written history collected from the very few elders still living, myself included...
 - Easy access to historical information as well as indigenous history
 - Permanent displays open to public, information/news in local papers to sustain engagement
- Specifically new ideas:
 - Bring back the town crier.
 - Greater focus on industrial/commercial success, less on military etc. Merrickville's built history is due primarily to the enterprise of its early industrialists who built it.
 - A dedicated museum space that could serve as a museum to teach and celebrate the history of Merrickville through a permanent collection of artefacts as well as subject specific exhibits.
 - More public art.
- With the full cooperation, financial support and leadership of the village council.
 - Greater recognition, acknowledgement and financial support by municipal government of the importance of historical record and infrastructure and of the contribution of the MDHS in particular.

It is interesting to see the enthusiasm for festivals and events held on the Blockhouse site, and for the keen interest in preserving other buildings in the region and in educational initiatives.

Ninety-six percent (96%) of respondents agree that the Blockhouse is an important visitor site in Merrickville. Only two percent (2%) felt it was not, and 1% did not have an opinion. The subsequent questions asked respondents to clarify why they felt that the Blockhouse was/was not important. The summary of the responses can be found below (again, common responses have been grouped):

- Draws Attention and celebrates the town's history:
 - The Blockhouse is a visual landmark that draws attention. It is centrally located in the Village with accessible parking. It could house/be a backdrop for interesting programming.
 - UNESCO World Heritage Site
 - How many other communities in eastern Ontario have a blockhouse in its downtown?
 - Its physical presence represents a significant part of the history of our country and should be preserved
 - Part of the history of M-W located in the centre of the Village
 - A big piece of local history
 - Most noticeable landmark. Iconic
 - It is a National Historic Site in Canada and part of UNESCO World Heritage Rideau Canal. It is a unique draw and many visitors like built historical things.
 - Represents an important part of the history of Upper Canada AND it is located right here!
 - The site of a museum reflecting the history of the blockhouses and the canal is a key visitor information piece to our heritage.
 - It is a big part of Merrickville's history and it is well preserved.
 - As a past volunteer during the "shoulder" portions of the tourist seasons, I can say that simply looking at the visitor's book shows visitors from around the world.
 - Historical, structure, information anchors the village
 - The historical significance of the blockhouse and the artifacts located there are an important link to the community from the past
 - It is a very visual representation of the history of Merrickville and the Rideau Canal
 - Central location which depicts the history of the area and founding of Merrickville-Wolford
 - Physical reminder of the life and times of settlers to the area to ensure future generations appreciate what they have. The building itself takes up a significant portion of the Village core.
 - It speaks to the importance and heritage of the reason for the village. It is a visible example.
 - It represents an historical part of the past and is unique to this town.
 - It is the central heritage point of the village and the only heritage structure open to all.
 - It is a focal point — and a natural location in the heart of the Village

- It's the central focus of the village, and everyone knows where it is. Even visitors can find it easily.
- It is a museum of Merrickville's past.
- It provides visitors with a unique view of not just Merrickville but Canada's past.

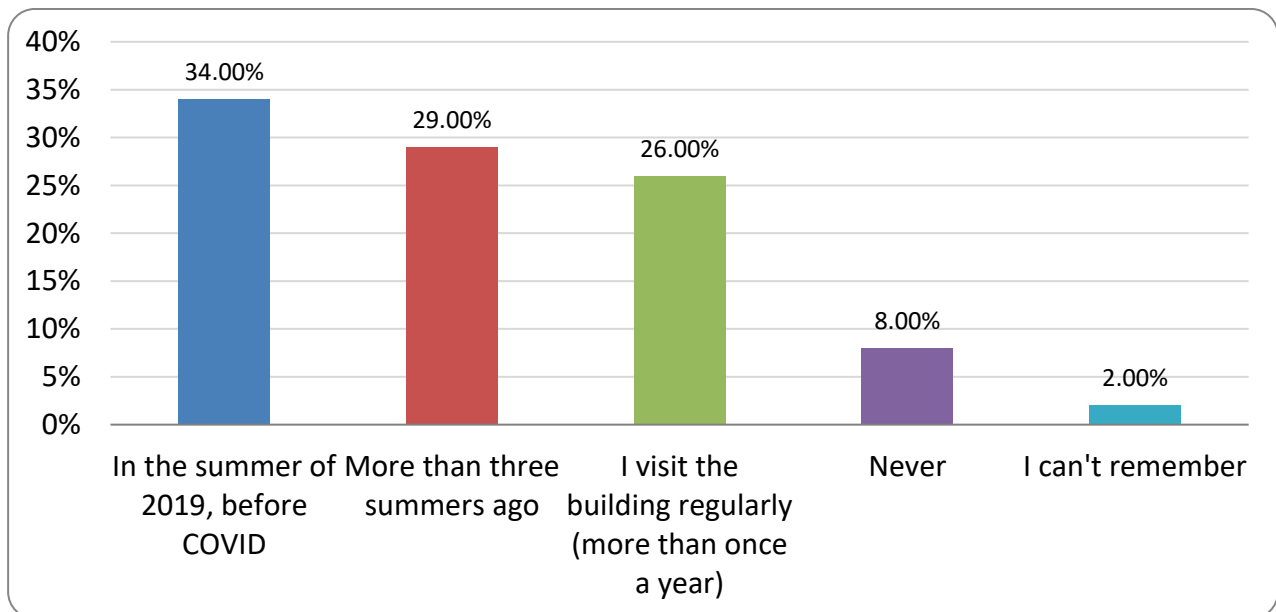
- Canal's History:
 - It is a connection to the birth of canal, to the roots of our community
 - Important part of the canal's history and the region's development
 - It can be used to represent/explain the reason for the canal. Many people do not understand that the USA did attack the colonies. Especially new Canadians.
 - The Blockhouse itself is not important, the significance of the canal that it guards is the story.
 - Location next to Canal and Locks, historical significance, original intended purpose and its eventual actual purpose.
 - Visual indicates purpose of building and canal, provides a symbol that best represents the village.
 - Allows student and other groups to educate themselves and understand the history of the Rideau Canal.
 - One of a kind to teach us and visitors about the War Of 1812
 - Although it served virtually no military purpose it acted as the first home for Lockmaster John Johnston, and his family for 20 or more years.
 - A symbol of our struggle to be independent of the USA
 - It relates directly to the reason for building the Rideau Canal

- Architectural interest:
 - It is a leading example of early 19th century colonial fortifications, and anchors the history of the village
 - Few Blockhouses are as well-preserved along the Rideau, and it's iconic to the branding of Merrickville.
 - It is a distinctive building at the major crossroad in the village.
 - Heritage site - important to preserve
 - It's an important heritage site for the village
 - Historically significant and frankly interesting
 - great historical site
 - It's unique, historical, located right beside the water, and just cool
 - Presumably of architectural significance.
 - The likes of these buildings (as well as the barns) will only fade with time if they are not upkept and preserved.
 - It provides a window into a specific time in history

- Grounds/Recreation
 - It is also next to a pleasant park and the canal
 - Great place to gather and spend time together

- Community Economic Development
 - it's unique along the canal. It keeps visitors in the Village longer which encourages stops at stores and restaurants. its a defined stop within the Community
 - The blockhouse attracts visitors to the village for all good reasons
 - proximity to the canal, tourism attraction
 - People love historic buildings and it attracts visitors and tourists
 - Because of its location and unique architecture - it could act as a focal point for many historical related activities
 - It is a wonderful historical site that does bring in a lot of tourists to the
 - Many people come to shop, but they also want something non-commercial, meaningful, instructive. Especially if they have kids or older adults. And boating tourists in particular appreciate it.
- Why not:
 - Never been to it or inside it -lived here since 2007
 - Should be open 7 days a week-during the peak visitor season, being visible from many sight lines.
 - It is not an attraction or a draw, it is a site that may be visited incidentally, but rarely as the purpose for a visit to Merrickville,

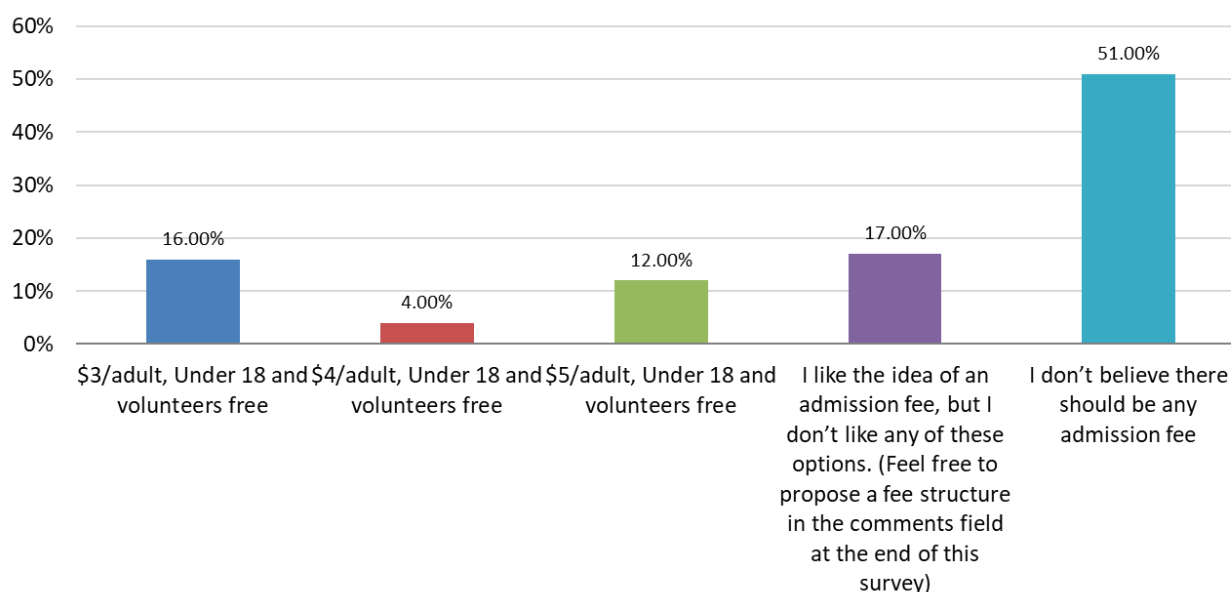
When asked when was the last time that they visited the Blockhouse, it was notable that 90% of respondents had visited the Blockhouse, and the majority have visited in the last three years, even given the closures and public health restrictions related to the COVID pandemic.



Response Summary: Society Funding

When asked about admission fees for access to the Blockhouse as a means to generate revenue for the organization, the response was very much in favor of keeping the museum access free.

If the Society were to go against the majority and charge an admission fee, the preference appears to be for a modest fee of \$3 for adults. Many respondents, in comments found subsequently, or in other subjective responses suggest “admission by suggested donation.” It is plausible to assume that the 17% of respondents who did not like the “options presented” would be likely to have suggested a donation in lieu of admission fee. Comments provided in subsequent responses suggest that there is a fear that charging an admission will decrease the number (and the diversity) of individuals who would visit the Blockhouse.



Social Delta, from experience working with multiple historic sites across Canada, concludes that admission by donation always results in less total revenue. However, if the admission fee is zero (or by donation), then it is possible to garner income through tours, special events, sales of souvenirs or through other income generating activities.

Respondents offered some suggestions about offerings that might warrant an admission fee (or some used this opportunity to lobby against an admission fee), as follows:

Regarding fees:

- I like the idea of suggesting \$5.00/person donation for entry but leaving some flexibility for families. I wouldn't want anyone NOT to come because it required admission. Some

people come and spend 5 minutes in the building (they clearly do not have a \$5 experience) and there are others who chat with volunteers and are there for .5 hour. They should be encouraged to pay \$5.00/person if they have had a meaningful experience.

- I believe that admission should be free.
- So few things are free anymore; our guests to the village should be encouraged to interact freely with our town's history. Perhaps a donation box with \$2 requested fare?
- I think that the Blockhouse is more likely to get donations for more than what an admission fee would bring in if there is not a fee. Further, having no fee allows people to come in and out several times in a day without fuss, allowing it to be a drop in place as well as a museum.
- Voluntary. Suggested donation: \$3
- It should be voluntary with a suggested fee structure i.e. adults \$5, families \$10, seniors \$3
- A small admission fee should help cover basic maintenance fees and help offset any suggested improvements (I cannot think of any at the moment).
- perhaps a donation instead of an allotted fee
- I think it should remain as it is on a donation basis. All of the artifacts have been donated. The students' salaries are covered by grants.
- Not sure¹⁵
- A fee is necessary for building maintenance and artifacts/displays repair and storage. Off-site storage is also an expense needed for extra donations. Perhaps a "Friend of the Blockhouse" annual fee could be initiated for repeat visitors.
- As it stands now, I do not think an admission fee is justified given the current exhibit.
- Admission fees can perhaps be somewhat prohibitive to families with small children, not everyone has cash and a debit machine would require further expenses to the Society. What cash people do have could be hopefully provided to the society in the donation box. Perhaps the blockhouse volunteers/students could promote this option.
- No admission fee but install signage asking for donations to preserve the building.
- NO FEES !
- I do not believe anything warrants a fee. If there are good tour guides that personalize tours then more money is given as a donation and people go away with a better experience.
- fee not warranted
- This is our common heritage. It should be free. By donation only. Admission fee should ONLY be charged for special events in order to pay for special historical presentations or demonstrations.

¹⁵ Social Delta has included a category for those who responded "not sure" or a similar sentiment, such as "N/A" or "no comments," "no," or "nothing." Responses such as these suggests (perhaps) that there is nothing evident that could be done to legitimize charging a fee. It is possible that these responses only indicate that the respondent didn't have an idea, but if they had no ideas, they could have simply not responded and left this question blank.

Regarding income generating ideas:

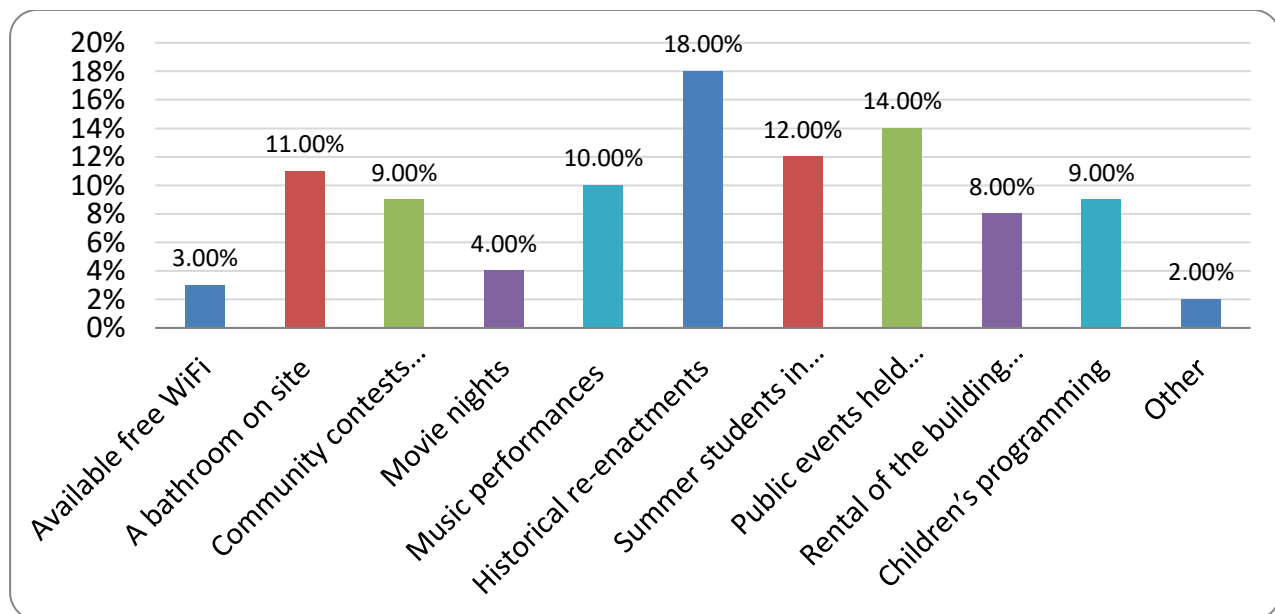
- Why not access Canada's heritage sites like transit Presto passes? Putting a specific fee per site assumes people know the story - they don't. The strategy should be to encourage visitors to get to see as many sites as possible just like encouraging people to use the transit system. We know the Presto passes work - why not adopt successful approaches.
- Parks Canada should recognize its importance and finance it completely, except for donations
- Funds should be raised through other means, e.g. merch sales, govt grants, fundraisers.
- Get a sponsor i.e. RBC

Changes required to legitimize an admission fee:

- Guided tours, re-enactments, gift shop
- The signage. All of it should be in English and French.
- Year-round access, interactive exhibits
- Public toilet inside
- A longer operating season, and well-trained, informative staff to guide and inform visitors
- The displays could be switched up more frequently. There could be ad hoc re-enactments. There could be interactive displays
- Lighting and warmth... power point images of the significance/history of the building... a change of displays throughout the season
- more artefacts, A/V presentation, hand-on exhibits
- Guided tour or audio self-guided tour
- More up to date displays. More inclusive. More interactive displays. a bathroom!
- Can't answer that without revisiting however a lot of the items in the Blockhouse should be more representative of Merrickville-Wolford
- An information take-away as well as guided tours.
- Rotating exhibits or dancing girls. What can you afford? Increasing donations would seem to be the only way to go.
- Would need to have a better layout with information. The audio play is good need more graphics. More engaging staff to discuss or tour people through the items, discussion and link to other locations in village.
- Weave the significance of the Blockhouse into a bigger story - it is not a destination. It's only a page of a bigger story
- Guided tour in historical costume
- Upgraded exhibits. Maybe projections inside would be cool.
- A video interactive presentation giving details of why the blockhouse was built and how the village was at that time
- I've never had or been given a reason to go in it...I'd say it needs to hold more interest. I honestly know nothing about it, have never seen activities with it etc.
- Hands-on experiences. Bring in a weaver, a blacksmith, horse and buggy rides.
- Music

- Active guides and events such as lectures.
- I don't feel like there needs to be any improvement to the Blockhouse.
- Multimedia; short videos, audio recordings explaining what visitors are seeing as they tour the building.
- Running water and washrooms, food, videos, more staff - better exhibits
- Specific events that would draw residents and visitors to participate - e.g.. a workshop on quilt making, working iron, etc.
- Volunteers in period costumes actively engaging the public, short 6-minute heritage moment plays every hour on the hour by local theatre group
- Are the people working in period costume?
- Better signage: and promotions: I.e., the most unique Museum on the WHS Rideau Canal in Canada's Prettiest Village, etc.
- Bbetter video presentation outlining why the blockhouse was created
- More displays and interactive period demonstrations both inside and outside the blockhouse.
- Interactive displays or workshops
- If an admission fee is deemed necessary then perhaps some type of interactive audio-visual program should be installed to bring the younger people in, and allow them to spend time inside the Blockhouse.

The following table outlines the survey data in response to the question about which of a series of activities and amenities offered by other contemporary organizations do the respondents feel would be “most effective at attracting guests to the Blockhouse?”

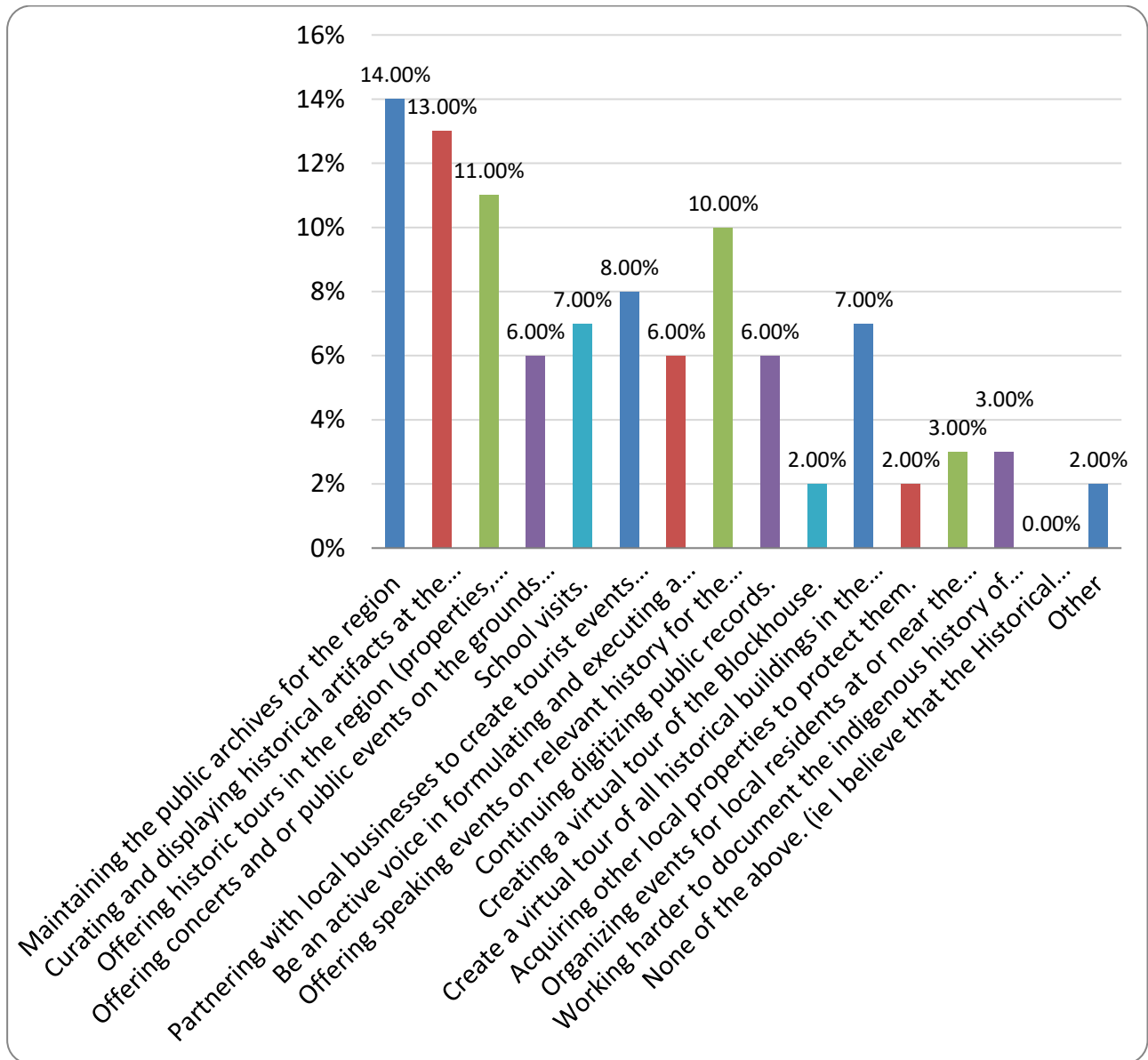


Surprisingly, respondents felt relatively strongly that historical re-enactments, staff in period costume, and a range of public events held at the Blockhouse would be effective ways to attract

visitors. Of course, having a bathroom on site also was a practical “attraction.” Surprisingly, available WIFI and movie nights were not seen as significant ways to draw in crowds.

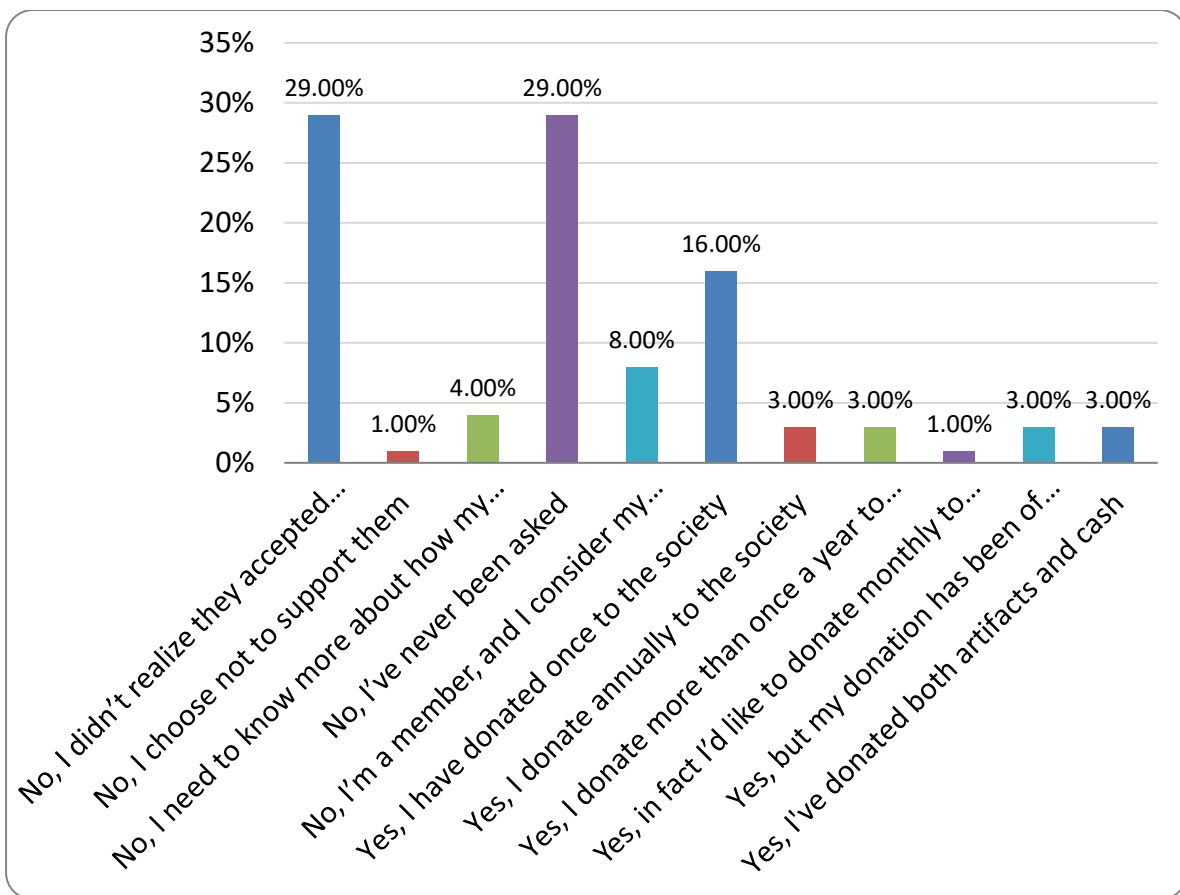
Response Summary: Society Future

The next set of questions on the survey were designed to get in put from stakeholders on the future of the MDHS. The very first question invited respondents to offer their opinion on what should be the five main activities of the Merrickville & District Historical Society. The results were tabulated in the following chart:



The top four were, in order of preference: to maintain the archive, to continue to display artifacts and the Blockhouse, provide historic tours in the region and offer speaking events on historical issues. These activities, perhaps not surprisingly, form the core of the existing work of the Society. However, the next “tier” of recommendations includes new ideas: school visits, tourist events with local businesses, and the creation of a virtual tour of local historical sites. Interestingly, the ideas which garnered the least interest were creating a virtual tour of the Blockhouse and acquiring other historical properties. The latter is perhaps obvious as there would be a significant cost to those acquisitions, but the stakeholder response suggests that a virtual tour should be of the whole built history of the region, not simply the Blockhouse.

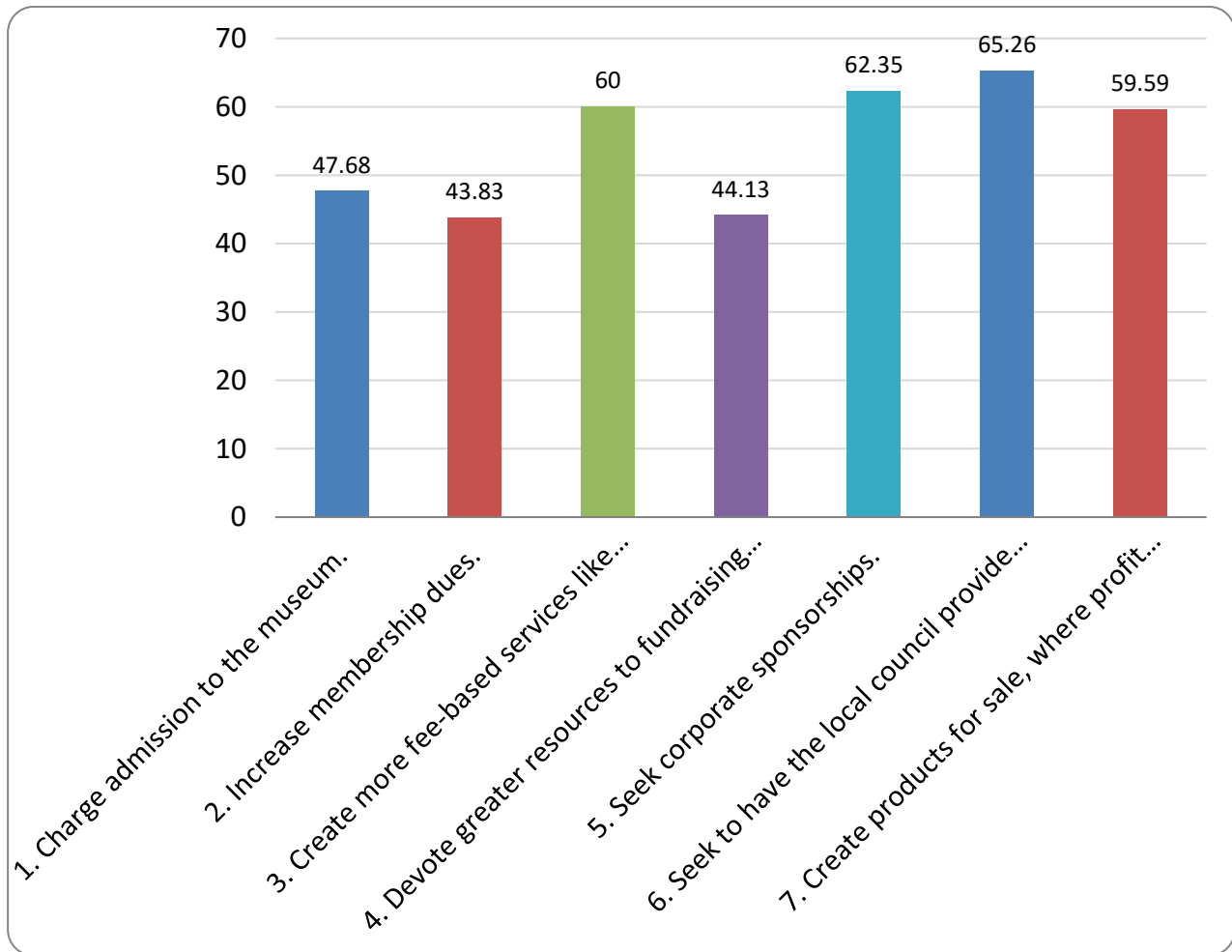
Just over half of the surveyed group are or have been a member of the organization. However, that means that 45% of the respondents have never been a member (with a further 1% not sure if they’ve ever been a member). This suggests that in spite of 98% supporting the work of the Society in principle, almost half have never become members. This finding suggests that the membership program is either poorly marketed, or it doesn’t really appeal to almost half of those who are supportive of the work of the Society.



Perhaps even more telling is that of the surveyed respondents, almost a third (29%) were not aware that the Society accepted donations of cash. A further third (29%) were aware the Society

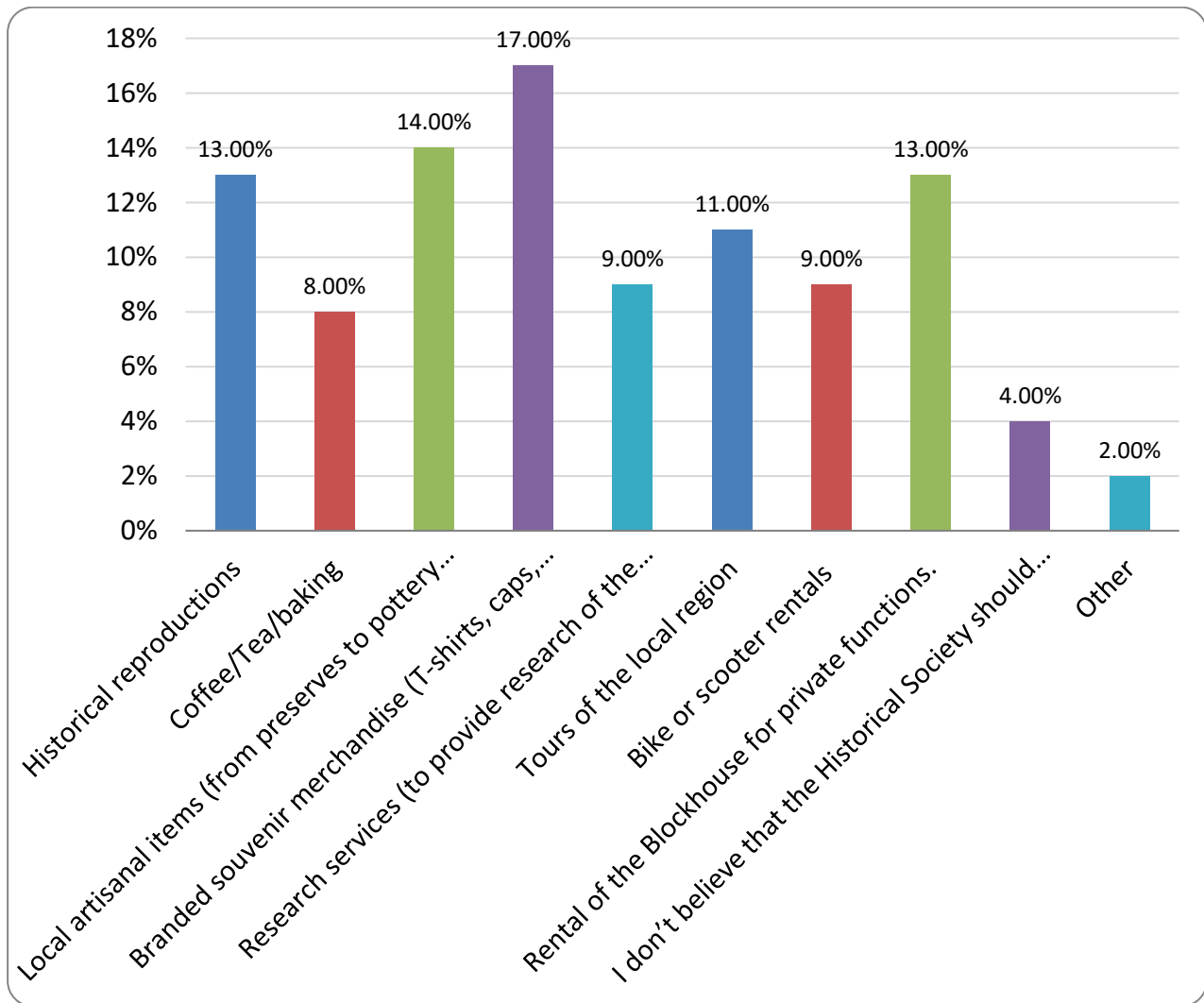
was a charity, but had never been asked for a donation. Only 6% indicate that they donate one or more times a year. These findings suggest that there is tremendous opportunity to seek private donations to support the work of the Society. (Social Delta notes that, in fairness, only 1% indicated that they would “like to donate” but that figure is likely too low, as respondents were asked to choose only one of the options presented, and if 60% didn’t know they could donate, or were never asked, then 60% would be unable to choose the “I’d like to donate” option. In fairness, this is a flaw in the survey design, as there perhaps should have been a subsequent question asking only if the respondent would be willing to donate...)

After asking about donation history, the next question asked the audience to rate the strategies they would recommend for the MDHS to seek operating revenue. This question allowed each respondent to rate each revenue source on a scale of 0-100. Ironically, charging admission was seen as a significant way (48/100) to generate revenue, which conflicts somewhat with the earlier finding which suggested that many did not support charging an admission fee.



Nonetheless, the ideas that garnered the greatest support were split between two options: one was a social enterprise approach¹⁶ of designing more “fee-based services” or creating products for sale; the second set of ideas that were seen as worth pursuing were to seek financial support from the corporate community and from the local council.

Interestingly, amongst the least practical approaches were increasing membership dues and increasing fundraising activities. (Having note this response, Social Delta believes that the strong *in principle* support for protecting the built heritage would lend itself well to a fundraising campaign to engage the whole community in protecting and running the Blockhouse and supporting other aspects of the Society’s work. (both current and proposed)



¹⁶ A social enterprise approach uses the sale of goods and services to generate revenue to support a social mission.

Given that there was an endorsement of employing a social enterprise approach, the next question is more salient than initially considered. The previous chart documents which product categories that might be sold by the MDHS should be considered.

Three of the product categories that were most endorsed were items that one might find in a gift shop: historical reproductions, artisanal items and souvenirs. The next “tier” or products deemed suitable for sale were services: Blockhouse rentals, tours, research services and bike/scooter rentals. Perhaps notably, very few respondents categorically felt that the Society should not be selling goods or services.

The second to last question on the survey asked for suggestions of potential partner organizations for the MDHS. The responses were provided in a narrative format, and have been summarized below, with likeminded comments grouped together:

- Networks of other historical groups
 - MDHS might consider banding together with other historical groups, cultural entities or municipalities to pool resources to share access to a paid resource person. While it may be unrealistic for MDHS to have paid staff, sharing access to a shared full-time resource might ease some of the time-specific activities (eg grant writing, occasional updates to websites, regular social media postings, returning phone calls, etc.) that require turn-around to maintain engagement with stakeholders
 - Create a regular and cohesive network with historical societies and museums in nearby municipalities, as well as genealogical societies;
 - Perhaps the Ontario Historical Society could provide advice and guidance drawn from the lessons learned from its members. What about a link with the Bytown Museum in Ottawa, or the Ottawa Museums Network? Could the National Trust for Canada be a useful partner?
 - Partner with Upper Canada Village and other historical museums in the Lanark, Leeds, Grenville area.

- NGO’s and Civil Society Organizations:
 - local churches, schools
 - Library
 - Merrick Preparatory International School, Mrs. McGarrigle's, local library, local theatre guild, Ottawa Tourism bureau, re-enactment historical players, university campuses nearby, other private schools.
 - collaboration with all other local organizations
 - Could work with MAG to solicit artists/artisans to display and talk about their work - especially if there is a historical context
 - Museum trail with Smiths Falls Museums and others maybe the Delta Mill or possibly Watson's Mill. Work with the History Hub in downtown Kemptville

- Library, neighbouring historical groups
- Local non-profit groups should be approached with a clear outline of the needs of the historical society
- Leeds County has a heritage network that brings together every type of organization to promote heritage, share ideas and personnel, to coordinate across the county. Current example a joint area to showcase our organizations at the Ploughing Match in Kemptville. This helps with exhibits and costs.
- Service club (i.e. Lions Club)
- Legion

- Business:
 - Active participation within the Chamber of Commerce, (received at least seven mentions, including a suggestion that through the Chamber the Blockhouse Museum becomes part of the local festivals). One person notes: “already a great relationship with chamber of commerce should continue”
 - Enbridge,
 - Bell,
 - ON Hydro
 - RBC
 - Local merchants
 - Local artisans and business owners

- Local Council/Government
 - A high degree of active collaboration with all other local organizations, public and private. I do not believe it is realistic to have a volunteer group with an essentially academic / cultural interest be successful in a sustained way at operating as a quasi-commercial organizing entity. One idea is to have the Blockhouse formally made a community asset of the Village run by an "office" of the Village operated by volunteers from various community organizations like the Historical Society
 - To increase funding request annual funding from Council
 - Municipal govt needs to work harder to recognize and promote its historical assets, incl MDHS, blockhouse, archives etc.
 - Municipal heritage registry
 - Heritage Canada and Parks Canada,
 - Closer cooperation with RTO9 (Social Delta note: RTO 9 is the regional tourist organization, with details at <https://rto9.ca/>)
 - Parks Canada, The Federal Government and the Municipality all could do MUCH MORE to support THEIR LOCAL HISTORICAL STRUCTURES AND INTEGRITY. It should not be on the backs of volunteers or private investors to maintain the legacy of this country and the valued artifacts of our heritage.
 - Ottawa's historical Society, Canadian Historical Society, Heritage Canada

- Other suggestions to build partner networks:

- More advertising for support.
- A public awareness/promotion program would attract more visitors/members.
- Actively seek public donations
- Sell cemetery maps. People come to research family trees and do "tombstone rubbings" so local cemetery maps would sell well.
- Be more involved in the educational programming in the schools. The elementary students do a strand on settlers and pioneers.

When asking for thoughts on partnership ideas, many respondents indicated that they had “no idea” or had “nothing to offer here.” This suggests that developing robust partnerships may require some further thinking and critical analysis by the Board of Directors. However, it is clear that there are some key relationships worth pursuing: the Council, the private sector, other local NGO’s and colleagues also working in museums and at historical sites.

The final question invited any further comments, and these have been summarized below: (some lengthy submissions have been separated to make clarify different ideas)

- MDHS need to create quality products (an updated walking tour, an accurate "history of Merrickville-Wolford" webpage and display in the Blockhouse Museum, a "standard of research" statement to guide expectations of those who approach MDHS looking for "answers" to questions about history, heritage, genealogy, how to research their house, etc.
- The "flimsy-ness" of the history given to summer interpreters and just makes MDHS look unprofessional. MDHS needs to say what it knows (and what it doesn't) and make it seem credible.
- In addition, if MDHS were really interested in history and heritage, it would commission solid research on a number of topics that it doesn't have the skill set to generate (indigenous history, built heritage, M-W in the 1950's - 1970's, queer history, natural history, crime and punishment, abortion, poverty, etc.). This would result in thought-provoking text for websites, grist for exhibitions, speakers for lecture series, etc. that could mirror contemporary issues
- Encourage the younger people in the community to get involved. Get the message out that there is an Historical Society.
- Invite the homeowners of designated buildings to attend a lecture or have an event catered for them.
- The historical society seems to be 65% focused on the blockhouse and 34% on the archive. There needs to be an effort to look at best other practices across similar organizations AND expand the mandate to include active support for designated heritage buildings
- Try to keep alive village traditions like our Canada Day parade and the nativity walk on December 24th.
- I think that the Blockhouse needs more interactive displays. Pretty much everything there has a 'don't touch' sign on it. If there are no originals that can be touched, perhaps a

reproduction can be acquired that visitors can 'try out', such as a butter churn or laundry tools.

- Many of the signs in the Blockhouse describing what an item is can be difficult to read, perhaps they can be enlarged. The collection may need to be reduced somewhat, but perhaps different items can be rotated through on different years so the overall display is not so static.
- It would be a cool place to offer themed "escape room" events.
- Modernize with projections inside the blockhouse.
- I praise the Historical Society for their efforts and thank you to the members of the Merrickville Historical Society for your dedication to the past and present and this initiative to ensure the proud history of our community will continue.
- A fee to enter should be small - \$2.00 or not more than \$4.00 - vacationers do carry small amounts, so this would pique their interest to enter and peruse.
- Off season, monthly meetings should be local speakers, who can spark the interest of newcomers about the local history and activities. I know, I have done it at least four times over the past twenty years.... Sample: why is there a "dog walking track" at the Fair Grounds - it was a horse racing track at Fair time, going back to the early 1900's or - there have been four ice rinks over the years, ask the locals!
- Re admission: prefer donation based using a tap system with pre-set amounts.
- When providing a donation, a "keepsake" (bookmark or similar?) could be provided.
- Recent tourism study indicates a strong preference towards experiential visits. I believe this would add to the values offered by MDHS. Some of these don't need to be at the Blockhouse. A historical re-enactment of plowing fields or harvesting could be another example.
- The only ways to improve would be to get more involvement from individuals or to obtain a more structured funding/program from the federal/municipal end. This could come in the form of creating a program which feeds into grant funding, having a serious discussion with the municipality / federal / provincial government or simply seeking private / corporate investors that would be personally interested in supporting and assisting the Blockhouse and Historical Society. They are surely out there but you would probably have to do a lot of networking to find them! Perhaps it's as simple as asking, or perhaps they would want to develop advertising partnerships or programs run through or with the Blockhouse.
- There are many cultural grant programs at the federal, provincial and foundation basis - to what extent is the Historical Society actively pursuing grant opportunities?
- So important to connect with the next generations for now and the future through school-based activities, summer day camps. If they learn and enjoy, they will bring their families to visit or for events.
- Start up a local historical promotion program to advertise local history, places, events and Society services (archive retrieval, rental of Blockhouse, sell of products, etc.).
- Does the MH Society have a Facebook site?

- Contact the RTO9 tourism people to advertise the Blockhouse and Merrickville's historic locks.
- Ask the public for local historic artifacts and donations.
- Put an ad in the Phoenix to attract more members and engage the public to help out.
- Create and promote local historical events at the Blockhouse and Depot (i.e. how about a Harry McLean day with promotional selling products and sponsorship through the Council and the Professional Engineering Association of which Harry was an executive member).
- Keeping the MH Society alive and ensuring that the Blockhouse and Depot remain open to the public is critical to preserve history and attraction tourism. Keep up the good work!
- Convince the business community that tourists are not attracted because of cute shops or French fries, but for the attractiveness and uniqueness of its history; the business community should support the efforts of the MDHS to promote that uniqueness.
- Make every effort with government agencies for support.
- **SPEAKER EVENTS @LEGION**
- Focus on historic involvement of volunteers— this has lacked in the last 5 years!
- Maintain core mission: Blockhouse Museum and lecture series. Do NOT get involved in offsite activities— it is NOT the role of the MDHS to be involved in tourism strategies.
- A program of (probably irregular) presentations about various notable structures (buildings) within Merrickville and, as well, aspects of its industrial heritage
- Council should create a heritage and historical advisory committee which is LISTENED TO and whose advice is SOLICITED AND RESPECTED.
- Council should join with a few other councils to sponsor a collaborative governance meeting for nearby local historical societies, archives, museums, tourism reps to meet together towards helping each other prosper through combined advertising, economies of scale in purchasing of merchandise, combined organization of fairs or events etc.
- Local theatrical groups or school theatre classes should be approached to see if they would be willing to animate the blockhouse from time to time, bring to life a particular historical personality from the area, costumed and rehearsed. Might this be of interest to them?
- MDHS has to get out into the community a bit more. I know this is demanding of people's time and effort. North Grenville now has a "storefront" location, thanks to the municipal government's help.
- The volunteer base has been eroded before and subsequently during Covid. This needs to be boosted, to encourage people to join for the sake of the historical aspects of our community. It's difficult to sell Merrickville as an historic village when the residents don't understand how the village developed. With the increase in housing and therefore population, this needs to be built on, whether by public information lectures or summer camps for children. The camps for the kids would be a great way to inform and develop at an early age.
- Rather than an admission fee, have a donation box in a prominent location with an information poster and/or video on what the Historical Society does in and for the Community.

- In partnership with the local chamber of commerce it might be a good idea to put together a welcome package for new residents or for other functions that explain the history of the village and key figures and industry in the Village This could include discounts to local shops and restaurants.
- It would be nice to have a virtual guided tour of the village or an app that can walk you through interesting locations and provide you with some history and funny facts from Harry Maclean and other figures. Or even a paper map of the historical sights and businesses in and around the village.
- Possibly seek engagement with the BR 245 Legion?

SECTION 3: PLANNING CONSIDERATIONS

Going forward, the Merrickville and District Historical Society might wish to consider the following to help maintain the organization and expand its work to serve the community.

Incorporation Recommendation

There is no need to change the incorporation of the Merrickville and District Historical Society. As a non-profit organization registered as a charity, the legal structure is ideal for community ownership, the ability to accept grants and donations—for which a tax receipt can be provided to individuals and businesses, and to encourage voluntary service. Moreover, it is unlikely that the Society will ever exceed 50% of total income through the sale of goods and services, and therefore any income generating activities are not likely to contravene the Related Business Clause of the Charities Act.¹⁷

Governance Recommendations

The board of MDHS needs to expand to reflect the diversity that exists within the community. There needs to be greater representation from business, local non profits, the Council, youth, and from the First Nation's communities in the region. The board need not be huge, but the voices of all who see value in the preservation and promotion of the history of Merrickville-Wolford will help to generate greater resilience in the Society.

Current board members have strong backgrounds in archives, historical preservation, and local history. These are valuable and important skills and interests to bring to the governance of a Historical Society. However, it will serve the organization well to have representatives from many stakeholder groups be part of the active discussions on strategic choices for activities, investments, and income generating opportunities for MDHS.

Many organizations with a mandate to support local history are provided financial support, working space and often a representative on the board from a local municipality. Although historically, the link has not successfully been made between the economic health of the community and the importance of the historical sites (especially the Blockhouse), this link is much easier to understand when civic employees or elected representatives are part of the governance structure of the historical society. Naturally, the attraction of the historical character of Merrickville (especially, but not exclusively the Blockhouse) also supports local business, and therefore the voice of local business, either from the Chamber of Commerce or from individual business owners would also serve to strengthen the governance structure of the organization.

¹⁷ See [Appendix C](#) for more information on the Related Business Clause and how it affects charities seeking to sell goods and services in support of their mission.

Staffing Model

The MDHS will remain a lean organization with significant volunteer leadership and operational support until sufficient resources are made available to hire a staff member. Having said that, there are limits to growth without a paid staff member, and contemporary organizations that are thriving typically have 1-3 staff members to provide daily operational leadership, community engagement, fundraising and planning support.

The model to consider for MDHS, based upon the success seen in other jurisdictions, might well be to “share” a staff member with a library, a collegial community organization, or the municipality. Initially, that staff member might work full time, but only a portion of their hours each week would be devoted to MDHS. Nonetheless, they would be able to answer calls, solicit charitable donations, write grant proposals and reports, coordinate volunteers, oversee the hiring of summer staff, communicate with the Board, and organize year-round events like lectures or community challenges or activities. (See [Appendix D](#) for a sample job description)

If there is a significant event (such as an annual festival, a theatrical performance, or a video production) it would be assumed that a contractual staff person would be hired based upon the grants and/or revenue generated to support those discrete activities.

It may be self evident to state, but any expansion of the work of the MDHS that might be recommended in this document will require extra staffing hours. If these can be met through increased volunteer engagement in the short run, that would be a temporary solution only. Any broadening of the work of the MDHS will require at least a part time paid staff member to coordinate the work that the Board of Directors approves.

Community Partners

Parks Canada

Parks Canada remains a key partner for the MDHS. The occasional assistance with building maintenance, and the implicit promotions done by the Lockmaster and summer staff, are valuable to the MDHS. There is no indication that Parks Canada will provide greater funding for overhead or staffing, and the agreements in place for the Blockhouse do not explicitly suggest that the federal government has a financial responsibility for the operations of the Blockhouse Museum. It is clear, however, that they provide the Village of Merrickville with a lease in which the Village is responsible for ensuring that the museum operates through the MDHS.

This tripartite relationship places some onus on the Village of Merrickville to support the MDHS to ensure that they meet the terms of the lease agreement with Parks Canada.

Merrickville Lions Club

<http://www.merrickvillelionsclub.ca/index.html>

In 2006, the Lions Club bought the Canadian Recreational Canoe Association building, which was then given to the community for the public library. In 2017, the club built a community garden and in 2019, following two years of negotiation with Parks Canada, they build the bandstand in Blockhouse Park.

Building a sustained relationship with the Lions Club might make it possible to co-host events that use the Blockhouse Park and the Bandstand. Moreover, they could be a source of volunteers, donors, paying attendees at speaking events, and even ambassadors for the Society.

Merrickville Public Library

<https://merrickvillelibrary.ca/>

It has been noted by stakeholders that the Library is a non-profit operating in a similar fashion to the MHDS, although they do have a Council representative on their Board, and they appear to receive modest support from the Council. They are also managing the challenges of maintaining their building and are seeking greater support from Council for infrastructural repairs.

It makes practical sense to perhaps seek a relationship with the Library board to share a staff position, and possibly even create a space at the library which might act as a year-round mailing address for the Society. If the relationship were to flourish, perhaps the physical archives might also eventually end up at the library, which is a natural fit in communities across the country. Even now, the Library offers access to the MDHS digital archives.

Building a relationship with the Library might also help with the designing, hosting, and promoting speaker series for community members. Furthermore, their website indicates a strong desire to provide services to children and youth, which dovetails with the need for the MDHS to also engage this same demographic on the history of the region and the work of the Society. Moreover, the Library has a robust relationship with the Lions (they Lions Club bought and donated the building that houses the library, and is a supporter of the new Eco Champions program.

Friends of the Rideau

www.rideaufriends.com

Friends of the Rideau is a volunteer-run, community-based not-for-profit organization working with Parks Canada dedicated to enhancing and conserving the heritage and charm of the Rideau Waterway. Friends operates a Rideau Canal information centre annually from June to Labour Day, in a building in Merrickville known as The Depot, providing visitors with information on the construction and history of the Rideau Canal, the oldest continuously operating canal in North America. Through arrangements with the Village of Merrickville-Wolford, and the Merrickville Chamber of Commerce, the Friends' centre (The Depot) serves also as a source of information on the attractions and services in the village.

As well as its education and promotion function, Friends of the Rideau advocates for attention to the maintenance and preservation of the heritage of the Rideau. This advocacy is expressed through the Friends' website, semi-annual newsletter and presentations to Parks Canada senior management and responsible ministers. Apart from the Depot information centre, Friends operates on a virtual basis.

The MDHS could benefit from an arrangement with Friends to enhance public/visitor awareness of the Blockhouse Museum, either via promotional materials distributed at The Depot and through mention on the Friends' website. As well, there could be collaboration between the MDHS and Friends in terms of promotional initiatives for special events.

First Merrickville Scout Troop

<http://www.1stmerrickvillescouts.ca/>

(613) 269-3415

Established in 1908 and recognized as the first scout troop in Canada, this troop is itself a (surviving and thriving) historical artifact. Building a relationship with the members and leaders of this troop could well result in a strong volunteer core, an excellent core of ambassadors, and a strong link to a community of socially active youth. As with all troops in the Scouting movement, there is a strong ethos to "do my best to help others" and that commitment to social welfare parallels the mission of the MDHS to preserve and educate the community about the history of the area.

Royal Canadian Legion (Branches 69 and 245)

229 Main St W Merrickville, ON

<http://www.merrickvillelegion.ca/>

"The Legion is a non profit organization whose primary mission is to provide support and assistance to Veterans and their families as well as serving or former serving members of the military, all members of the police services and the community." The link between the military and the historical purpose of the Blockhouse is obvious, but of course the Legion is also a service club that devotes significant time and financial resources to community organizations. The legion members could well be very effective volunteer tour guides, board members, event organizers and attendees at events hosted by the MDHS.

Furthermore, Branch 245 of the Legion is the official sponsor of the First Merrickville Scout Troop, so there is an immediate symbiosis if the MDHS were to be able to build stronger relationships with both of these organizations.

Promotional Partners

Museums Ontario Portal

<https://www.museumsontario.ca/>

This website is run by the Ontario Museum Association and is a searchable directory of museum members across the province. The Blockhouse is not currently listed, although their interface is very consumer-friendly, and the sites of the MDHS would benefit from being listed on this portal.

Kingston Association of Museums

<https://www.kingstonmuseums.ca/>

35+ museums, art galleries and historic sites are members.

The Kingston Association of Museums, Art Galleries and Historic Sites, otherwise known as KAM, first emerged 40 years ago as a community-initiated, professional support network to promote public awareness and increase engagement across Kingston's cultural heritage sites through collective promotional and programming initiatives. KAM is also engaged in supporting its membership through the dissemination of information, sector best practices, and professional development opportunities.

Our members range from federally owned sites with professional staff, to sites which are member-owned and volunteer operated. Some operate seasonally; others are open year round. Many have specialist collections that tell the stories and histories of our communities from local, regional and national perspectives. From its inception, KAM was driven by the ideal that by working collaboratively, despite differences in size, mandates and resources, cultural heritage sites and organizations could quite simply; do better together, improving practice and strengthening their connections within and across communities.

Regional Tourism Organization 9

<https://rto9.ca/>

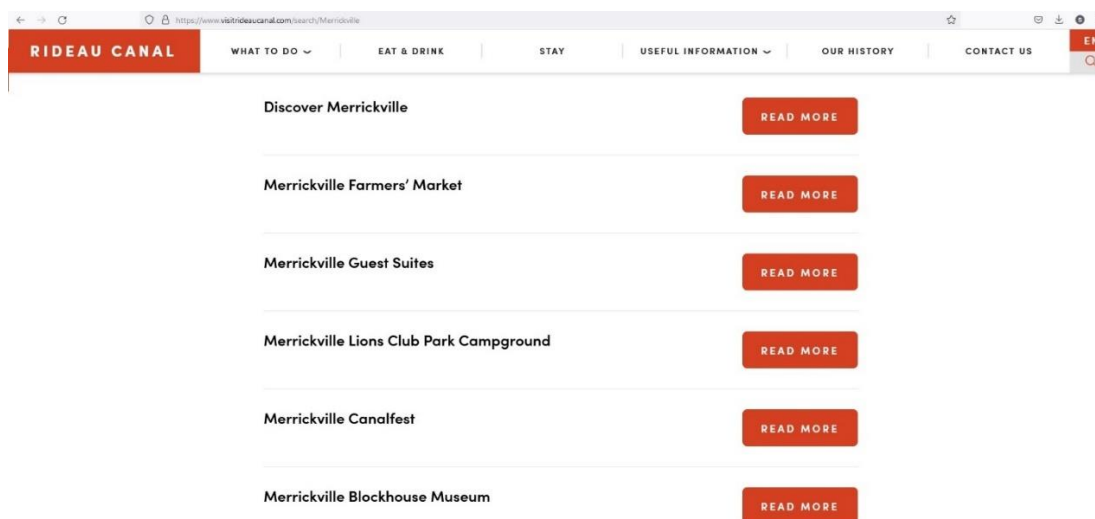
RTO 9 is a regional tourism organization that is funded by the (Provincial) Ministry of Tourism, Culture, and Sport. They actively promote tourism for the South Eastern Ontario region and work to support and grow the industry through product development initiatives. They note, "Our mission is to develop results driven marketing and product initiatives to achieve the highest growth of tourism visitation revenues and investment amongst Ontario's tourism regions."

They have a designated staff member working to promote tourist locations along the Rideau Canal. Her contact details are below:

Ann Weir
Economic Development Manager

Rideau Heritage Route Tourism Association
visitrideaucanal.ca
ann.weir@uclg.on.ca
Tel: (613) 342-3840 x 5365 Cell: (613) 803-0248
United Counties Leeds and Grenville, 32 Wall Street, Suite 300, Brockville, ON K6V 4R9

Note that the designated website for cultural and historic experiences along the canal (<https://www.visitrideaucanal.com/what-to-do/culture-heritage>) is an ideal place to feature not only the Blockhouse museum, but also any future MDHS events that might take place in Merrickville-Wolford. A search for “Merrickville” on this site revealed the following screen shot:



Notably, the Blockhouse link is there, and the presentation when following the “read more” link is very succinct, interesting and informative. However, this portal could also be a location for future events (including a possible annual event). Other annual events of various types from theatre to sports are listed on this website, and it is worth considering how to set the timing and “feel” of a Merrickville event to compliment and not compete with other events in the region.

Capital Heritage Connexion

<https://www.capitalheritage.ca/>

This organization purports to “[e]mpower Ottawa’s heritage sector with expertise, tools and resources; connecting its heritage networks; and representing it to the broader community.” The website offers a calendar of events, partnership opportunities, job postings, funding opportunities, a mentorship program, and a very reasonably priced membership option for heritage organizations.

“To achieve its objectives, the CHC works closely with museums, archives, historical and genealogical societies, cultural communities, heritage buildings and sites as well as a range of

heritage scholars, supporters and advocates. The CHC also acts as an important liaison with all three levels of government.”

The organization boast support from the City of Ottawa, the Province of Ontario, and the Ottawa Community Foundation and is itself a member of a variety of museum associations, tourist boards, festivals and heritage organizations.

CONCLUSION & RECOMMENDATIONS

Contemporary organizations operating historic sites or historical societies have started to introduce new ideas to generate greater interest and greater revenues. Furthermore, the stakeholders of the Merrickville and District Historical Society have provided their opinions on possible key directions and opportunities for relevance and revenue. There are also several existing relationships with Parks Canada, the Merrickville Council and local organizations that provide clear direction for the sustained future of the MDHS and the Blockhouse.

The unique presence of the Blockhouse as a point of interest and a significant reminder of the history of Merrickville-Wolford and of the Rideau Canal itself suggests that the work of the MDHS will continue to be to operate a museum and to staff the Blockhouse for tourists and local visitors. However, there are opportunities to expand upon that ongoing role to generate greater interest, engagement, and revenue to support the growth and relevance of the historical society.

Early in this research the Board of the Society suggested that Social Delta considers an approach which answers the following questions:

1. What is dying that we can usher out peacefully?
2. What are we doing that we can build upon?
3. What are emerging trends that we can engage?

Simply put, the current work of the MDHS that can be “ushered out” might include the management of the annual membership program, and minor fundraising initiatives to sell small seasonal items.

The key work of the organization that should continue (according to both stakeholders and the research on similar organizations) are the presentation of artifacts at the Blockhouse Museum, the maintenance of the public archives, the provision of historic tours and speaking events. Of course, each of these “core” activities should be improved upon, as described in the recommendation below.

After reviewing all the research and trends in this industry, the following are Social Delta’s suggestions for consideration by the board of the MDHS:

Recommendation One: Continue to Engage the Council

The Village Council benefits from the work of the MDHS in several ways. First, the Society operates the Blockhouse Museum each year on behalf of the Village, which is explicitly the responsibility of the Village in the lease agreement they have with Parks Canada for the use of the Blockhouse. Second, the Society works to maintain and animate the living history of region, both at the Blockhouse, and at several cemeteries, but also through public events and the

curation of the archives. The Village of Merrickville-Wolford is made stronger, more interesting and vibrant through the dedicated work of the volunteers at the Historical Society.

Therefore, the Society should continue to seek a stronger partnership with the Village, in which there are potential opportunities to share space and/or staffing resources, and in which a more sustained, significant financial allocation from the Village budget is applied to the staffing, management and promotion of the Blockhouse and other historic sites of interest.

Recommendation Two: Build Stronger Ties with Other Local Organizations

There are several obvious community partners (the Lions, Scouts, Library, schools and the Chamber of Commerce) with whom partnerships would provide mutual benefit for both partners and for the community at large. Museums and historic sites in other communities almost always benefit from collegial partnerships with other community organizations.

The MDHS should endeavor to partner with local organizations and individuals to create learning experiences (walking tours, public lectures, historical replica making) and whenever possible join and participate in regional initiatives with other local museums and social service organizations.

Recommendation Three: Launch a Proper Fundraising Program

The membership program requires significant work each year to renew members, and the revenue generated from fees is very small. The paid membership program should be dropped (although individuals may still register as members without payment in order to vote at annual meetings) and should be replaced by an annual giving program.

That fundraising program might realistically include the following elements:

- Existing members, volunteer and community stakeholders should be invited at least once a year to make a financial contribution (and the “ask” should exceed any membership fee that existed)
- Local businesses and historic property owners can be invited to sponsor special events, or even various elements of the museum (“This diorama brought to you by....”)
- A planned giving program in which community members are encouraged to leave a gift to the MDHS in their will or as a beneficiary of a life insurance policy that would support the living history of the community.

Recommendation Four: Create an Annual Festival

Stakeholders appear to support the creation of some sort of annual festival to be organized by the Society. This festival could serve as galvanizing effort for sponsors, volunteers, donors, local merchants and even the Village Council. Initially, the Festival need not be extravagant, but it would create a focal point for the Society’s brand and could incorporate the Blockhouse museum,

theatrical performances, music, historical tours and even storytelling or community activities for local and visiting families.

Recommendation Five: Broaden the Historical Preservation Role

The MDHS, for those who have any connection at all, is largely associated with the Blockhouse Museum (and to a lesser extent, the keeper of the archives), although there are many opportunities for them to operate as a year-round historical society. The museum and archives are important foundational elements of the Society’s work, but it will be beneficial to identify and tell the history of other built heritage in the region, including cemeteries, barns, factories and even storefronts.

This expansion of the role of the Society may not cost a significant amount (unless the Society chooses to purchase and restore older buildings as part of a long-term strategy—see below), but it would help broaden the appeal, create greater opportunities for community engagement and education and would help to strengthen the organization’s appeal for donors and grant makers.

Recommendation Six: Look for a Long-Term Home

Ironically, the informal nature of the organization has kept costs low and the organization can run on a very lean budget through a difficult time. However, it would be useful to find a year-round “home” for the organization where the financial records could be kept, where mail could be addressed, and where a part time staff member might be able to work. Initially, this office could be a shared space (perhaps as part of a stronger community partnership developed).

In time, however, it would be useful for the organization to seek a permanent home for an office, the archives, and a regular, year-round presence in the community. Ideally this location would also be a location to host fee-for-service programming, community events, or even rent out rooms to generate income. There would be a cost to this recommendation, but if it were part of a 5-year plan, there could be a fundraising effort started now to help pay for (or seek a gift of) a location for the Historical Society. It might even be possible to envision a future where an older building was purchased (or bequeathed) to the Society.

Recommendation Seven: Actively Engage Youth

Young people will be a source of future leadership, current volunteer hours, and possibly could design and run unique and informed “third party” activities for the Society.¹⁸ New events could

¹⁸ A “third party event” is one in which a third party, like a Scout troop, independently organizes create a community event which either generates funds or meets the mission of the Society. In some cases, the Third Party may operate entirely independently, and in other cases, they may present themselves as a partner, or they may ask to run the event under the name of the Historical Society. The key is that the event may involve the brand and/or volunteers of the Society, but the logistics and costs are borne by a third party.

be tested by encouraging a class room, or a scout troop, or a sports team to become the organizers of that idea (theatre, sporting event on the field, music event, etc).

Recommendation Eight: Update the Blockhouse Museum

The static exhibits within the museum are a noted deficiency in attracting and engaging visitors. The signage is seen as outdated and there is an expectation that the exhibits demonstrate more current themes related to the history of the area. Suggestions that have been made, include rotating exhibits, internal projection of video, digitized information (for further reference), better trained interpretive staff, and more reproductions that individuals can “touch” to learn about historical artifacts. There is a need for a public restroom and available WIFI, though not seen as mandatory by most stakeholders, is common to other similar venues in Eastern Ontario.

Recommendation Nine: Try Theatrical Endeavors

Stakeholders believe that re-enactments are an opportunity worth exploring, as a way to engage locals, and attract visitors, and create more enthusiasm about the Blockhouse Museum and the Historical Society. Supporting summer re-enactments could be plays held at other times of the year (possibly in other locations) as a joint initiative between the Historical Society and local thespians. Investigations need to be made, and agreements established with Parks Canada and the Village Council to allow for other entertainment activities in The Blockhouse Park. The grounds of the Blockhouse museum are regarded by many as central, beautiful, and a true opportunity to draw visitors and locals into unique performances and activities in Merrickville.

Recommendation Ten: Create a Modest Retail Operation

It could be financially sound to create a webstore open year-round (with a possible corner kiosk in the Blockhouse during the summer months) to sell products related to the mission and brand of the MDHS or the Blockhouse itself. Possible items for sale might include the following:

- Branded memorabilia (hats, keychains, stickers, water bottles, mugs, etc). Do not get into the business of t-shirts and sweatshirts, as it is very difficult to estimate inventory volumes of different sizes and designs.
- Locally produced art cards, posters, walking tour maps, downloadable historical content, or even books
- Locally produced and/or historically inspired art or preserves (You can accept the order and take a portion of the price paid, but it is practical to actually have the artist or cook fulfill any order made online)

It would be sensible, to create a modest business plan that outlined the input costs (ie the cost to the MDHS to acquire the goods), the overhead costs, and the expected revenues from the various business line suggested above. This endeavor may only net \$5-\$10,000 per year, but it

does increase visibility, and it creates a mechanism through which museum visitors and Historical Society supporters can financially support the organization while promoting the brand and the mission of the organization. Moreover, net income for sales can be used for any purpose the Board of Directors might determine: staffing, repairs, promotions, volunteer appreciation event, etc. (in other words, earned income—and admittedly individual donations—is not earmarked while most grant funding and sponsorship money pays for specific deliverables)

Recommendation Eleven: Invest in Marketing and Promotions

Any successful organization or business relies on actively creating outreach efforts to engage and attract guests, attract and recruit volunteers and staff, and generate visitors, customers and donors. The MDHS has a relatively low profile; those who know it are generally very supportive of its work and mission, but there needs to be greater time spent marketing both the core work—the Museum, Archives and Speaking events—and the opportunities for donation, volunteering and co-development of engaging events for the benefit of the community. New initiatives, like those listed in the above recommendations, will serve as useful fodder for new marketing and promotional copy. The Board should devote time to consider taglines that help to launch the organization into a new chapter, where the purpose of the Historical Society is to recognize, celebrate and create history for the benefit of visitors to and residents of Merrickville-Wolford.

Final words.

In the pages of this full review are many examples of opportunities that the MDHS can consider based upon the work of contemporaries in the field and recommendations made by stakeholders, but the above eleven recommendations provide a strong direction for the Board to incrementally build the strength and scope of the Historical Society over the coming years. Most of these recommendations have relatively modest financial cost implications, but they will rely on building a stronger network of volunteers and partners and a governance commitment to bring to life the renewed mission of the Society.

Income generating activities and the launch of a robust fundraising effort will help to cover initial costs of growth and annual operations, and every effort should be placed to encourage the Council to provide modest but recurring financial support to the Society in order to allow the Society to maintain the Blockhouse Museum on behalf of the Council, as required by the lease agreement with Parks Canada.

The Merrickville and District Historical Society has a long history of voluntary service to support the preservation of historical buildings, artifacts and locations in the region. This strength is a strong foundation for the next decades, as new programs, new revenue streams and new blood is brought into the mission and purpose of a contemporary Historical Society.

APPENDIX A: NATIONAL TRUST RESOURCES

The National Trust for Canada has created resources located at <https://regenerationworks.ca> to support small and medium sized heritage organizations to improve their operations. These tip sheets are a result of tabulating best practices from similar organizations working to protect and sustain built heritage sites and the related museums and archives to ensure that they are available to the public.

Top ten recommendations for historic places to increase and maintain visitation levels

The following tips will help raise your site's profile and make your visitors feel welcome.

- Develop a broad, comprehensive social media presence that is consistent across platforms (website, Facebook, Instagram, Twitter, etc.) and update content and followers constantly.
- Develop and promote annual and special events on site that are unique and site specific.
- Create and maintain an email/social media list of visitors from your physical and website guest books to promote upcoming heritage destination activities and notable happenings.
- Encourage cross marketing partnerships with local and regional businesses and events, sourcing food, souvenirs, entertainment, and services locally.
- Reach out to audiences such as Generation X, Millennials and new Canadians and provide direct invitations to participate in events on-site. Ensure these events are relevant to their individual interests.
- Be clear and ready to receive visitors at consistent opening times and dates. Keep the website and social media updated if there are any changes due to weather, illness, or holidays.
- Update your venue to be accessible for a range of travellers.
- Test and improve directional and on-site signage and interpretation, and reinforce staff knowledge with a training guide containing easily accessible site facts and data.
- Make sure your facility is well maintained. Ensure the washrooms are clean and trash receptacles emptied regularly.
- Provide free Wi-Fi access at your venue – it's a quick way to attract younger visitors and ease transmission of site photos and reviews. It is almost an expected service now.

APPENDIX B: STAKEHOLDER SURVEY

Below is the template email copy (personalized for each contact) that was sent to stakeholders. And following that are the survey questions that were transferred to an online form. (using QuestionPro.com)

Subject: Merrickville and District Historical Society Stakeholder Survey

Dear [name of stakeholder]

As a stakeholder in the work of the Merrickville and District Historical Society (MDHS), your opinions matter to us.

I invite you to answer a few questions about how you perceive the work of the Historical Society, and your relationship to the organization. This is a time when the board of the Society seeks to confirm the role, programs, and financial resilience of the organization, and we are looking to a diverse group of individuals in the community, including you, to help us with ideas, reflections and opinions.

To make it easy, we've created a 15-question *anonymous* survey online. Simply click [here](#). We estimate that the survey will take you no more than 15 minutes, but your input provided in the next week or two will help ensure that MDHS provides relevant and interesting programs to the residents and visitors to Merrickville-Wolford.

I will be tabulating the results and helping the Society interpret those results into a meaningful and sustainable strategy for the years ahead. If you have any questions or if you have difficulty accessing the survey, please feel free to contact me directly by replying to this email.

On behalf of the board of MDHS, I thank you in advance for your input and candid responses.

Survey Questions: (question format in parentheses)

- Is it necessary, in your opinion, to preserve the built history of the village of Merrickville-Wolford? (Y/N)
- How would you like to see the history of Merrickville-Wolford celebrated? (short narrative)
- Do you believe the Blockhouse is an important visitor site in Merrickville? (Y/N) Why? (short narrative)
- When was the last time you visited the Blockhouse? (pick one)
 - In the summer of 2019, before COVID

- More than three summers ago
 - I visit the site regularly (more than once a year)
 - Never
 - I can't remember
- If there were to be an admission fee, what price would you recommend? (pick one)
 - \$3/adult, Under 18 and volunteers free
 - \$4/adult, Under 18 and volunteers free
 - \$5/adult, Under 18 and volunteers free
 - I like the idea of an admission fee, but I don't like any of these options. (Feel free to propose a fee structure in the comments field at the end of this survey)
 - I don't believe there should be any admission fee
- What would have to be improved at the Blockhouse to warrant an admission fee? (short narrative, 75 words)
- From the following list, which do you feel would be most effective at attracting guests to the Blockhouse? (pick three)
 - Available free wifi
 - A bathroom on site
 - Community contests (photography, art, storytelling, or similar)
 - Movie nights
 - Music performances
 - Historical re-enactments
 - Summer students in costume
 - Public events held within the building
 - Rental of the building for private functions
 - Children's programming
 - Other: please let us know: (narrative box)
- What do you believe should be the five main activities of the Merrickville & District Historical Society? (choose up to five from the following list)
 - Maintaining the public archives for the region
 - Curating and displaying historical artifacts at the Blockhouse.
 - Offering historic tours in the region (properties, cemeteries, sites).
 - Offering concerts and or public events on the grounds adjacent to the Blockhouse.
 - School visits.
 - Partnering with local businesses to create tourist events (festivals, public markets, or the like) throughout the summer.
 - Be an active voice in formulating and executing a tourism strategy for the region.
 - Offering speaking events on relevant history for the region.
 - Continuing digitizing public records.
 - Creating a virtual tour of the Blockhouse.
 - Create a virtual tour of all historical buildings in the community.
 - Acquiring other local properties to protect them.
 - Organizing events for local residents at or near the Blockhouse.
 - Working harder to document the indigenous history of the region.

- None of the above. (ie I believe that the Historical Society shouldn't continue)
- If there are other activities not in the above list that you believe would be suitable for the Merrickville & District Historical Society to undertake, please provide suggestions here: (short narrative 100 words)
- Are you a member of the Merrickville & District Historical Society? (Y/N)
 - If yes, describe the benefits you derive from membership? (short narrative, 50 words)
 - If no, describe benefits that would entice you to become a member? (short narrative, 50 words)
- Have you ever been a donor to the work of the Historical Society, which is a registered charity? (please check one of the following options)
 - No, I didn't realize they accepted donations
 - No, I choose not to support them
 - No, I need to know more about how my donation would be used.
 - No, I've never been asked
 - No, I'm a member, and I consider my membership to be my annual contribution.
 - Yes, I have donated once to the society
 - Yes, I donate annually to the society
 - Yes, I donate more than once a year to the society
 - Yes, in fact I'd like to donate monthly to support the society's work
 - Yes, but my donation has been of artifacts, not cash.
- The Merrickville & District Historical Society is largely volunteer run, and receives very little funding from government or foundation sources to cover operating expenses. Which of the following revenue generation strategies would you feel are worth pursuing or expanding to sustain the organization: (rate from 1-10, where 1=not appropriate and 10=great idea)
 - Charge admission to the museum.
 - Increase membership dues.
 - Create more fee-based services like events and festivals.
 - Devote greater resources to fundraising from individuals.
 - Seek corporate sponsorships.
 - Seek to have the local council provide sustained annual funding to cover operating costs.
 - Create products for sale, where profit from sales would be invested in the organization's mission and programs.
- If the Historical Society were to sell goods or services to generate revenue, which of the following products would you consider buying from them? (check all that apply)
 - Historical reproductions
 - Coffee/Tea/baking
 - Local artisanal items (from preserves to pottery and woodcraft to woollens)
 - Branded souvenir merchandise (T-shirts, caps, mugs, etc)
 - Research services (to provide research of the archives)
 - Tours of the local region
 - Bike or scooter rentals
 - Rental of the Blockhouse for private functions.

- I don't believe that the Historical Society should have to sell products to pay for their work.
 - Other: (please provide suggestions below...short narrative of 75 words)
- Community development and the preservation of history require collective efforts, and the historical society seeks to work with community partners from the public, private, non profit and co-operate sectors. Please provide any recommendations that you have for a productive local or regional partnership for the Historical Society to consider. (short narrative, 100 words)
- Do you have any other comments to share that would help the Merrickville & District Historical Society effectively improve tourism, celebrate Colonial/built/natural/Indigenous history, or encourage local residents to become more engaged in the Blockhouse and other historic sites in the local region? (longer narrative option ~200 words)

APPENDIX C: CHARITY RELATED BUSINESS

The following summary draws from the CRA policy statement CPS-019, which can be found at <https://www.canada.ca/en/revenue-agency/services/charities-giving/charities/policies-guidance/policy-statement-019-what-a-related-business.html>.

According to the Related Business Clause of the Charities Act, business activities must either be principally operated by volunteers OR be “linked and subordinate” the work of the charity.

“Linked” simply means that the business has to have some link to the social mission of the organization, and this can be open to some interpretation, although the business operations would have to be very much unrelated to trigger any real challenge under this portion of the legal language.

“Subordinate” specifically means that the earned revenue from business activities of a charity may not exceed 50% of total revenues from all sources. In effect, this means that a charity can not run exclusively as a business, gaining the majority of its operating revenue from the sales of goods or services. When charities complete line 4700 of the T3010, they have to declare the earned income they’ve made in a year. If this number exceeds the total income from grants, donations, interest, rent, transfers from other charities or other income, then CRA *may* ask some questions as to the charitable intent of the organization.

If a charity that is selling products or services feels that they may in any way be contravening the Related Business Clause, it is prudent to engage a lawyer to ensure that they are not jeopardizing their charitable registration by operating business activities from within the charitable structure.

Of course, if they are running offside in the opinion of legal counsel, or the Charities Directorate, then the business activities can often be “moved” to a new organization that can be 100% owned by the registered Non profit, but operate at “arms length” as necessary.

APPENDIX D: SAMPLE JOB DESCRIPTION

Historical Society Co-ordinator

Hours: (P/T to F/T depending on organizational aspirations and available funds)

Reports to: Board of Directors

Salary: \$30-40/hour

Job Duties:

- Enact the strategic programs approved by the Board of Directors
- Report operational progress to the Board of Directors
- Respond to incoming email and/or telephone calls
- Oversee and support all volunteers working for the MDHS
- Help build and manage partnerships with local organizations, Council, businesses and other stakeholders
- Recruit and manage summer students working as interpreters at the Blockhouse.
- Design, coordinate and oversee all community events including lectures, presentations, school programming, and tours.
- Ensure that financial records are maintained (supporting the work of a bookkeeper or volunteer treasurer)
- Design and distribution promotional materials for the Society and its programs
- Participate in strategic planning for the Merrickville and District Historical Society.
- Draft proposals to funders for operational grants and/or program grants.
- Submit reports to funders and government as required by the Board of Directors.

Location of Work:

- Work can be done from home, but if and when an office becomes available, the Coordinator will be expected to work out of that office.

NOTES TO THIS REVIEW

This document has been written primarily to provide information to the Board of Directors of the Merrickville and District Historical Society. This information is designed to help them build a robust and sustainable strategy for the work of the Society from 2022 onwards.

Although many issues and ideas have been discussed over the last year, this document is an attempt to capture the key elements of dynamic conversation.

It is recognized that every organization will change over time and any effort to re-visit a formal strategic planning process should adapt to accommodate new information gathered from this point forward. All recommendations and observations provided by Social Delta are based upon information shared by the current board of directors and stakeholders of the organization, and should be subject to scrutiny as time passes, specifically if the MDHS governance and/or management team change.

Although every effort has been taken to provide sound guidance and to identify and address a wide range of risks, the author of this document takes no responsibility for any losses or financial liabilities that may result in the application of these set of recommendations, nor any subsequent set of recommendations or actions based upon this summary.

Caution should be exercised if this document is to be used in its entirety to support a funding application, a financing proposal, or any sort of financing pitch as every audience deserves a document that meets their needs. Moreover, this document has not concluded any operational or funding requirements; it is simply a reflection of discussions to date and possible opportunities to explore in future.

All financial information in this document has been expressed in Canadian dollars unless specifically noted.