

# BUILT AND LANDSCAPE HERITAGE EDUCATION: KEY CONCEPTS AND RECOMMENDATIONS

Heritage Conservation Education Workshop Report  
September 2016

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<http://www.ucalgary.ca/cities/heritage-conservation>

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## 1 - INTRODUCTION

### **1.1 - Purpose of the Heritage Conservation Education Workshop**

The Faculty of Environmental Design (EVDS) at the University of Calgary held a one-day workshop on May 31, 2016. It was an opportunity to engage in productive conversations about the future of heritage conservation in Alberta, and the educational needs of heritage professionals.

In 2017, EVDS plans to launch a Graduate Certificate for early and mid-career professionals in Architecture, Planning, and Landscape Architecture specialising in heritage conservation. It responds to the need to build a critical mass of expertise in the province, particularly with the growing inventory of heritage resources that will need attention in the coming years. **The Built & Landscape Heritage** certificate would make a substantial contribution towards training the next generation of heritage professionals in Alberta to sustain the province's heritage resources.

The workshop provided professionals, educators, industry experts and members of provincial, municipal and community organizations with a platform for knowledge sharing, disciplinary reflections, and institutional exchange on critical issues that need to be addressed in the new Graduate Certificate. The thought-provoking sessions included facilitated conversations on the best way to establish a heritage conservation Certificate that is relevant, interdisciplinary and innovative. EVDS collaborated with the Historic Resources Management Branch, Alberta Culture and Tourism and the Alberta Historical Resources Foundation to run this event. Participants were divided into groups to facilitate the exchange of ideas. Each group shared the highlights of its discussion with the group at large. The recommendations from the workshop will guide curriculum development for the new Certificate in **Built & Landscape Heritage**.

### **1.2 - Acknowledgements and Report Structure**

EVDS acknowledges the contribution of the Heritage Conservation Education Workshop team – Sasha Tsenkova, Larry Pearson and David Monteyne – who

have been invaluable during this process. The leadership of workshop facilitators – Bob van Wegen, Fraser Shaw, Erin van Wijk and Stefan Cieslik – was instrumental for productive and exciting group conversations. Special thanks to EVDS students Zach Hoefs, Jeanette Burman, Crystal Jackson, Magda Wojtalewicz, and Natalie Robinson, whose enthusiasm and energy was critical for the organisation of the workshop. And finally sincere thanks to Darryl Cariou for his thoughtful ideas as well as to EVDS staff – Hana Labonte, Allan Lyons, Tracy Beauregard--who provided much-needed support with workshop logistics and communications. The financial support of the Alberta Historical Resources Foundation and the City of Calgary for this workshop is gratefully acknowledged. EVDS recognises the contribution of more than fifty participants in the Heritage Conservation Education Workshop and in particular their professional involvement during this one-day intensive discussion. This helped shaped a diverse and inspiring mosaic of ideas that will guide curriculum development in the future.

This report is organised into four sections and annex materials: The first section defines the purpose the Heritage Conservation Education Workshop. The second section provides an overview of the overarching catalysts for this Certificate’s implementation, target audiences, course structure, and the approval processes. The third section describes the engagement strategy and facilitation process during the one-day event. The fourth section provides a synthesis of the outcomes of course-specific group sessions related to course content and pedagogy. The annex materials include workshop agenda, focus group reports and other information related to the new **Built and Landscape Heritage** Certificate at the University of Calgary.



## 2 - BUILT & LANDSCAPE HERITAGE CERTIFICATE: CONCEPTS & PROCESS

### 2.1 - Objectives, Approach and Target Audience

EVDS plans to launch a new Graduate Certificate in **Built and Landscape Heritage** in 2017. It is intended for early- and mid-career practitioners in Architecture, Landscape Architecture, Planning and other related disciplines who would like to acquire specialized knowledge and skills related to heritage conservation. It will be of particular interest to professionals who wish to gain this expertise in a Canadian context, and will also be of interest and value as a suite of courses to current graduate students at the University of Calgary. The Certificate will address the needs of practicing heritage professionals seeking to upgrade their skills and knowledge in heritage conservation (EVDS, 2016).<sup>1</sup>

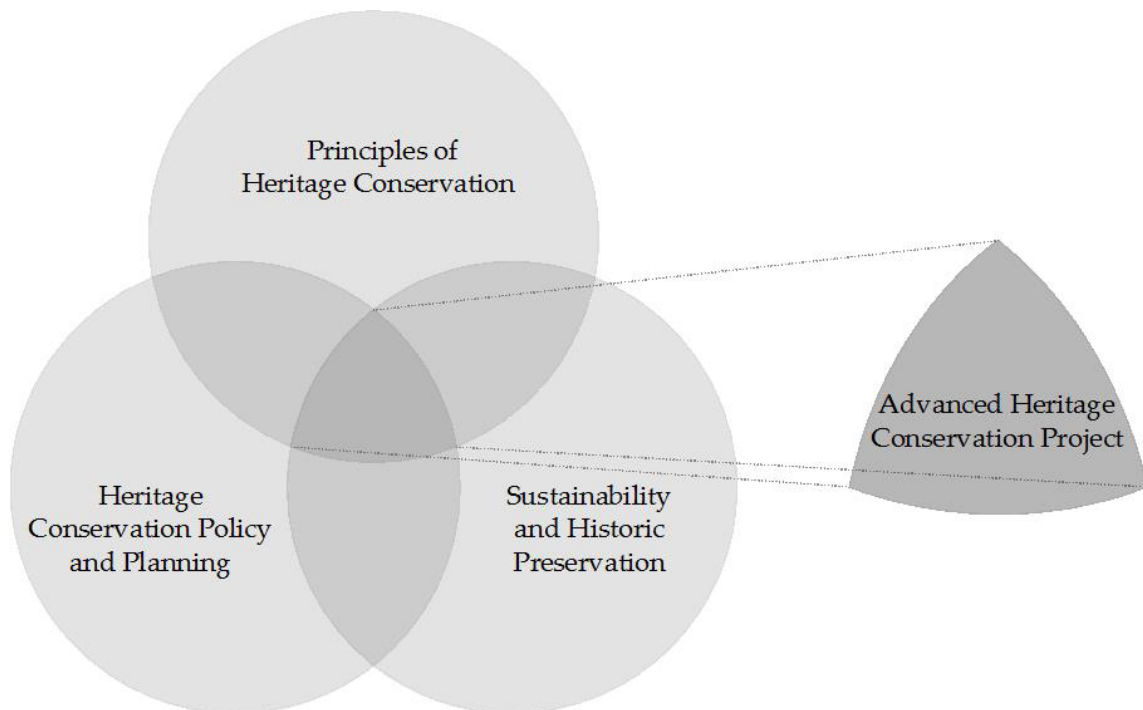
**Objectives:** This is a long-term educational initiative that builds on EVDS strengths and expertise in delivering graduate professional programs in Architecture, Planning, Environmental Design and Landscape Architecture. The Certificate aims at providing training to heritage professionals where specialized knowledge is balanced with interdisciplinary course content. It draws on the regional, historical and architectural context to make the learning experience relevant to practitioners in the province.

**Approach:** The curriculum is focused on a structured approach exploring the critical links between heritage conservation theory and practice through the lenses of research, policy analysis and design intervention in the built environment. It will facilitate the implementation of the conservation framework established in the early 2000s by *Canada's Historic Places Initiative* and the work of federal, provincial and municipal partners building a culture of heritage conservation in Canada. The Certificate extends over one-year offering four

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<sup>1</sup>EVDS (2016) Built & Landscape Heritage Certificate Proposal. Calgary: University of Calgary, Faculty of Environmental Design. <http://www.ucalgary.ca/cities/heritage-conservation>. Accessed May 12, 2016.

courses in a block-week<sup>2</sup> format. The courses are lecture- and seminar-based modules that cover the theoretical concepts underpinning contemporary heritage conservation practice. The final project-based course allows students to apply the theoretical and operational concepts of heritage conservation to real-world study sites (Figure 1).



**Figure 1: Course structure of Built and Landscape Heritage Certificate**

**Policy context:** The term heritage conservation used in the **Built and Landscape Heritage Certificate** proposal is adopted from the *Standards and Guidelines for the Conservation of Historic Places in Canada* (2010)<sup>3</sup>. The conservation activities

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<sup>2</sup> The University of Calgary has five-day periods at the start of the Fall, Winter and Spring/Summer Terms as Block Weeks for the offering of regular courses in an intensive manner. <http://www.ucalgary.ca/pubs/calendar/current/b-6.html>

<sup>3</sup> Canada's Historic Places. *Standards and Guidelines for the Conservation of Historic Places in Canada* (2<sup>nd</sup> ed.). <http://www.historicplaces.ca/en/pages/standards-normes.aspx>. Accessed May 12, 2016.

(preservation, rehabilitation and restoration) are seen as a sequence of actions progressing from understanding the historic place through inventory and interpretation, through to planning for its conservation, and ultimately intervening through actual projects. The approach to be taken in EVDS's Certificate program emphasizes research and investigation to understand the heritage value of the historic place, its evolution over time, and past and current importance to its community. Heritage planning links a comprehensive understanding of an historic place with interventions that respect its heritage value, considers all factors affecting its future, including the needs of the owners and users, community interests, the potential for environmental impacts, available resources and external constraints. Interventions resulting in a physical change to historic places character-defining elements (forms, location, spatial configurations uses and cultural associations), must respect and protect its heritage value. EVDS plans to apply all of these principles consistently to explore a range of both tangible and intangible heritage resources – from a single site to a broad landscape complex.

**The target audience** includes heritage professionals, government officials and graduate students.

***Heritage professionals:*** This group includes architects, planners, project managers, historians and possibly also engineers, landscape architects and urban designers. Both the involvement of architects, planners and historians in heritage projects and the high level of professional accountability required, contribute to a strong demand for training within this group. Training for professionals is strategically important because of the pivotal role that heritage consultants play in the conservation process.

***Government officials and staff:*** Heritage conservation training is also vital to building provincial and municipal governments' capacities to initiate and administer local heritage programs. Municipal administrative staff -- planners, development review and bylaw officers, and building inspectors -- will require a more in-depth understanding of preservation issues and the regulatory context within which heritage programs function.

***Graduate students:*** This group consists of post-Baccalaureate students, especially those in professional programs such as Architecture, Landscape Architecture,

Planning, and Engineering. In this context, training could constitute part of a “succession planning” strategy by laying a foundation for a future generation of conservation practitioners. Heritage conservation training could also be offered to EVDS students (currently numbering over 300) and can potentially attract graduate students in history, geography, communications and culture, museum studies and archaeology (Canadian and international).

## **2.2 - Consultation, Review Process and Pedagogy**

The proposal for **Built & Landscape Heritage Certificate** was developed by Dr. Sasha Tsenkova, Professor of Planning at EVDS, over a fifteen month period. It builds upon extensive review of existing heritage conservation offerings in Canada, consultation with provincial and municipal heritage professionals and Board members of Alberta Historical Resources Foundation (AHRF), leaders of professional associations and heritage conservation organisations at the national and provincial level. It has received overwhelming support by a large number of national, provincial and community-based heritage organisations<sup>4</sup>. The proposal was officially approved by the University of Calgary on May 12, 2016, and has gone through seven stages of institutional review. The process of curriculum development, supported by AHRF and EVDS faculty, will continue in the next year so that the content and delivery of the courses effectively responds to the demand of heritage professionals in the province.

Preliminary internal consultations on curriculum issues included meetings with key individuals on campus to secure synergies in heritage conservation program offerings. The Heritage Conservation Education Workshop was a critical milestone in the review process (Figure 2). Its participatory format was designed to provide further guidance on the development of course materials, the selection of conceptually appropriate case studies, and studio projects.

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<sup>4</sup> See letters of support in the Heritage Certificate Proposal, EVDS, 2016, [http://www.ucalgary.ca/cities/files/cities/finalheritage\\_certificate\\_proposal.v10.pdf](http://www.ucalgary.ca/cities/files/cities/finalheritage_certificate_proposal.v10.pdf) ).





**Figure 2: Consultation & Review Process: Major Milestones**

**Pedagogy:** The Certificate will be distinctive because of its emphasis on heritage conservation in the built environment within the western Canadian context. This context allows us to address conservation issues that are specific to the economically and culturally diverse cities in the province through a wide range of conservation tools – from the *Standards and Guidelines for the Conservation of Historic Places in Canada* to municipal incentives and private sector financing. While Calgary will be the basis of intensive training, given the importance of the urban context at different scales of heritage conservation, the curriculum will incorporate ‘nomadic training’ providing students with opportunities for experiential learning and field visits to different sites. The project-based techniques, visualization skills and research methodologies will have a strong emphasis on conservation practices, and will be transferable across cultural and geographic contexts. Planned enrolment of 15 students per year will capitalise on faculty expertise, resources and facilities (Tsenkova, 2016).<sup>5</sup>

A particular strength of the Certificate is the breadth and caliber of expertise it will offer professionals and students in Alberta by tapping into the expertise of practitioners from Canada and abroad.

<sup>5</sup> Tsenkova, S. (2016a) Heritage Conservation Education Workshop Brief, Calgary: University of Calgary, EVDS. May12, 2016. (<http://www.ucalgary.ca/cities/files/cities/>).

**Resources:** The Certificate is a strategic priority for EVDS and an integral part of its *Strategic Plan* (2016-2020). EVDS is uniquely positioned to offer a **Built and Landscape Heritage Certificate**, given its previous long-standing involvement in managing a Heritage Resource Program till 2005. We also have a competitive advantage of delivering graduate professional programs in Architecture, Planning and Landscape Architecture. There are many full-time, sessional and adjunct faculty members who have taught and practiced heritage conservation, and who have much to contribute to the program. In addition, once the Certificate is approved, additional adjunct appointments will be made to include a growing roster of guest speakers, reviewers and advisors. A core group of faculty members will be involved in the delivery of the Certificate over the long term. This will support the sustainability of the program and will help monitor its quality.

The Certificate will be offered during intensive block week periods when EVDS does not currently offer its programs or has dedicated time for block courses. EVDS occupies 6000 gross m<sup>2</sup> in the east wing of the Professional Faculties Building. This is a purpose-built facility occupied since January 1994, and most of our classes and studios are held within it, which allows the development of a community and faculty culture. The highly specific pedagogy of the Faculty's professional design-based graduate programs is the primary driver for the configuration of the facilities. A significant proportion of the facility is devoted to open plan teaching/research studios that are easily reconfigured into flexible project work areas for graduate student teaching and research. As a Faculty with strong professional connections, EVDS also makes use of the Downtown Campus (906 - 8 Avenue SW) with a possibility for final project reviews of the Certificate.

**Financial support:** The Certificate's development and first years of delivery have been supported generously by the Alberta Historical Resources Foundation. **The Certificate in Built and Landscape Heritage** will fulfill an important need in heritage conservation education at the University of Calgary, and will provide continuing professional education for heritage professionals and government officials in the Alberta.

### 3 - HERITAGE CONSERVATION EDUCATION: WORKSHOP ENGAGEMENT STRATEGY & RESULTS

#### **3.1 - Workshop Engagement Strategy and Process**

On May 31, 2016, fifty-two professionals with varied professional backgrounds and experience in heritage conservation in Canada congregated at the Faculty of Environmental Design. The group--composed of heritage professionals, government officials, graduate students and professors--brought unique perspectives to discussions and lent an interdisciplinary feel to the collaborative event. Participants were selected by the Workshop Organising Committee, chaired by Dr. Tsenkova.

The day started with opening remarks by Dean Nancy Pollock-Ellwand who extended a warm welcome to all participants and provided a background as to the genesis of this initiative, as well as the Faculty's enthusiasm to be developing this Certificate for the community. The agenda included three thematic presentations designed to provide much-needed policy context for the focused discussions that followed (see Annex 1 for further detail). Larry Pearson, Director of Historic Places Stewardship, reviewed the legal and institutional context of heritage conservation in Alberta and highlighted some of its challenges and opportunities (Pearson, 2016).<sup>6</sup> Chris Wiebe, Manager, Heritage Policy & Government Relations of the National Trust for Canada, discussed the important educational initiatives in heritage conservation across Canada, emphasising the need for educated and trained professionals to step into roles in this growing field.<sup>7</sup> Sasha Tsenkova then provided participants with background on the development of the **Built and Landscape Heritage Certificate**, describing key objectives, government and university approvals, target audiences, course content and pedagogy (Tsenkova, 2016b).<sup>8</sup> This set the stage for follow-up work in four focus group discussions designed to elicit professional opinion on course

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<sup>6</sup> Pearson, Larry. The Alberta Context. <http://www.ucalgary.ca/cities/heritage-conservation>. Accessed August 24, 2016.

<sup>7</sup> Wiebe, Chris. Heritage Conservation Training in Canada. <http://www.ucalgary.ca/cities/heritage-conservation>. Accessed August 24, 2016.

<sup>8</sup> Tsenkova, Sasha. Built and Landscape Heritage Graduate Certificate. <http://www.ucalgary.ca/cities/files/cities/heritage.pdf>. Accessed August 24, 2016.

content and delivery.

**Figure 3: Workshop presenters Larry Pearson, Chris Wiebe and Sasha Tsenkova**



Each group focused on one of the four courses. Discussions were led by facilitators who guided the conversation assisted by a student responsible for recording ideas. Morning discussions were geared towards course content, and the afternoon on course delivery. Each session followed the same approach, where specific questions were posed to the groups by facilitators. The groups were shaped in a way that ensured interdisciplinary perspective and capitalised on professional and academic experiences (see Annex 1 for a list of focus group participants and key directions for the discussions). Individuals provided perspectives unique to their professions, followed by a group consensus process that consolidated these ideas into priorities for the specific course foci. At the end of each discussion, a leader/focus group participant reported back on key findings to the audience (Figure 4).

### **3.2 - Focus Group Logistics and Results**

The four courses discussed were:

- Principles of Heritage Conservation
- Heritage Conservation Policy and Planning
- Sustainability and Historic Preservation
- Advanced Heritage Conservation Project

**Figure 4: Groups Dynamics at the Heritage Conservation Education Workshop**



In the morning session, the focus groups discussed the content that should make up the four courses in the **Built & Landscape Heritage Certificate**. In the second



session, they discussed how this content might be delivered in the context of “block week” courses (four to five day-long intensive sessions).

*Facilitated Group Discussion 1 (WHAT): Knowledge and Skills*

The over-arching goal of Discussion 1 was to consider what content and coverage will make a **Built & Landscape Heritage Certificate** relevant, interdisciplinary and innovative. Questions guiding the discussions were as follows: In your particular course, what information needs to be provided to students? What issues do students need to be made aware of? Given your professional position or background, what are the priority topics, concepts and/or skills to be learned? What critical learning outcomes do we want to achieve?

*Facilitated Group Discussion 2 (HOW): Training Delivery Models*

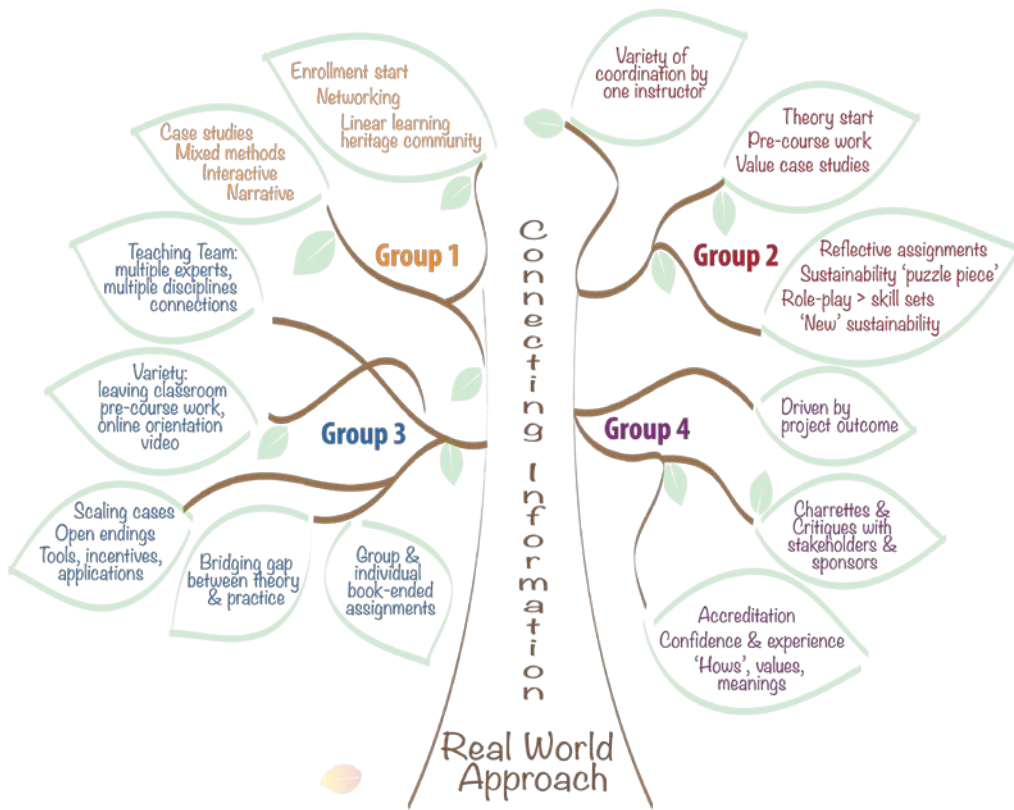
The over-arching goal of Discussion 2 was to develop a range of ideas and activities for delivering course content to certificate students in a compelling and comprehensive manner. Specific questions included: In your particular course, how do we achieve the critical learning outcomes? How do we make issues and ideas real to students? What are best practices for training heritage professionals? How do we balance theory with practice? How do we teach theoretical breadth or specific skills? What are specific classroom/studio/fieldwork strategies? What are opportunities or challenges to delivering these courses?

Recorders used posters, flip charts, post-it note collages and sketches to summarise and visualize group ideas and key recommendations (Figure 5). After each session, the groups focused on building consensus on the most important learning outcomes or pedagogical strategies. The facilitators worked with group members to cluster similar ideas and select three to five top priorities to be presented to the entire workshop. This was an important way of communicating priorities and connecting different focus group perspectives. Group summaries were represented via an “ideas tree” (see Figure 6). A lively discussion, moderated by Larry Pearson, ended the day.

**Figure 5: Facilitated Discussions and Visual Recording**



At the end of the workshop student recorders created a digital photographic record of the discussions available for review on <http://www.ucalgary.ca/cities/heritage-conservation>. After the workshop, a graphic recorder, Sam Hester, created a visual record of key concepts of the Certificate program content and delivery. This visual documentation assisted in follow-up communication with workshop participants and others. In the weeks immediately after the workshop, Dr. Sasha Tsenkova and the facilitators prepared written summaries of the group discussions, provided in Annexes 2, 3, 4 and 5.



**Figure 6: The Ideas Tree<sup>9</sup>**

<sup>9</sup> Jeanette Burman (2016) Heritage Conservation Education Workshop Illustration, EVDS, University of Calgary, May 31, 2016

## 4 - HERITAGE EDUCATION WORKSHOP FINDINGS & RECOMMENDATIONS

### 4.1 - Principles of Heritage Conservation Course

Workshop participants felt this course should provide a broad foundation for the Certificate program by introducing themes on which other Certificate courses would build and that would culminate in the final Advanced Heritage Conservation Project. The written summary by the facilitator, Bob van Wegen, is included in Annex 2 and a graphic illustration of key messages by Sam Hester appears in Figure 7.

*Course content:*

**A historical survey of heritage conservation** in this introductory course would trace the evolution of conservation approaches, methods, and policies and illustrates global best practices. Far from being static and entrenched in the past, conservation interests and values have evolved from the protection of monuments and historic places to the management of cultural landscapes and the stewardship of intangible heritage. The conservation movement's historical narrative can provide an organizing framework for the introductory course itself.

**Conservation as an interdisciplinary practice** involves many key players and a broad range of expertise, from architects, historians, planners, engineers, to financiers and others. Activities and roles range from communication, negotiation, mediation, education, to advocacy.

**Conservation tools** include heritage legislation, conservation charters, and policies at local, provincial, national and international contexts. Foremost among these for Canadian practitioners is the *Standards and Guidelines for the Conservation of Historic Places in Canada*, a toolkit adopted nationwide that sets out conservation principles and provides a framework for decision-making, standardized terminology, and practical guidelines for a wide range of resource types.

**Context-based conservation** considers the contribution of historic resources to the public realm, the business case for heritage conservation, and the role of design guidelines and other policy tools to address the fit of new uses, buildings

and other elements within a heritage environment. A course objective would be to promote a shift in educational emphasis on new construction to context-based stewardship and the adaptive reuse of existing resources. This theme of social and environmental sustainability would be developed throughout the Certificate program. This course would also consider the business case for conservation and the impact of economic swings on conservation activity.

**Community engagement** has an essential role in conservation and conservation training. Historic places are ultimately about people and collective memory, and the public both informs heritage practitioners' understanding of these places and articulates why they are of value and worth conserving. Furthermore, conservation occurs within a larger narrative of community values – social, cultural, economic and environmental. The course would also consider the importance of community capacity building and the contributions of advocacy and grassroots initiatives in building public and political support for heritage conservation.

**Other course topics** include disaster planning and management and world heritage at risk from fire, flood and war.

*Course delivery:*

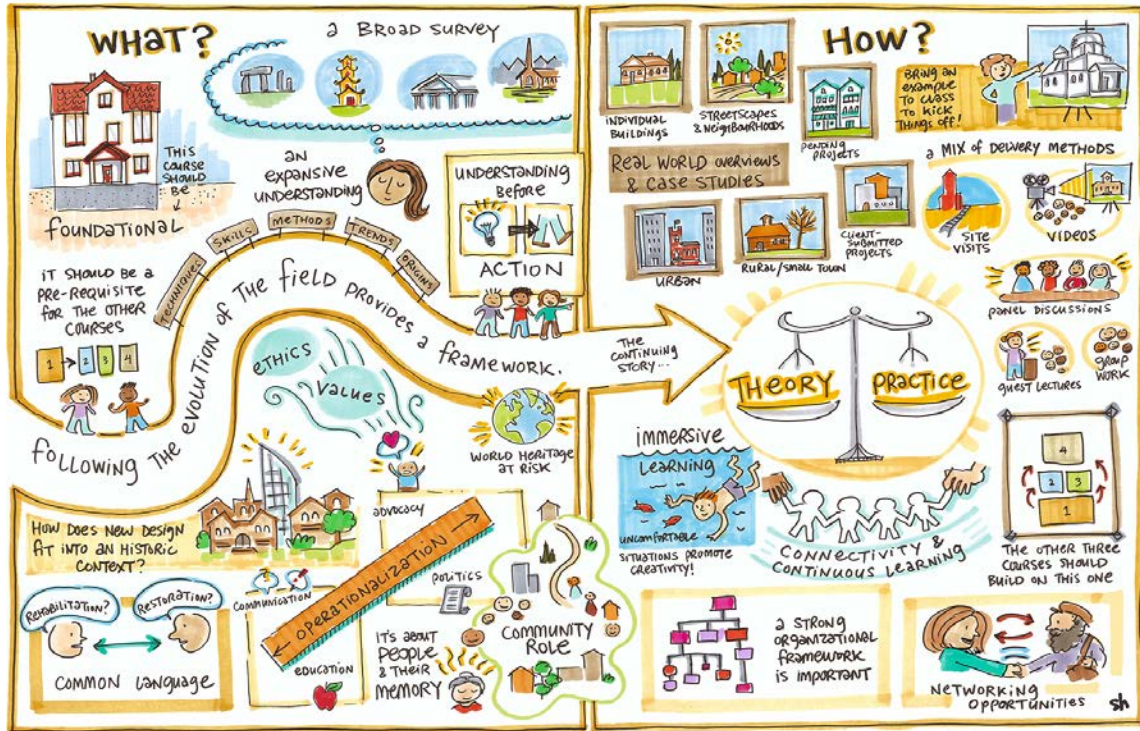
**Case studies from Alberta, Canada, and abroad** would provide the primary source of course material and embed conservation principles within practice. Case studies should exemplify both good and poor practices and represent a broad spectrum of project types and scales in rural and urban contexts. Source material could include client projects and Main Street rehabilitation projects.

**Pre-course readings and assignments** might alleviate the time pressures of a compact block course format. As a pre-course assignment, students could prepare a favourite (or least favourite) conservation case study for presentation to the class, both as a personal introduction and catalyst for discussion.

**Varied teaching methods** and content delivery would maintain student engagement throughout the week and could include guest lectures, panel discussions, videos, webinars, class discussions and field trips. In-class exercises could draw upon client-submitted projects and involve role playing where, for example, students might take on the roles of a developer, heritage advocate,



heritage planner, or other stakeholder. This immersive approach would challenge students and intensify the learning experience.



## PRINCIPLES OF HERITAGE CONSERVATION

Figure 7: Key Messages: Principles of Heritage Conservation<sup>10</sup>

A **continuous learning model** within the Certificate program generally would allow students enrolled in the program to access course readings and other web resources; carry out such assignments as attending heritage organization meetings; and participate in networking events scheduled between courses with heritage practitioners and stakeholders. For Certificate program continuity, the introductory course might provide a brief overview of other courses which, in turn, could include refresher sessions on conservation principles covered in the introductory course.

<sup>10</sup> Sam Hester (2016) Heritage Conservation Education Workshop Graphic Recording, EVDS, University of Calgary, May 31, 2016

## 4.2 - Heritage Conservation Policy and Planning Course

Workshop participants saw this course as a bridge from conservation theory and principles imparted in the introductory course (above) to their application in conservation practice. The written summary by the facilitator, Erin van Wijk, is included in Annex 3 and a graphic illustration of key messages by Sam Hester appears in Figure 8.

### *Course content:*

**Identification, protection, and management** of heritage resources are the three core components of the heritage conservation framework as it is practised in Alberta. Tools and skills essential to these functions are: research into historic places; the development and use of heritage surveys, inventories, Statements of Significance, and heritage management plans; and the application of the *Standards and Guidelines for the Conservation of Historic Places in Canada* to conservation decision-making.

**Conservation legislation and policies** in a municipal, provincial, federal and international context provide students a framework for action and professional practice. The course would impart an understanding of key players and stakeholders in conservation work and provide tools and strategies for responding to community values as they emerge through community engagement and advocacy.

**The economics of conservation** as addressed in the course would consider the business case for heritage, including return on investment and the use of proformas in rehabilitation projects the role of financial incentives such as grants and tax credits, and planning tools such as bylaw variances and density transfers.

**Conservation challenges** arising from building code compliance develop students' understanding of technical issues and solutions. Technical information provided in the course would be bolstered by contacts and resources in the consultant community.

### *Course delivery:*

**A cross-disciplinary teaching team** would consist of the primary instructor assisted by other faculty members and external expertise from conservation

planners, architects and consultants, heritage property owners, tradespeople and financiers. The course could be offered in partnership with other academic departments' resources and program offerings.

**Case studies** would serve as the primary teaching tool, to emphasize the practical application of conservation principles and methods and illustrate both good and less successful practices and outcomes. Examples would need to be selected carefully to present a range of projects in sufficient detail that the case studies retain real-world relevance for students.



## HERITAGE CONSERVATION POLICY & PLANNING

**Figure 8: Key Course Messages: Heritage Conservation Policy & Planning<sup>11</sup>**

<sup>11</sup> Sam Hester (2016) Heritage Conservation Education Workshop Graphic Recording, EVDS, University of Calgary, May 31, 2016

**Varied instructional methods**, as with the introductory course, could consist of lectures, class discussions, and group and individual exercises. Exercises might include the development and application of a conservation plan and proforma to a specific site with the objective of determining a project's feasibility. Videos and presentations would provide the majority of case study material, since time and logistical constraints might allow only a single field trip within the block week. Course material and exercises would need to be varied to sustain student interest and to challenge participants with material beyond their immediate areas of professional expertise.

**Pre-course assignments** presented by each student to the class would maximize the learning experience within a block week format. Web-based resources could provide pre-course readings of case studies, conservation terms and resources, and offer a forum for student interaction.

### **4.3 - Sustainability and Historic Preservation Course**

A summary authored by the facilitator of this group, Fraser Shaw, is included in Annex 4 and a graphic illustration of key messages appears in Figure 9. Three thematic clusters emerged from this workshop discussion:

**Sustainability understood holistically** implies a robust approach to heritage conservation –the conservation of landscapes, cultural environments, buildings, sites, as well as the stewardship of built, indigenous, and intangible heritage. Sustainability understood in this way is multifaceted and has ecological, social, cultural, economic dimensions that demand an interdisciplinary approach to heritage conservation practice. Heritage conservation and sustainability share values-based frameworks: contemporary heritage conservation is underpinned in part by environmental stewardship and, in turn, could contribute to a “post-LEED” development model that embraces ecological, social, and cultural considerations.

**Sustainable building technology** looks both to the past to traditional building practices and forward to new technologies. The intrinsic link between conservation and sustainability lies both in the energy embodied in materials and assemblies of existing building stock and in traditional designs reflecting



generations of adaptation to local environmental conditions. The Sustainability course would develop a technical understanding of materials conservation and an appreciation for the vital importance of maintaining and reviving traditional building knowledge and trades skills. It would explore adaptive reuse and rehabilitation strategies for historic buildings through alterations and retrofits with high-efficiency systems – many of which may in fact be exemplified in new construction but which can be adapted to and integrated within legacy buildings.

**Community engagement and advocacy are essential** to both cultural and environmental sustainability. Heritage conservation depends on winning support from decision makers and the public. A course in sustainable heritage conservation would consider the essential roles of advocacy and community and political engagement in entrenching heritage conservation within political discourse.

*Course delivery:*

**An interdisciplinary emphasis** in the curriculum exposes participants to a wide variety of ideas, practitioners (instructors), and expertise. The course objective would be to survey key issues and show students where to find additional specialized expertise when it is required. Additional Certificate courses might be considered for such topics as the application of building codes to adaptive re-use. Certificate course content might also vary in response to the expertise and interests of participants and instructors but a flexible curriculum would need to ensure the coverage of core content.

**A mix of class lectures, field trips, and group exercises or projects would balance theory and hands-on experience.** Pre-course readings could maximize use of the block week for field trips and instruction and could be a pre-requisite for participants with diverse professional backgrounds and at different stages in the Certificate program. Students could submit a pre-course questionnaire to help instructors tailor content to varying professional interests and levels of expertise.

**Pre-course readings** could maximize use of the block week for field trips and instruction and could be a pre-requisite for participants with diverse professional backgrounds and at different stages in the Certificate program. Students could



submit a pre-course questionnaire to help instructors tailor content to varying professional interests and levels of expertise.



## SUSTAINABILITY & HISTORIC PRESERVATION

Figure 9: Key Course Messages: Sustainability & Historic Preservation<sup>12</sup>

Course material should draw upon technical resources from English Heritage, Parks Canada, the U.S. National Parks Service’s Preservation Briefs and Preservation Technical Notes series; Getty Institute resources; the Architectural Review; and Association for Preservation Technology (APT) Bulletins. Case studies of conservation and sustainability best practices would be diverse in scope, type, and location to be relevant to a range of practitioners. These cases

<sup>12</sup> Sam Hester (2016) Heritage Conservation Education Workshop Graphic Recording, EVDS, University of Calgary, May 31, 2016

would be broad in focus, potentially everything from the adaptive re-use of churches and industrial sites in different countries, to more local examples such as the Medicine Hat Historic Clay District. Strategically planned field trips would minimize travel and maximize course time.

**Assignments** could include an initial class presentation by each student to show their professional work and build class rapport. A week-long interdisciplinary group project could have students collaborate in a real-world project by role playing with fellow students, instructors or external resource people in a client-consultant scenario. The success of this approach would depend on class diversity and participants' individual skillsets.

#### **4.4 - Advanced Heritage Conservation Project Course**

A written summary by the facilitator of this group, Stefan Ceislik, is included in Annex 5 and a graphic illustration of key messages is presented in Figure 10.

##### *Course content:*

The group discussion identified several essential course outcomes. The course would give students a deep understanding of the complexity of heritage conservation projects and the importance of values and meanings in historic place conservation. It would also provide an opportunity for students to understand the day-to-day work of heritage professionals through the practical application of conservation tools and processes. This experience would instil confidence in heritage resources' adaptive re-use potential and their value to communities. To offer a meaningful accreditation to work within the industry, this "capstone" course would specifically address the following topics:

**The preparation of a comprehensive conservation proposal for a historic place** is the objective and organizing framework for this course. Taking site and context into consideration, students would articulate the nature of the interventions, key treatments, and impacts to heritage value and character-defining elements in accordance with the *Standards and Guidelines* and present their plans to a provincial or municipal regulatory authority (or someone acting in that role for course purposes). The proposals would address regulatory requirements, assess risks and present incentives to stakeholders and clients. As part of the process

and if feasible, students might also develop Statement of Significances based on research, interviews, and site visits. Opportunities also exist to explore the socio-cultural, economic, and ecological sustainability factors that influence designation and impact ongoing management of historic places.

**Real-world case studies** would give practical experience in engaging with conservation issues and the application of the conservation framework – identify, protect and conserve – to actual projects. The emphasis would be on projects in Alberta, local materials and climatic considerations, while recognizing how these projects fit within a wider national and international context. Case studies would illustrate historic places’ diversity, the complexity of conservation projects, and the need for a range of approaches and, in some cases, specialized consultants and contractors to achieve successful outcomes.

**Engaging in a conservation project from inception to completion** would teach students how to work consistently within Alberta’s regulatory framework, using Statements of Significance and the *Standards and Guidelines* in a conservation process that evolves as understanding of a historic place develops and influences final objectives. Other conservation project management and risk management skills would include budgeting, project scheduling, and the role of grants and other incentives.

**Identifying values and engaging with stakeholders** is an essential part of the conservation process. Students must be able to understand the perspectives of heritage property owners, project proponents, consultants, and regulators and be able to engage with these stakeholders as appropriate.

**An interdisciplinary approach** recognizes the complex and multifaceted nature of historic places as well as the need for the course to address a broad audience with a range of skills and experience.





## ADVANCED HERITAGE CONSERVATION PROJECT

Figure 10: Key Course Messages: Advanced Heritage Conservation Project<sup>13</sup>

*Course delivery:*

**This final “capstone” course would build on the other Heritage Certificate courses** and could only be taken after these courses had been completed.

Instruction methods would be flexible and might include field trips, case studies, charrettes, studios, seminars and guest lectures. The five-day block course could begin with a one-day introductory session followed by reviews of core concepts (identify, preserve, protect), with guest lecturers and student discussions, over

<sup>13</sup> Sam Hester (2016) Heritage Conservation Education Workshop Graphic Recording, EVDS, University of Calgary, May 31, 2016

the succeeding three days. Project presentations by student groups would take place on the final day.

**Course projects** would be historic buildings, heritage districts, or cultural landscapes chosen to be broadly comparable in scale and complexity for the purposes of this exercise. Each project team, consisting of perhaps five students, would be presented with a terms of reference provided by project sponsor within government or the private sector. Students would then submit a detailed proposal to instructors or sponsors and then proceed to research the site and prepare the conservation plan. Groups would present their recommendations to the class, with guest lecturers or project sponsors providing a critique. Contacts with project sponsors might open valuable opportunities for mentoring, internships, or possibly a co-op work program.

#### **4.5 - General Remarks**

The discussion groups offered the following general comments on course content and structure within the Certificate program as a whole:

- Certificate courses should be interdisciplinary and balance theoretical and practical perspectives.
- A strong organizational framework would be needed to develop a course/program support network of guest speakers and resources.
- Can Certificate courses accommodate, and be relevant to, participants from divergent backgrounds and levels of expertise and specialization? The Certificate program's appeal would depend on its applicability to the professional practice of participants (and their employers).
- To what degree would each course be able to stand on its own? Taking the Sustainability course without, for example, a grounding in conservation principles might be difficult.
- If Certificate courses were to be taken sequentially, courses would ideally reinforce each other but not overlap excessively in content.
- Indigenous heritage and archaeological resources were acknowledged as important but their place within a program on built and landscape heritage conservation was unresolved in group discussions.



- Currently none of the courses provides an opportunity to engage with building materials, craft practices, or knowledgeable tradespeople, all of which are essential to the conservation process and successful outcomes. The existing course structure could be adapted to include materials-based concepts.

#### **4.6 - Concluding Comments**

The Heritage Conservation Education Workshop at the Faculty of Environmental Design provided a rich, productive and energized discussion on the future of heritage conservation training in Alberta and the educational needs of heritage professionals. The involvement of over fifty experienced heritage professionals, educators, industry experts and members of provincial, municipal and community organisations provided an exciting opportunity for a focused debate on course content and delivery summarized and illustrated in this report. The support from Alberta Culture and Tourism, the Alberta Historical Resources Foundation and the City of Calgary, as well as the energy and commitment of many volunteers (professionals and EVDS students and staff) made this event a success.

The workshop demonstrated there is a need for conservation education opportunities for mid-career professionals in Alberta and that EVDS is well positioned to offer a Certificate program that complements existing Faculty programs; builds on synergies between the Faculty, the University of Calgary, and industry and public sector partners; and that it can be competitive with, and complementary to offerings at other post-secondary institutions. While much work remains to be done, the workshop discussions provided a clear blueprint for development of the Certificate program curriculum. The Faculty is grateful for the contributions of workshop participants and facilitators to this constructive one-day dialogue and critical reflection on heritage conservation education. The breadth of experience and diversity of perspective participants brought to the discussion will shape the curriculum and the pedagogy of the Certificate and enrich this interdisciplinary program offering in the future.

## ANNEX MATERIALS

### **Annex 1: Course Descriptions, Workshop Agenda, and Focus Groups**

#### **Course Descriptions of the Built and Landscape Heritage Certificate<sup>14</sup>**

##### **Principles of Heritage Conservation (3-0)**

This course provides a foundation to heritage conservation. The course will focus on principles and theories pertaining to preservation and restoration practices; recognition of architectural periods, styles, and construction methods in context of the evolution of cultural landscapes; the definition of significance and integrity in buildings and districts; strategies by which buildings and their settings have been preserved and used; and methods of reading and interpreting the cultural environment. It will also include a review of the most up to date research in heritage conservation.

##### **Heritage Conservation Policy and Planning (3-0)**

This practice-based course prepares students to act in some capacity as manager, architect, planner, and policy maker for historic sites and buildings. The conservation professional is expected to have an understanding of heritage design and aesthetics; materials conservation; public policy and land use bylaw; value-based management, real estate and community planning issues related to heritage projects. As such, this course will serve as an overview of the aspects of heritage conservation related to policy and planning. The course reviews preservation policy and jurisdictional issues within a community development context, addresses complex social equity considerations associated with historic designation, examines economic incentives, and explores preservation philosophy and historic impact assessments. The course will include various site visits to heritage sites and lectures from invited experts.

##### **Sustainability and Historic Preservation (3-0)**

This course examines the role of historic preservation the context of pragmatic social, economic and environmental imperatives of sustainable community development. Topics to be addressed include a range of historic examples of sustainable cultural practices, building envelope assessments, pathology and retrofit of heritage buildings, current trends of adaptive reuse of historic sites and case studies of effective implementation of heritage legislation in historic buildings. Although grounded in international experience and precedents, the courses will emphasize relevance to western Canadian history and regional building traditions. The course will include various site visits to heritage sites and lectures from invited experts.

##### **Advanced Heritage Conservation Project (3-0)**

The advanced project based course provides an opportunity to work in an interdisciplinary manner to address real issues related to heritage conservation. It will include the development of a comprehensive heritage conservation proposal based on site and context analysis of a site in Alberta. The project will use the framework of the Historic Places Initiative (Identify, Protect and Preserve) to document buildings, districts and cultural landscapes and to interpret their historical and architectural significance. An Identification component would consider heritage resource documentation and evaluation; a Protection component would review heritage legislation, regulatory frameworks, and incentive programs; and a Preservation component would examine standards and guidelines, and preservation strategies and techniques.

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<sup>14</sup> EVDS (2016) Built and Landscape Heritage Certificate Proposal. Calgary: EVDS, University of Calgary.

## Heritage Conservation Education Workshop

### Agenda

Chair: Sasha Tsenkova, Professor, EVDS

09:30-10:00	Registration and networking over coffee and pastries
10:00-10:05	Opening Remarks - Nancy Pollock-Ellwand, Dean, EVDS
10:05-10:20	Historic Places Initiative and its Impact on the Canadian Conservation Landscape - Larry Pearson, Director Historic Places Stewardship Programs, HRMB, Alberta Culture and Tourism
10:20-10:40	Heritage Conservation Training in Canada - Chris Wiebe, Position, National Trust
10:40-11:00	New Certificate on Built & Landscape Conservation, Sasha Tsenkova, Professor, EVDS
11:00-11:15	Break
11:15-12:15	Facilitated Group Discussion: Knowledge and Skills What issues need to be addressed in the curriculum? What are the priority topics?
12:15-12:45	Group Summaries of Discussion
12:45-1:30	Lunch
1:30-2:30	Facilitated Group Discussion: Training Delivery Models What are the best teaching strategies for professional training? How do we achieve desirable learning outcomes?
2:30-3:00	Group Summaries of Discussion
3:00-3:15	Break
3:15-4:00	Wrap-Up Discussion moderated by Larry Pearson, Director, Historic Places Stewardship Programs, Alberta Culture and Tourism

## Participants

**Workshop Chair:** Sasha Tsenkova, Professor, EVDS

**Workshop Moderator:** Larry Pearson, Director, Historic Places Stewardship Programs, Alberta Culture and Tourism

## Focus Groups

### **Group 1: Principles of Heritage Conservation**

**Facilitator:** Bob van Wegen  
Planning and Communications,  
Community Engagement, Heritage  
Conservation

**Recorder:** Crystal Amber Jackson  
University of Calgary Master of  
Planning Student

#### **Participants:**

Conley, Merinda	Principal, Community Design Strategies Inc.
Hardy, Michele	Curator, Anthropologist
Hirano, Robert	Conservation Architect, Lethbridge
Marsall-Moritz, Nikolas	Project Engineer Red Jones Christoffersen Ltd
Oberlander, Judy	Judy Oberlander and Associates, University of Victoria
Pasacreta, Laura	Donald Luxton and Associates, Project Manager
Pollock-Ellwand, Nancy	Dean, EVDS
Sinclair, Brian	Professor, EVDS
Ward, Tom	Head of Heritage Conservation Advisory Services, Alberta Culture and Tourism

### **Group 2: Heritage Conservation Policy and Planning**

**Facilitator:** Erin van Wijk  
City of Calgary Heritage Planner 2

**Recorder:** Magda Wojtalewicz  
University of Calgary Master of  
Planning Student

**Participants:**

Boisvert, Samuel	Project Analyst, Donald Luxton and Associates
Kalman, Harold	Commonwealth Historic Resource Management Ltd
Levy, Richard	Professor, EVDS
Manweiler, Brenda	Manager, Historic Places Research and Designation, Alberta Culture and Tourism
Murray, David	Conservation Architect, Edmonton
Partridge, Allan	Conservation Architect

Reid, Michelle	Conservation Landscape Architect, City of Calgary
Shrive, Nigel	Professor, Civil Engineering, University of Calgary
Traptow, Josh	Calgary Heritage Authority, Executive Director AHRF Board Member
Walker, Asia	City of Calgary Heritage Planning Summer Student
Weibe, Chris	Manager, Heritage Policy & Government Relations, National Trust for Canada

### **Group 3: Sustainability and Historic Preservation**

<b>Facilitator:</b>	Fraser Shaw	Heritage Conservation Advisory Service
<b>Recorder:</b>	Zach Hoefs	University of Calgary Master of Planning Graduate

<b>Participants:</b>	Chambers, Mark	Conservation Archivist, PWGSC
	Dawson, Peter	Educator, Anthropology and Archaeology
	Farrokhi, Alireza	Head, Conservation and Construction Services, Alberta Culture and Tourism
	Geldart, Robert	City of Edmonton, Senior Heritage Planner
	Halladay, Laurel	Educator, Athabasca University, AHRF Board member and acting Chair
	Kirchner, Jennifer	City of Lacombe, Planner, AHRF Board Member
	McMordie, Mike	Professor Emeritus, EVDS
	Morgan, Ian	Associate Architect, Group 2 Architecture and Interior Design
	Oakley, Brian	Director, Facility Planning and Architecture Section, Alberta Infrastructure
	Rusted, Brian	Associate Professor of Art, University of Calgary
	Walls, Matthew	Assistant Professor, Anthropology and Archaeology, University of Calgary
	White, Christopher	Director, Environmental Health and Safety, University of Calgary

### **Group 4: Advance Heritage Conservation Project**

<b>Facilitator:</b>	Stefan Cieslik	Heritage Conservation Advisory Service
<b>Recorder:</b>	Jeanette Burman	Master of Environmental Design Student

<b>Participants:</b>	Almond, Terry	Contemporary Architect, Parks Canada Agency
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Cariou, Darryl	City of Calgary, Portfolio of Heritage Buildings
Elkey, Chris	Canada Lands Company
Inanloo Dailoo, Shabnam	Assistant Professor, Athabasca University
Klaassen, Cynthia	President, Calgary Heritage Initiative
Nayeri, Ali	Heritage Conservation Technologist
Reid, James	Conservation Architect, APT Alberta Chapter President
Toker, Erik	Toker + Associates Sustainable Architecture + Interior Design
Williams, Marilyn	Heritage Management Consultant

## Annex 2: Discussion Summary on Principles of Heritage Conservation<sup>15</sup>

### Discussion Session 1: WHAT Content - Key issues

#### **Foundational: A Broad Survey**

This is a broad survey that includes global best practices and both traditional and emerging issues in conservation (the latter including, for example, intangible heritage). It is important that many facets of heritage conservation are touched on (even briefly) allowing for students to get an expansive understanding before tackling more specific topics and issues within the other courses, or elsewhere in their education or practice. The current course description is a bit narrow in wording; should include more about landscape heritage in addition to built heritage. To lay a foundation, *understanding before action*, this course should be a pre-requisite to the other courses.

#### **Historical Context and Narrative**

Heritage conservation has evolved over a long period and is still evolving – culturally and in terms of practice and techniques. Participants noted that the history of the field would be integral to this introductory course, and could be a narrative framework to organize the elements of the course. Evolution of techniques, skills, methods, policies and building science should all be addressed in this program. The continuing story/narrative was an important theme in this group.

#### **Common Language: basics and values foundation**

Impart a common language of heritage conservation: Words such as restoration vs. rehabilitation, etc. are often misunderstood/misused. A common language also comes from the understanding of legislation and associated conservation Standards and Guidelines, Charters, etc. (these elements should be highlighted and discussed – e.g. are they too restrictive or permissive, broad or narrow?). Cultural values and values of the public are also important to historic conservation, and conversation. What are these values that make conservation important to society? The **ethics** of historic conservation also are important and must be discussed in a foundation course. Make historic preservation REAL and INTERESTING to the student by discussing and highlighting its social, economic, environmental, and cultural benefits. Bridge the gap between the culture of ‘new things’ and ‘immediacy,’ and the importance of historical development over time.

#### **Operationalization: How does heritage conservation truly work?**

What elements enable conservation to happen? There is a continuum including communication, negotiation, mediation, education, persuasion, advocacy and political action; students should be exposed to this. It is also important to explain the “business case” of historic preservation; the economics of it. Do boom and bust cycles affect the discipline? Why partake in conservation? Many disciplines/approaches are required in heritage conservation – architects, historians, planners, engineers, financiers, etc.... An interdisciplinary approach should encourage students to break down ‘silos’ that exist today. (It was said, for example, that the culture of architecture in schools today is mostly about new/original structures/visions rather than appreciation of context, adaptive-reuse, and incorporating pre-existing structures.)

#### **Community role**

There was discussion around the community’s role in historic conservation: community engagement, and the dialogue between community values and conservation that forms part of the narrative of the field. Heritage conservation’s relationship to public memory and stories of

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<sup>15</sup> The written summary was prepared by the facilitator of the focus group, Bob van Wegen, and edited by Sasha Tsenkova.

place; we can learn much more about places that are important from public engagement strategies. Historic conservation was also discussed as a system of capacity building related to interpretation and advocacy. Grassroots initiatives can arise from people working together to further the importance of heritage to our society. Public support, and political, policy and economic support for heritage conservation are related.

### **Session 1: Top 5 Priorities**

1. **Explore the state of the art**
  - Built environment but also landscape/natural environment, intangible heritage (broad survey)
  - Interdisciplinary
  - Discuss on a broad scale the social, economic, environmental, and cultural benefits
2. **Relay the evolution/historic narrative/background of the field**
  - Origins through to current trends – a framework for exploring issues
  - Discuss its dynamism
  - Understand techniques, skills, and methods of historic conservation (new & old)
3. **Impart a common language of historic conservation**
  - Impart a common vocabulary to discuss field
  - What values underlay historic conservation
  - What ethics are involved when we talk about historic preservation
  - Current guidelines, standards, and charters
4. **Discuss historic conservation's operationalization**
  - Continuum from communication/education to advocacy/politics
  - Economics of historic conservation; what is the business case?
  - Policies and politics of historic conservation (legislation/inventory)
  - Aspects of field  
(communication/negotiation/mediation/education/persuasion)
  - Discuss importance of being interdisciplinary (work with many industries/disciplines/school programs)
5. **Explore the community/public role**
  - Historic conservation is also about the PEOPLE and their MEMORY
  - Vital advocacy and support role
  - Capacity building / grass roots
  - Community engagement is a vital component of historic conservation
  - We must be aware of what the people know and value

### **Discussion Session 2: HOW - Key Issues**

Theory needs to be balanced with practice. Not only in the certificate program, but also in this course by grounding the discussion of principles, values, etc. in “real world” examples.

**Case Studies:** Real world connection via historical overviews, and local or world case studies. These overviews and case studies could show ‘the good the bad and the ugly’ type scenarios, as well as incorporating examples at varying scales of projects, from individual buildings to streetscapes/neighbourhoods. Small town and rural examples would be important to many of the practitioners, in addition to more urban/Calgary examples. Main Street programs would be

good resources. Case studies that involve pending heritage-related projects could be of use for teaching and/or assignments. Also case studies related to client-submitted projects.

It was suggested that students as part of a pre-block course (or pre-class) assignment could find their favourite (or most disliked) example of heritage conservation and bring it to the first class as an 'ice breaker' or mode of personal introduction to kick off discussion.

**Mix of teaching/delivery methods:** A broad array of teaching methods was discussed. By utilizing various approaches, and different voices, students will stay engaged over the longer days of study. Examples discussed in this group were videos, webinars, guest lectures, site visits/area tours, short practicums with field work, client-submitted projects, role playing, panel discussions (for example, a panel including a developer, a heritage advocate, a heritage planner, etc.), group and individual work, class discussion, and again, case studies. This course and the program as a whole should incorporate immersive learning. It should offer hands-on and interactive experiences in addition to lecture based learning. (It was suggested that students are most creative and challenged in "uncomfortable" situations, which immersive learning can provide.)

**Continuous Learning Experience:** The program should offer a continuous learning experience that connects the four block weeks, starting at the broad underlying basics (block 1) to a real world project (block 4). It was suggested that *Principles of Historic Preservation* be a mandatory pre-requisite and *Advanced Heritage Conservation Project* should only be taken after all other three have been completed. The continuous learning experience may start at enrollment, with pre-assigned readings. There may also be pre-course/class assignment - such as to show up at the first class with a case study/example for discussion. The experience may continue between courses with further readings or networking opportunities, perhaps facilitated by a web resource available from enrolment through completion. A between-courses assignment might be to attend a heritage group committee meeting, for example. For continuity, a brief overview of heritage pedagogy in each of the four courses. (The Principles class could be condensed and used as a review for the beginning of the other classes.)

**Strong organizational and support framework:** Another topic that was highlighted was the need for course content to be succinctly organized before the start of the class - due to the short time frame of the class, and the need for pre-course readings or assignments. A teaching framework should be put in place ahead of time. A strong organizational framework is also needed to support networking (see below) and to develop and access resources such as guest speakers, guest panel members (see Mix of Teaching/Delivery Methods).

**Networking Opportunities:** The certificate program is an opportunity to build a network of heritage professionals and supporters, for the benefit of the participants, the faculty and the broader heritage community. The heritage conservation certificate should provide networking opportunities; the participants thought this would be a unique and beneficial element of the program. Perhaps EVDS could facilitate a meet and greet night with heritage professionals from a variety of industries. This aspect would also aid in the interdisciplinary goals, which participants stressed is important to the future of heritage conservation.

**Overall comment:** the participants believed that these ideas can be used throughout the entire program and not necessarily just with this particular course. Bridging the gap between theory and practice should be the ultimate goal, and a highly organized and connected program will be successful in getting more students and people involved in heritage conservation.

## **Session 2: Top 5 Priorities**

### **1. There should be a real world connection**

- Historical overviews
  - Case studies (local & worldwide) (best practices & 'bad' examples)
2. **Program should utilize a variety of teaching methods**
    - Pre-class readings
    - Guest lectures from industry experts (local & worldwide)
    - Webinars, Videos, Site visits
    - Panel discussions (developer, city planner, citizen, indigenous member, etc.)
    - Lecture, Studio,
    - Short practicum Class discussions
    - Group and individual work
    - Use previous students' best work for examples
  3. **Program should focus around immersive learning**
    - Hands-on, Interactive
    - Field work
    - In-person site visits (ex. Inglewood)
  4. **Connectivity throughout heritage program**
    - Importance of linkages between all four courses
    - Continuous learning (from pre-readings through to post lecture assignments/reflections)
    - Administrative organization and communication is very important between all courses, including having resources available online from enrolment to completion
  5. **Networking opportunities**
    - Event(s) to allow for students to connect with heritage industry members
    - Have students attend a heritage committee meeting

**Other Issues / Highlights:**

- Address the public realm community-level urban design guidelines – how new buildings or urban design elements fit into/address an older historic context.
- World heritage at risk. Heritage loss from war, fire, flood, etc. could be an interesting topic in relation to sustainability and resiliency. How do we respond to these sorts of disasters?



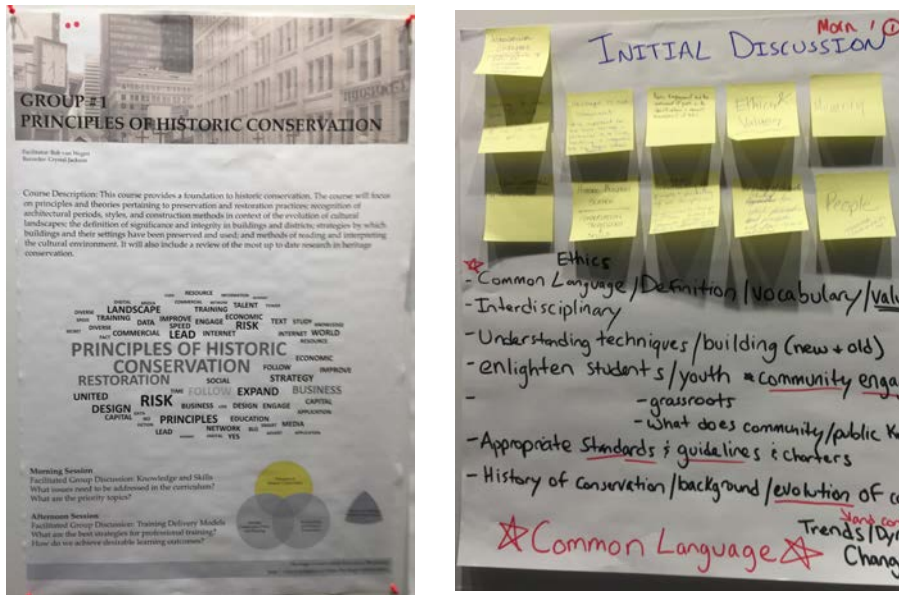


Figure 11: Posters Recording Group Ideas

## Annex 3: Discussion Summary on Heritage Conservation Policy and Planning<sup>16</sup>

### Discussion 1: WHAT Knowledge and Skills

**Course Goals:** SOCIAL – ECONOMIC – ENVIRONMENT

- Bridge Theory (from the first course?) & practice.
- Understand the benefits of heritage (besides ‘altruistic’)
- Adapting approaches to different contexts

### Priority Topics:

1. **Legislative Framework**
  - Working within the policy framework (AB specific)
  - Policies in other cities/countries
  - The legislation (or lack of) that facilitates Heritage Identification – Protection – Management
2. **The “Players”**
  - The politics of preservation
  - Ethical challenges; local values & ethics & social benefits
  - Stakeholder engagement & management; working as allies not enemies - advocacy

<sup>16</sup> The written summary was prepared by the facilitator, Erin van Wijk, and edited by Sasha Tsenkova.

3. **Incentives & Tools** *\*significant amount of course time*
  - Financial incentives; grants, taxes
  - Planning incentives such as density transfer, bylaw variances, etc.
  - Building Code complexities and solutions
  - How the S.O.S is used as a management tool
  - How to use the Standards & Guidelines
  - What are Inventories – Districts – Windshield Surveys?
  - What is and how to use a Heritage Management Plan; the processes involved
4. **Practical**
  - The New Heritage Dictionary
  - The 'business' of conservation (researchers, consultants, specialists...)
  - Return on investment and the importance of understanding this
  - Proformas & the economics of heritage projects
  - Heritage investment & assets

## **Discussion 2: HOW Training Delivery Models**

- Bridge Theory (from the first course?) & practice.
  - Understand the benefits of heritage (besides 'altruistic')
  - Adapting approaches to different contexts.
1. **Teaching team:**
    - Cross disciplinary, variety of experience
    - Partnerships: with other courses, depts., external groups
    - Variety of experts: trades, financiers, planners, owners, architects, conservators etc.; one primary instructor with many experts/presenters on hand
  2. **Strategies & delivery:**
    - Real world application, applying the main topics in practice
    - Testing doctrine to real world; good/bad/ugly scenarios
    - Balance between group & individual work
    - Content – exercise – discussion/lecture
    - Videos – Live presenters
    - A variety of practitioners presenting: trades, financiers, planners, owners, architects, conservators etc.
    - Max. 1 day field trip as case studies can be presented more timely by video/text/presenters
  3. **How:**
    - Case Studies *\*primary teaching tool*, Cases at a variety of scales (small-large, local-external, good-bad)
    - Working with a Conservation Plan: site specific
    - Proformas: what and how
    - Understanding feasibility of projects, seeing a project from A to Z
    - Reviewing cases at a variety of stages (complete or not); active cases: cases that may not have a defined end could be a learning opportunity to apply what's been learned
    - Assignments: group & individual & in-class; presentations by students
    - Due to time limits a pre-course assignment is good; pre-course reading of case studies, terms, definitions (use on-line as a tool)
    - Web-based interaction with course works and other students

#### 4. Challenges:

- Balancing case studies with in class academic, ensure students don't fall back on their existing expertise/knowledge
- Site visit logistics can waste valuable time
- Balancing student's existing background/knowledge
- Keeping level of interest all day
- Awareness of all the people involved in a process can get quite unwieldy with case studies

#### Additional general Certificate discussion/questions:

- It seemed unclear after the workshop which course would include the component of researching and writing a Statement of Significance? This is a key tool in management but is more tied to the theory of 'why' a site is valued'. Our team thought it would be covered in the first course but didn't notice it covered in their brainstorming sessions?
- Be conscious of course overlap
- Be definitive on WHO the audience for the program is
- Can other students at UofC take these courses as elective or is it more of a "Continuing Education" program?
- Can courses stand on their own is will it be strongly encouraged that they are all taken together?
- How will this program contribute to the overall economy & jobs at a variety of scales?



Figure 12: Posters Recording Group Ideas

## **Annex 4: Discussion Summary on Sustainability and Historic Preservation<sup>17</sup>**

### **Session 1: WHAT (Content); Key issues**

- In the course, a values-based framework should consider sustainability in multiple dimensions – ecological, cultural, social, and economic. Heritage conservation in this context would follow a holistic “post-LEED” model of sustainability.
- Contemporary heritage conservation is underpinned by environmental stewardship. This course would build on the notions of energy embodied in materials and the intrinsic sustainability characteristics of traditional building design and construction.
- While course content would draw heavily on adaptive reuse models, exemplars of high-efficiency building technologies and systems (HVAC, etc.) may in some cases be illustrated in purest form in new construction. Such examples might then be adapted – possibly with technical compromises – to legacy buildings.
- Course content would convey a technical understanding of materials conservation along with an appreciation for the vital importance of the maintenance and revival of traditional building knowledge and trades skills. Thus, from a building technologies standpoint, a sustainability framework looks to the past to traditional building methods and practices as well as forward to new technologies.
- Conservation depends on winning hearts and minds of the public and decision-makers. Education in sustainable heritage conservation would communicate the importance of community and political engagement and the role of advocacy in entrenching heritage conservation within political discourse. Heritage values should be considered with, but not subverted to, ecological and other values.
- Sustainability understood holistically applies to “landscape” in the broadest sense – that is, to the conservation of cultural environments or landscapes rather than isolated buildings or sites, and to the stewardship of indigenous and intangible heritage in addition to built heritage conservation.
- The course might be titled “Sustainability and Historic Conservation” in recognition of the fact that much adaptive reuse would in fact be rehabilitation treatments involving alterations and additions.

### **Session 1: Priorities**

1. Sustainability is multifaceted (ecological, social, cultural, economic) and requires an interdisciplinary approach to conservation practice
2. Sustainability, like heritage conservation, presupposes and demands a values-based framework
3. Advocacy is essential to both cultural and environmental sustainability

### **Session 2: HOW (Type of Training)**

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<sup>17</sup> The written summary was prepared by the facilitator, Fraser Shaw, and edited by Sasha Tsenkova.

- Workshop participants affirmed that heritage professionals, students, and architects would be the course's target market.
- The course emphasis would be interdisciplinary in breadth in order to expose participants to a wide variety of practitioners (instructors), expertise, and issues. Participants would come away with an understanding of key issues and where to find additional expertise on specialized topics. It was acknowledged that follow-up courses might be required in such areas as, for example, the application of building codes to the adaptive re-use of historic buildings.
- Course content would balance theory and hands-on experience. Delivery would rely on a mix of class lectures, field trips, and group exercises or projects.
- One suggested model was to vary course content based on the background and expertise of participants and instructors. However, it might be difficult to offer such flexibility while assuring coverage of core content.
- Pre-course readings could help maximize use of the block week for field trips and instruction. Advance reading could deliver core content in advance and in effect serve as a prerequisite for participants coming from a range of professional backgrounds and at different stages in the certificate program. Students could submit a pre-course questionnaire to allow instructors to tailor content to varying interests and levels of expertise.
- An initial assignment presented by attendee reflecting their professional work could serve as an introduction to other students and build rapport within the class.
- Course readings can draw on the following resources: English Heritage, Parks Canada, U.S. National Parks Service Preservation Briefs and Preservation Tech Notes series; Getty Institute resources; the Architectural Review; and Association for Preservation Technology (APT) Bulletins.
- Case studies would illustrate conservation and sustainability best practices. Examples of best practices would encompass a spectrum of project types and scales to be most relevant to a range of practitioners. Case studies would be wide-ranging geographically and in resource type, drawing on examples both locally and internationally. Examples include adaptive re-use of churches and industrial sites, with examples of the latter being located in northern England as well as southern Alberta at the Medicine Hat Historic Clay District (Medalta Potteries, etc.).
- Fieldtrips would need to be planned strategically to minimize travel and maximize course time.
- Coursework could incorporate an interdisciplinary group project unfolding over the week, in which each participant is tasked according to their background and expertise and collaborates with others, as occurs in the "real world". The project could revolve around a real-world case study in which course participants, instructors or external resource people role play in a client-consultant scenario. Interdisciplinary projects might be problematic if many participants were to have similar backgrounds or if core issues or subject matter were to be underrepresented in participants' skillsets.
- Submission of follow-up or post-course individual assignments would have the benefit of maximizing course time on instruction but often come with the limitation of providing minimal feedback compared with in-class projects or exercises.

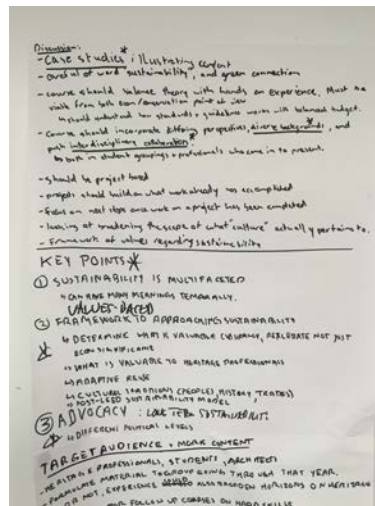
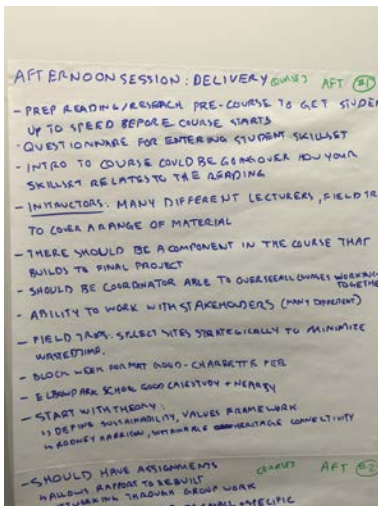
- There was some discussion concerning the degree to which the course would be able to stand on its own. Would it be feasible to consider sustainability in heritage conservation without, for example, first having the grounding in conservation principles imparted in the other certificate course? Is a sequence of certificate courses necessary?

## Session 2: Priorities

1. Course content should blend the theoretical and the practical
2. The course should be interdisciplinary rather than specialized in orientation
3. Content delivery should be multi-modal with a combination of formal lectures, group projects and field trips

## Other Issues/Highlights:

- There was some discussion as to whether an interdisciplinary course could be relevant and useful to participants from divergent backgrounds and levels of expertise and specialization. The applicability of program content to participants' professional practice would be essential in their justifying the educational investment to employers.
- The recognition and conservation of indigenous heritage and of archaeological resources arose several times in the discussion. It was unclear how the conservation of built or tangible and intangible heritage could be integrated within the course curriculum.





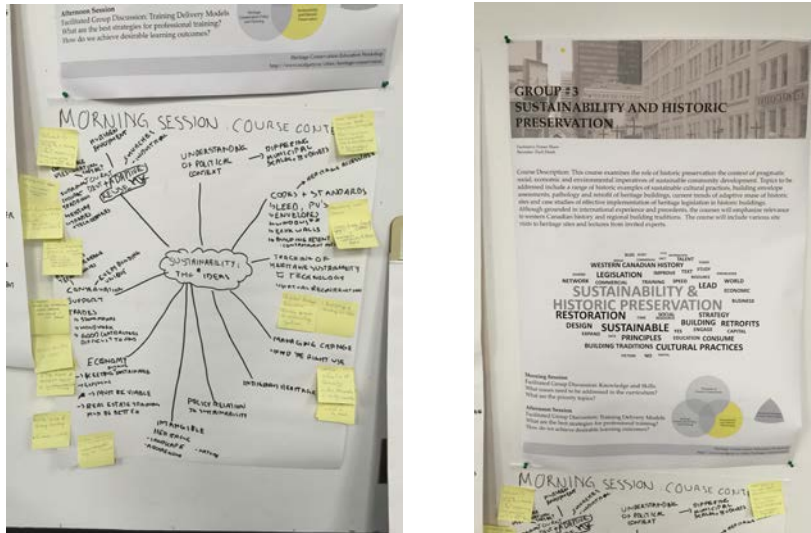


Figure 13: Posters Recording Group Ideas

## Annex 5: Discussion Summary on Advanced Heritage Conservation Project<sup>18</sup>

### Session 1: WHAT (Content); Key Issues

- Gain an understanding of how to apply a framework such as **identify, protect and preserve** in the real world.
- **Project / risk management** skills specifically focused on *conservation* should be emphasized: budgeting, scheduling, grants, incentives.
- Students need to understand how to work **consistently** within the regulatory framework of conserving historic places in Alberta, utilizing *Statements of Significance* and the *Standards and Guidelines*.
- Students must be able to **identify values** and **understand perspectives** of the various **stakeholders** in a heritage conservation project, who they are (owners; consultants; regulators; proponents) and have an opportunity to **engage** with as many as possible.
- Heritage conservation projects encompass a broad **diversity of sites** and are often highly **complex**. **Every site is different**, requiring a range of approaches; specialized consultants and contractors to achieve successful outcomes.

### Session 1: Priorities

1. Must utilize **real world case studies**; engage with real issues.
2. Need to **support an interdisciplinary approach**, recognizing that the course will address a broad audience, possessing a range of skills and experience.

<sup>18</sup> The written summary was prepared by the facilitator, Stefan Cieslik, and edited by Sasha Tsenkova.

3. **Needs to build on the outcomes and deliverables of the three other courses.** Cannot exist in isolation from the other courses and should be the final course once all three preceding courses are completed.
4. Should be an emphasis on understanding the **sequence and process** within a heritage conservation project, recognizing its **ongoing** (evolutionary) nature, particularly where a growing understanding of an historic place alters final objectives.
5. Emphasis on conservation projects in the **local context** (Alberta) particularly with respect to **knowledge**, materials, and climate; recognizing how those approaches fit within the **wider context** (nationally, internationally).

### Session 2: HOW (Type of Training)

- Needs to be **flexible**, incorporating a **variety of methods** and **practical applications** to be effective including **field trips, case studies, charrettes, studio, seminars, guest lectures**.
- Co-op opportunities / mentoring / internships seen as very valuable.
- Students should be given an opportunity to **present what they have learned (as a group) to the class**.
- **Guest** lecturers or project sponsors could **provide a critique** or **mini-defense** for students.

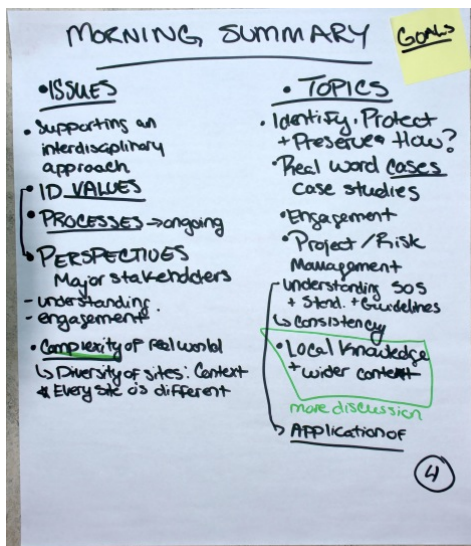
### Session 2: Priorities

1. Provide a meaningful **accreditation** to work within the industry.
2. Students should gain a **deep understanding** of the **complexity** of heritage conservation projects, along with the importance of **values** and **meanings** in historic places.
3. Opportunity to gain **real practical experience; 'walk the walk'; understand what heritage professionals do through applied heritage process project**.
4. Should instill **confidence in heritage** for adaptive reuse and reinforce its value to communities.

### Other Issues / Highlights:

- Currently none of the courses provides an opportunity to engage with building materials, craft practices, or knowledgeable tradespeople, all of which are essential to the conservation process. The existing course structure could be adapted to fold in the more of the materials-based concepts.
- Language consistency in course title - the final project course uses the word conservation where this is not consistently used in other course titles.
- Assignment requires terms of reference for group or individual project, followed by a detailed proposal prepared by the student(s).
- An alternative approach to the terms of reference could utilize a project charter with a project sponsor, within municipal government or the private sector.

- Team projects should be encouraged. Three projects with groups of five students each appears workable, different projects having different scales and layers of designation could be a challenge. Projects need to be standardized among groups.
- The logistics of delivering the capstone project as a block course could be challenging. Tentative schedule over five days could begin with an one-day introductory session, followed by reviews of core concepts: identify, preserve, protect over the following three days, each incorporating a guest lecturer and student discussion, ending with presentation by student groups on the final day.
- Students could be presented with three choices of heritage sites in categories of building, district, or cultural landscape (1 real case study represented as a choice for each category), followed by pre-research and contact interview (2 weeks prior, 1 week prior given heritage site and group members, can begin to communicate).
- As a stated objective of the course is *development of a comprehensive conservation proposal based on site and context*, assignment could take the form of a proposal to a regulatory authority, provincial or municipal, for an intervention to an historic place. Students would need to articulate the nature of the intervention, key treatments, and impact to heritage value and character-defining elements in accordance with *Standards & Guidelines*. Proposed intervention / overall proposal would address regulatory requirements and also assess risks and present incentives for stakeholders and clients.
- Students might also develop a Statement of Significance using mixed approaches including research, interviews, and site visits (if feasible) including a brief description of the historic place, an assessment of its heritage value(s), and a list of its character-defining elements. Opportunities exist to explore the social/cultural, economic, ecologic sustainability factors that influence designation and impact the ongoing management of the site.



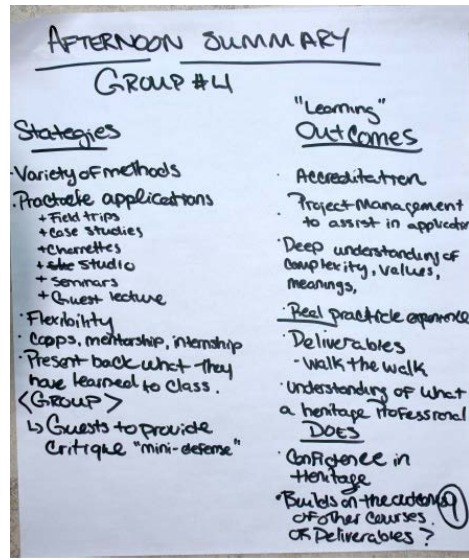


Figure 14: Posters Recording Group Ideas