ACO Branch Handbook

Discussion Draft – June 15, 2020

Architectural Conservancy Ontario

Branch Handbook

This document is intended to help recognized branches of The Architectural Conservancy of Ontario (ACO) achieve objectives, comply with governing law and effectively manage the administration of the branch. ACO has several sources that may also be helpful to ACO Branch leaders including the ACO Governance Handbook.

For ease of reference this handbook is structured as a series of questions and answers. If you do not find the topic of your question in the Table of Contents, please check the index in the back of the document.

Table of Contents

What is ACO?

1.1 Mission

Through education and advocacy, to encourage the conservation and reuse of structures, districts and landscapes of architectural, historic and cultural significance, to inspire and benefit Ontarians.

1.2 History

The Architectural Conservancy of Ontario (ACO) was founded in 1933 by University of Toronto Professor Eric Arthur. Professor Arthur was a distinguished architectural historian and critic. He is also known as the author of the seminal book on Toronto architecture, *Toronto No Mean City*.

The founding of ACO in 1933 was sparked by the saving of Barnum House near Grafton, now owned and operated by Ontario Heritage Trust. Dr. Eric Arthur came across Barnum House (Figure 1) in 1933 and, alarmed for its safety, purchased it for $4,000.00. In 1940, ACO acquired Barnum House from Eric Arthur and restored it throughout the 1940s and 1950s. In 1982, Barnum House became an historic property of the Province of Ontario, operated by the Ontario Heritage Trust. Barnum House is used by the ACO Cobourg and Northumberland Branch for its meetings.

Barnum House, Grafton Ontario
Built 1817-1819 by Ellakim Barnum, a United Empire Loyalist originally from Vermont

ACO formed its first branch, Hamilton-Niagara, in 1960, followed by Toronto (1963), Port Hope (1964), London (1966), Guelph (1969) and Cambridge (1970) branches. In the 1980s the North Waterloo (1980) and Quinte (1983) branches formed, followed by the Windsor, South Bruce Grey and Cobourg branches in 1995, 1997 and 1998 respectively. Meaford Branch formed in 2003, Muskoka and St. Catharines in 2006, Collingwood 2007 and Clarington, St. Thomas-Elgin and Stratford-Perth County in 2009.

Several other branches formed between 1972 and 2010, including Huron, Georgian Bluffs, Credit and Humber Watershed, Brighton, East Northumberland, Chatham-Kent, Brant County, often to try to save treasured heritage properties. Some later closed when membership dwindled or a key leader moved on.

2020 began with 20 branches ranging in size from Port Hope, Toronto and London with over 100 members each, down to eight branches with less than 10 currently paid-up members.

Despite the wide differences in size, all branches raise awareness of the importance of heritage conservation in their communities. Some organize annual Heritage Awards presentations. Some

organize lecture series and symposiums to educate people about architectural styles, notable local architects and structures and/or heritage conservation issues. Some make presentations to municipal councils advocating *for* heritage conservation enhancing programs like restoration grants and tax relief or advocating *against* poor stewardship or the proposed demolition of significant heritage properties. Some organize walking tours, heritage scavenger hunts, art exhibits or coordinate Doors Open to raise awareness of their community's built heritage. All branches typically participate in the annual Ontario Heritage Conference, organized jointly by ACO, Community Heritage Ontario, the umbrella organization for Municipal Heritage Committees in Ontario, and the Ontario Association of Heritage Professionals.

ACO has helped save hundreds of buildings all across Ontario, and raised awareness of the importance of preserving Ontario's provincial, municipal, and community heritage. The first organization to do such work, ACO pressed for heritage legislation and funding in Ontario, and has been followed in the field by such outstanding organizations as the Ontario Heritage Trust, Community Heritage Ontario, and the Canadian and Ontario Associations of Heritage Professionals.

The Corporation owns and operates Victoria Jubilee Hall in Walkerton and the Sheave Tower in Cambridge. It leases and operates the Caretaker's Cottage in Port Hope, and was involved with other partners in the restoration of the Town Hall in Meaford and the historic Port Hope railway station. Though ACO owns properties as a means to save them, the work of ACO primarily resides in offering support to advocates campaigning for the preservation of heritage sites, and through programs offering conservation advice to municipalities and heritage property owners.

To further sample ACO's rich history, the organization's 80th anniversary book, **80 for 80**, details 80 different heritage properties which ACO members actively worked to conserve. Copies are available from the provincial office. **Interventions to Protect** is an annually updated record of ACO members' efforts to conserve heritage properties around the province. It is available online at https://acontario.ca/show_res.php?r_id=22

1.3 Objects of Incorporation, 1982

 (a) To preserve, for the benefit of the people of the Province of Ontario, buildings and structures in the said province, of architectural merit and places therein of natural beauty or interest, and for such purpose or object, but without in any way restricting the generality of the foregoing expression thereof;

(b) To make, collect and preserve photographs, drawings, descriptions and other records of such buildings, structures and places and of the design, erection, alteration, ownership, occupation, use and history thereof;

(c) To mark by signs, tablet and inscriptions and otherwise to identify, describe and commemorate such buildings, structures and places;

(d) To adopt and use any means of making such buildings, structures and places known and appreciated

and, in particular, by means of advertising in the press, circulars, radio broadcasting, the purchase, sale and exhibition of works of art, history or interest, the publication of books, periodicals, reports, records, descriptions and maps, the holding or support of exhibitions and competitions and the grant of or contribution to prizes, rewards and donations;

(e) To protect, restore and maintain or assist in the protection, restoration and maintenance of such buildings, structures and places;

(f) To acquire by purchase, grant, lease, license, gift, devise, bequest or any other title, such buildings, structures and places or any rights or interests therein and any real or personal property and rights and privileges necessary or convenient for or calculated, directly or indirectly, to facilitate the attainment of all or any of the purposes or objects of the Corporation and to hold, manage, regulate, sell, exchange, lease, license or otherwise dispose of or deal with the same; in furtherance of the proposed objects.

(g) To enter into any arrangement for co-operation, reciprocal concession or other union, sharing or exchange of interests with any persons, associations or corporations owning such buildings, structures and places or having purposes or objects wholly or partly the same as or similar to those of the Corporation or capable of being carried out so as, directly or indirectly, to facilitate the attainment of all or any of the purposes or objects of the Corporation and to lend money to, guarantee the contracts or engagement of or otherwise assist such persons, association or corporations, to acquire securities from such persons, associations or corporations and to hold, assign, transfer, pledge or otherwise dispose of or deal with the same;

(h) To establish and support or assist in the establishment and support of associations, corporation, institutions, funds, trusts and other conveniences calculated, directly or indirectly, to facilitate the attainment of all or any of the purposes or objects of the Corporation and to subscribe or guarantee money for charitable or benevolent purposes for any exhibitions or for any public, general, artistic, scientific or useful object;

(i) To apply to the Legislature of Ontario or any public or municipal corporation, commission or authority in the Province of Ontario for any legislation, regulation, by-law, right or privilege calculated, directly or indirectly, to facilitate the attainment of all or any of the purposes or objects of the Corporation;

(j) To promote or assist in the promotion of any association or corporation for the purpose of acquiring or assuming any of the property or obligations of the Corporation or for any purpose calculated, directly or indirectly, to facilitate the attainment of all or any of the purposes or objects of the Corporation;

(k) To draw, make, accept, endorse, discount, execute and issue promissory notes, bills of exchange, bills of lading, warrants and other negotiable or transferrable instruments or securities;

(l) To do all or any of the foregoing things as principal, agent, contractor, trustee or otherwise and either alone or in conjunction with others; and

(m) To do all such other things as the Corporation may deem incidental or conducive to the attainment

of all or any of the foregoing purposes or objects.

1.4 What is heritage?

Our heritage is our inheritance - what the past has conceded to us, what we value in the present and what we choose to preserve for future generations. This definition includes:

- **the tangible** - our historical sites, buildings, monuments, objects in museums artefacts and archives.
- **the natural** - our waterways, landscapes, woodlands, native wildlife, insects, plants, trees, birds and animals.
- **the intangible** - our customs, sports, music, dance, folklore, crafts, skills, and knowledge.

Heritage is important to individuals and communities not only as an expression of identity, but also because it demonstrates what we value and prioritize. As such, heritage is a keystone of our culture that plays an important role in our politics, economics, attitude towards nature, society and world view.

Heritage conservation in Ontario has played a role in the revival of communities by creating:

- employment opportunities through cultural heritage tourism, heritage trades, main street revitalization, small business incubation and providing film and television locations;
- expanded housing stock by repurposing older buildings;
- environmental benefits and climate change reduction by acknowledging the embodied energy in our built heritage;
- waste reduction: saving and reusing buildings instead of demolishing them to make way for new construction reduces landfill and creates energy savings;
- enhanced sense of mental and physical wellbeing;
- a deep sense of cultural identity and community.

1.5 Legal status and governing legislation

Architectural Conservancy of Ontario is a registered charity with the Charities Directorate of the Canada Revenue Agency, and a not-for-profit corporation (Ontario). ACO's activities are carried out by a province-wide network of Branches and Members. The Canada Revenue Agency publishes a toolbox for directors, officers and volunteers to help them understand the requirements and obligations of maintaining charitable status https://www.canada.ca/en/revenue-agency/services/charities-giving/charities/operating-a-registered-charity/toolbox-directors-officers-volunteers.html. Also see Appendix A.

The provincial entity (ACO Inc.) is ACO's only corporate entity. Execution of deeds, transfers, assignments, contracts, obligations and other instruments or material commitments in writing requiring

execution by the ACO corporate entity may be signed by any two of ACO Inc.'s Officers or Directors in accordance with the approval process and protocols outlined in the ACO Inc. Finance Policy.

ACO's activities must comply many federal and provincial Acts. **Those Acts more frequently governing ACO's branch administration and activities** are listed below. For a full list with links see Appendix A.

Canada Business Corporations Act https://laws-lois.justice.gc.ca/eng/acts/c-44/

Canada Not-for-Profit Corporations Act https://laws.justice.gc.ca/eng/acts/c-7.75/

Corporations Act (Ontario) https://www.ontario.ca/laws/statute/90c38

Charitable Gifts Act (Ontario) https://www.ontario.ca/laws/statute/90c08

Charities Accounting Act (Ontario) https://www.ontario.ca/laws/statute/90c10

Environmental Protection Act (Ontario) https://www.ontario.ca/laws/statute/90e19

Freedom of Information and Protection of Privacy Act https://www.ontario.ca/laws/statute/90f31

Human Rights Code (Ontario) https://www.ontario.ca/laws/statute/90h19

Municipal Freedom of Information and Protection of Privacy Act (Ontario) https://www.ontario.ca/laws/statute/90m56

Not-for-Profit Corporations Act (Ontario) https://www.ontario.ca/laws/statute/10n15

Personal Information Protection and Electronic Documents Act (Canada)

https://laws-lois.justice.gc.ca/ENG/ACTS/P-8.6/index.html

Privacy Act (Canada) https://laws-lois.justice.gc.ca/ENG/ACTS/P-21/index.html

Trustee Act (Ontario) https://www.ontario.ca/laws/statute/90t23

Our heritage conservation activities are facilitated by:

Ontario Heritage Act https://www.ontario.ca/laws/statute/90o18 ,

the Planning Act, https://www.ontario.ca/laws/statute/90p13,

the Municipal Act https://www.ontario.ca/laws/statute/01m25 and

the Provincial Policy Statement, https://www.ontario.ca/document/provincial-policy-statement-2014

Canadian Environmental Protection Act https://laws-lois.justice.gc.ca/eng/acts/c-15.31/

1.6 ACO is a network of members

The Architectural Conservancy Ontario is a network of members committed to heritage conservation.

Our membership includes concerned citizens, homeowners, heritage tradespersons, architects and educators.

Not all members belong to branches, as can be seen by the attached map which gives an approximation of our reach in Ontario.

ACO is linked nationally to other heritage organizations in the private and public sector. We are affiliated with many other groups in academia, industry, government and the not-for-profit sectors.
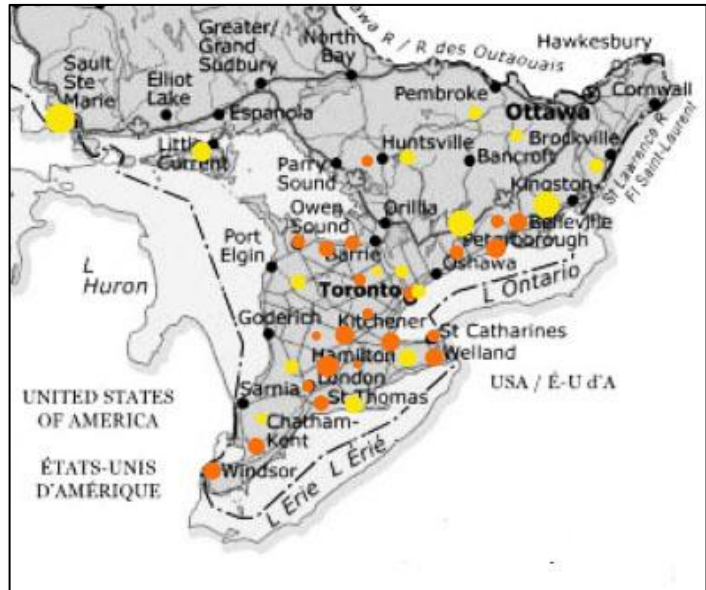
🟠 ACO Branches

🟡 ACO Individual Members/Enquiries/Agency Agreements

1.7 Organization of ACO Inc. (the provincial organization)

Since its founding in 1933 the Architectural Conservancy of Ontario has evolved to facilitate local action backed by the strength of a province-wide organization. This not-for-profit charitable organization operates through a province-wide network of local branches linked together electronically through a small coordinating office in Toronto, managed by staff, and governed by an Executive and Board of Directors as illustrated in the following diagram:

ACO Organizational Structure
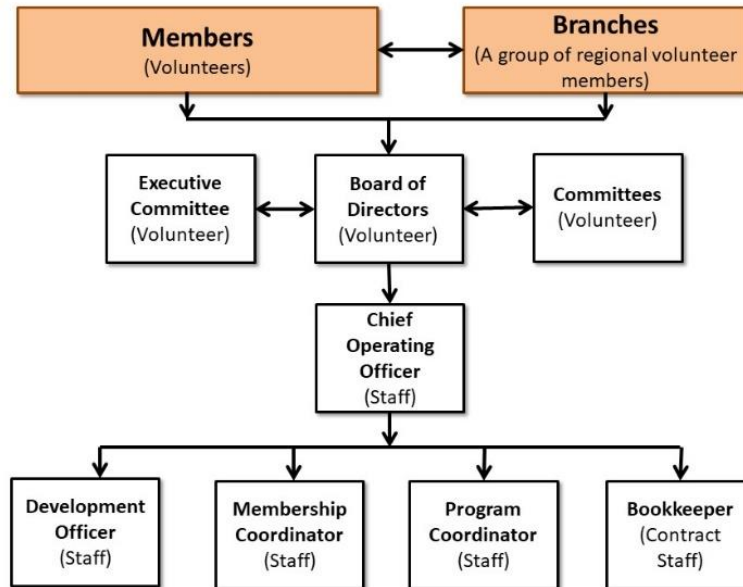
To learn more about how ACO Inc. is governed please consult the ACO Governance Handbook.

2. What is an ACO Branch?

- the representative of The Architectural Conservancy of Ontario Inc. at the local level

- not a separate legal entity

- responsible for upholding the reputation and image of the organization

- its actions can support or threaten the existence of ACO as a whole

Effective branches grow the organization, attract new members and give them opportunities to devise new ways to advance ACO's educational and advocacy work.

2.1 What are the responsibilities of a branch?

- Adhere to ACO's objectives.

- Have at least three current (i.e. fully paid-up) ACO members.

- Comply with ACO's Bylaw, policies and the legal statutes under which ACO operates.

- Open local bank accounts under the umbrella of ACO Inc.'s banking relationship with the Bank of Montreal. ACO Inc. COO and Chair must have signing authority on all branch bank accounts.

- Keep financial records that are compatible and can be consolidated with those of other branches. Currently this means entering all financial transactions into QuickBooks accounting software.

- Send a backup copy of the branch's QuickBooks records to the bookkeeper at ACO's central office at the end of each quarter (March, June, September, December).

- Accompany the QuickBooks records with copies (paper or preferably digital) of ALL financial documents (cheques written and received, bills paid, bank deposits made, etc.) for the quarter. Explanatory records for each and every financial transaction must be available at ACO's central office for the Auditor (both ACO's external auditing firm and the Canada Revenue Agency).

- Complete financial records for the previous year must arrive at ACO's central office no later than February 8 of the following year.

- Have regular members' meetings. Send copies of meeting minutes to ACO's central office.

- Have an election of officers once a year.

- Choose a member to be the branch's voting representative on the provincial Board of Directors, normally for a one-year term. If the representative changes, ACO's central office must be informed at once, no later than 30 days in advance of a Board meeting. Board members are legally liable and need to be registered with the government and on ACO's insurance policy as soon as possible.

- Ensure that the branch representative attends all Board meetings and reports back to branch members.

- Ensure ACO's central office has up to date information about all branch officials.

- Send ACO's central office monthly reports of all membership activity (new members, renewals, changes in members' contact information).

- Where the branch has significant funds for investment, comply with the Trustees' Act, ACO's Investment Policy and establish a contractual relationship with ACO's Investment Advisor.

- All ACO Board Members and Branch Executive Members are required to certify that they have read and understand ACO's Bylaw, Conflict-of-Interest Policy, Communications Policy, ACO Principal Values and Code-of-Conduct Policy and the ACO Governance Handbook, before assuming office.

2.2 Are there alternatives to branch status?

- An **Associate Branch** (proposed category) is a group of Members committed to the objects of the organization, who do not want to set up and maintain the administrative requirements of a qualified ACO Branch. An Associate Branch may be a group of concerned Members focused on saving a particular heritage building or cultural landscape in their community at a given time. Associate Branches do not have a representative on the Board of ACO and they do not have financial and administrative reporting requirements.

- Groups may seek a short-term affiliation with ACO for advice and fundraising support for a particular project. If the goals of such a group are consistent with ACO's objects of incorporation, then the group could ask to become an **Agent** of Architectural Conservancy Ontario. An agency agreement would enable qualified groups to share ACO's charitable status for a limited period of time. To accommodate legal and administrative costs, ACO normally charges a small percentage fee of all funds raised.

2.3 What are the benefits of becoming an ACO branch?

- Instant establishment in a recognized province-wide organization[1]

- Access to the experience of others in the heritage and related fields, with mentoring from other ACO branches

- Exposure to emerging province-wide and national trends in heritage preservation and heritage advocacy

- Ability to provide an additional, independent, perspective on heritage issues to complement that of advisory government-appointed Municipal Heritage Committees

- Ability to arrange for tax receipts for qualified donations

- Access to an electronic version of the ACO letterhead, customized for the branch

- Availability of group rate liability insurance for all ACO events and meetings involving board members and volunteers

2.4 How do we establish a branch?

Step 1: Become a member of ACO.

Step 2: Find at least two other people, preferably five or more, to become ACO members. Review this Handbook, especially Section 2.3 Responsibilities of a Branch, ACO's By-law, Principal Values and Code of Conduct, Conflict of Interest Policy and Communications Policy.

Step 3: Contact ACO Inc.'s Chair or Chief Operating Officer with a request to establish a branch. Complete the **Application Form** (Appendix B). The request will be reviewed and if accepted, it will be moved by the ACO Board and approval will be communicated to your designated contact.

Step 4: Arrange a meeting of prospective branch members (who are current ACO members) to elect

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[1] ACO has earned its reputation as a voice to be reckoned with. In 2019 ACO and its branches organized or participated in 400 events with a total attendance of over 53,000 people. In addition, board members and volunteers participated in local workshops and planning meetings, researched local heritage issues, and acted as advocates for heritage before various levels of government, investing well over 36,000 volunteer hours. (Needs citation)

officers, including the branch's representative on the ACO Board of Directors.

Step 5: The designated branch representative will be welcomed to the ACO Inc. Board at its next meeting and should be familiar with the aforementioned documents and the ACO Governance Handbook and be prepared to sign ACO's Director Consent and Compliance Form.

Step 6: The establishment of branches shall be confirmed at the next annual general meeting of the Conservancy.

2.5 How are branches organized?

The organization of a branch is largely up to the branch. At a minimum, branches need

- someone to lead decision making
- someone to record decisions taken, especially financial decisions
- someone to keep good financial records of any moneys received or spent locally keep someone to receive and record memberships
- someone to make sure ACO's central office gets these records in a timely fashion
- someone to represent the branch on the ACO Inc. Board of Directors and attend Board meetings

These *could* all be fulfilled by one person, but that person might burn out or become ill and leave the branch without administration. It's thus advisable to share administrative tasks and to have a trainee or understudy as a contingency for each and every essential role.

It's up to your branch to decide exactly how to define these roles. See **Appendix C** for one example.

Other possible roles include the following:

Communications: A member to send regular updates to members (these could be links to local news stories, updates on local heritage issues, information about heritage-related events whether organized by ACO or other organizations, news about branch members) as little or as much as you can manage. The point is to keep ACO alive in member's minds, keep them feeling connected. Communications can take many forms: emails, newsletter, Twitter tweets, Facebook, SnapChat, Instagram posts, as many or as few as you can manage. But keep in mind your members' communication preferences.

Publicity: A member to keep your branch visible to future members and decision-makers. At a bare minimum, promote branch events and branch positions on heritage issues. Beyond this, look for opportunities to bring ACO and heritage into discussions developing on social media.

ACO London's Communications Guide, available as **Appendix D,** is full of communication and publicity ideas and tips that can be adapted to fit your branch's human resources.

Education Coordinator: A member to develop educational materials and opportunities for members and the general public. These could be lectures, bus tours, webinars, written materials, courses, games or contests. See Program Ideas in Section 5.1, below.

Event Coordinator: A member to organize public events for members and/or the general public. These could be educational, fundraising, or social events where members get to know each other and start to develop the trust relationships necessary for effective collaboration.

Fundraising Coordinator: A member who coordinates and/or oversees fundraising events or appeals for branch projects and activities, while liaising with ACO Inc.'s Development Officer to maximize each other's efforts and avoid competition. See Fundraising Ideas, Program Ideas in Section 5.1.

Advocacy Coordinator: A member who finds ways to engage branch members and the general public in actions that will influence decision makers to develop rules and policies and make positive decisions that favour heritage conservation.

Community Liaison: A member who monitors a key community organization, e.g. Municipal Heritage Committee, Doors Open Committee, Tourism Board, and keeps the branch informed about important upcoming issues especially ones where ACO input could make a critical difference. Some branches covering multiple municipalities assign a different person to each municipality.

2.6 Can I be a Member of Both an ACO Branch and a Municipal Heritage Committee?

Sometimes ACO Branch executive members have simultaneously been members of a Municipal Heritage Committee and ACO. Our policies do not preclude this dual involvement. However, carefully consider whether you would have a conflict of interest or a perceived conflict of interest. ACO's Conflict of Interest Policy can provide guidance (insert link). Some ACO members have found this role difficult because it may call on them to support committee decisions which, in their opinion, fall far short of what is needed for heritage conservation. Monitoring MHC agendas or having regular conversations with committee members or staff about upcoming issues could be an alternative and potentially more effective strategy.

2.7 Do branches need to have their own by-laws?

No. You are required as members of ACO to comply with ACO's By-law (updated 2018). If it is useful for your branch efficiency and effectiveness, you may wish to draft some organizational guidelines.

2.8 How and why are branches sometimes closed?

ACO's Board of Directors may approve a resolution to wind-down or terminate the status of an established qualified branch under the following conditions:

- Branch members decide they no longer wish or are no longer able to fulfill the requirements of a qualified ACO branch;

- The number of branch members in good standing (paid-up) declines below three (3) individuals;

- Branch members fail to comply with the Corporation's Conflict of Interest Policy, Principal Values and Code-of-Conduct and other policies identified in the Governance Handbook.

- A branch fails, in the assessment of the Corporation's Board to demonstrate a reasonable standard of financial accountability and stewardship of the Corporation's assets.

3. How does ACO Build Support for Heritage Conservation?

ACO, its branches and membership build support with local events and by example. The former CEO of English Heritage, Dr. Simon Thurley summarized the process very well in that organization's 2005-2010 strategic Plan, *Making the Past part of Our Future* https://historicengland.org.uk/images-books/publications/eh-strategy-2005-2010/making-past-part-of-our-future/ . We have applied his principles below to the activities and goals of ACO and its members.

He identified four stages to the Cycle of Engagement illustrated below:

Cycle of Engagement
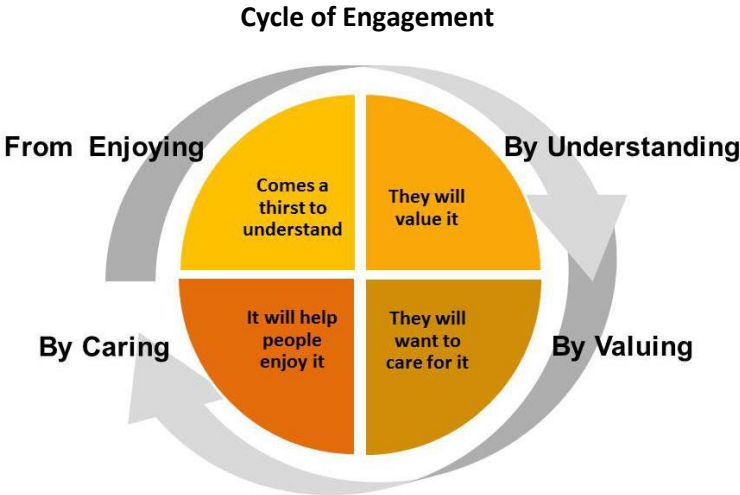
Each part of the cycle has specific strategic aims:

1. **Understanding:** Help people develop their understanding of their heritage.

2. **Valuing:** Get heritage on other people's agenda; and enable and promote active management and sustainable change to Ontario's heritage.

3. **Caring:** Help local communities to care for their heritage.

4. **Enjoying:** Stimulate and harness enthusiasm for Ontario's heritage

3.1 How do ACO branches deepen understanding of heritage?

Knowledge is the starting point.

- Branch newsletter articles, Facebook posts, Tweets, Instagram photos of heritage buildings, natural landscapes and particular architectural styles are great ways to increase public awareness and understanding.

- **ACORN** magazine articles, provide deeper understanding of particular aspects of our heritage.

- **Historical Plaque Program**: Upon request and payment of a $125 fee, ACO Stratford-Perth County volunteers research the history of properties built before World War II. A plaque recording the date of construction and the name and occupation of the first resident is created and then presented to the homeowner to be placed in a clearly visible place on the front facade of the building. The plaque program does not involve heritage designation under the Ontario Heritage Act, but it has greatly increased awareness and interest in Stratford-Perth County heritage since the branch started it in 2012. For more information contact yakster@rogers.com.

- ACO Toronto is building an inventory of all historic buildings and structures in Toronto on its **TOBuilt** website. Its compendium of research sources could be useful for other ACO branches, available at https://acotoronto.ca/tobuilt_new_detailed.php?s=3 .

- **Doors Open** can be a great way to showcase heritage buildings. Several ACO branches including Clarington and Windsor have coordinated Doors Open for their communities. Bernice Norton said ACO Clarington has been running Doors Open for 11 years, trying to get 10-15 sites each year and doing history research and displays for most of their sites. One of the biggest challenges is to get people to commit to opening their doors before the deadline set by Ontario Heritage Trust (Doors Open coordinator for the province). Getting the 50-100 volunteers they need each year is another big challenge. "No sugar coating, Doors Open can be stressful," Bernice said. It's hundreds of hours of planning, finding, visiting sites, communicating, history research, site coordination, site set up, publications and promotion. But "for us it is worth the effort," she said. "Tourism gets 5,000 to 10,000 visitors. The joy of friendships, history research and learning. The stories we hear from our visitors, and the pride of accomplishment seem to make it worthwhile." For more information contact bernice_norton@hotmail.com or doclarington@gmail.com .

- Lectures about architectural styles, specific architects, heritage landscape architecture etc. have attracted many new members to ACO North Waterloo Region. Contact aconwrb@gmail.com for many excellent ideas.

- **House Tours, Bus Tours, Walking Tours**, even **Boat Tours** are great ways to teach people about our heritage as many branches, e.g. Cambridge, Cobourg, Port Hope have learned. For 45 years ACO London held Geranium Heritage House Tours (so called because red geraniums identify each house on the tour) in different historic neighbourhoods of London on the first Sunday afternoon in June, attracting sellout attendance of 500 visitors. "The tours have encouraged people to appreciate London's architectural heritage, provide publicity for the branch, as well as being a flagship fundraiser," the branch said. For more information contact info@acolondon.ca or Richard Longley longley_fovea@sympatico.ca who has compiled and led many Toronto walking tours.

- **Heritage Scavenger Hunt**: Prepare a list of architectural features (defined and explained) to find, or questions to answer (e.g. information from date stone) on a heritage main street or in a heritage conservation district. Prizes, e.g. "heritage is green" candies to all who correctly answer half the questions. Great family activity, easily adaptable to any audience. Participants routinely say "I never noticed those buildings before." For more information contact aconwrb@gmail.com .

- **Heritage photo competitions**, sometimes sponsored by ACO branches, sometimes sponsored by heritage companies or professionals, spur people to become more informed and aware of their surroundings. In 2012 MasonryWorx asked ACO North Waterloo Region to nominate the top masonry heritage buildings in Waterloo Region. ACO-NWR in turn asked its members, and got the local newspaper to publish a weekend photo spread of the winners.

3.2 How do ACO branches encourage others to value heritage?

ACO branches working in their own communities and collectively at the provincial level do much to get heritage conservation on other people's agendas, and to encourage better legislation, policies, guidance and good practice to improve the system of heritage conservation.

- Members of many ACO branches have appeared as delegations at local and regional council meetings and municipal heritage committee meetings to applaud decision makers for positive steps, e.g. adding properties to the Heritage Register or refusing the requested demolition of a listed heritage building, or to increase Councillors' and Committee Members' knowledge about specific properties or heritage conservation practices in general.

- Some branches e.g. ACO Port Hope have **Advocacy Committees** which monitor community developments and intervene formally and informally with municipal staff and elected officials.

- Several branches, e.g. Clarington, Windsor, have executive members who each liaise with or monitor significant organizations and decision makers in their communities, such as the Municipal Heritage Committee, Regional Heritage Advisory Committee, Doors Open.

- ACO Chatham-Kent and ACO North Waterloo Region put heritage on realtors' agendas by organizing and helping deliver a **heritage real estate course**. Contact Marlee Robinson marleerobinson@gmail.com or Susan Ratcliffe susarat@gmail.com for more information.

- ACO Toronto organizes an **annual symposium** on a critical heritage issue, e.g. Disappearing Main Streets, School Buildings at Risk, with a wide range of speakers and viewpoints including several municipal decision makers. Making attendance eligible for Ontario Association of Architects Continuing Education credits helps make architects more aware of heritage conservation issues.

- A **Design Charrette** is a rapid and intense creative brainstorming session to reconceive a purpose for a building or landmark. ACO NextGen has held design charrettes for 8 years. ACO Windsor organized its first in 2020 (but it had to be cancelled due to COVID-19 outbreak). Because they

attract a wide variety of participants and because they stimulate new ways of thinking about often underappreciated heritage properties, design charrettes can both get new people thinking about heritage issues *and* stimulate better heritage practices. ACO Windsor President Tammy Dewhirst found the Ontario Association of Architects' planning guide particularly helpful. Outreach to local art and architecture instructors at institutions of higher learning helped attract the student participants ACO Windsor wanted to mix in with local professional groups and heritage groups. Contact tammydewhirst@gmail.com or ACO NextGen Committee chair Jocelyn Kent jocelyn.kent@gmail.com for more information.

- Ideally all ACO branches send delegates to meet with MPPs on ACO's **Heritage Day at Queen's Park**. Using research compiled by ACO's Policy Committee, ACO members help decision makers become aware of the economic, job creation, environmental, mental and physical wellbeing benefits of heritage conservation.

- Jane's Walks are a low key, relaxed, but very effective way to get new people thinking about heritage as well as engaging in discussion on ways to better protect it. Inspired by urbanist Jane Jacobs and held on the weekend in May closest to her May 4 birthday, Jane's Walks are walking conversations. Instead of following a tightly timed and researched script, walk leaders plan a route and a few discussion starting presentations along it. For more information contact kaeelgie@yahoo.com, former Jane's Walks Coordinator for Waterloo Region.

3.3 How do ACO branches help communities care for their heritage?

- To help heritage property owners learn how to properly care and repair their buildings, ACO North Waterloo Region worked with Region of Waterloo Cultural Planners to develop a series of **Practical Conservation Guides** on masonry, foundations, windows and 14 other topics. https://www.regionofwaterloo.ca/en/exploring-the-region/Heritage-conservation-toolbox.aspx To help property owners find knowledgeable consultants and tradespeople ACO NWR also maintains a **Directory of Heritage Practitioners** https://aconwr.ca/dohp.php .

- Many branches, e.g. ACO Collingwood, have lobbied and worked with municipal staff and decision makers to get systems of heritage restoration grants and/or heritage property tax relief established in their communities.

- **Ontario Heritage Conference:** ACO co-hosts with Community Heritage Ontario and Ontario Association of Heritage Professionals an annual conference on issues of province-wide interest, such as environmental sustainability, upcoming legislative changes, adaptive reuse of heritage.

- Several branches, e.g. ACO Guelph, ACO North Waterloo Region, have organized "**Caring For Your Heritage Home**" lectures by knowledgeable heritage professionals, sometimes targetted to specific heritage neighbourhoods or conservation districts.

- **ACO PreservationWorks!** As documented in *80 for 80*, several branches have called upon ACO's PreservationWorks! program to bring in professionals who volunteer their time to provide advice on heritage properties at risk in their communities.

- Several ACO branches have contributed funds toward the restoration or maintenance of designated heritage properties owned by municipalities or charitable not-for-profit corporations in their communities.

- **ACO's Interventions to Protect** is an annual listing of ACO branches' actions to help communities care for their heritage, compiled by former ACO President Richard Longley. Available at https://acontario.ca/show_res.php?r_id=22 it is a treasure trove of tactics!

- In several communities ACO has purchased properties at risk which local branches carefully maintain as examples of heritage conservation at work, e.g. ACO South Bruce Grey: Victoria Jubilee Hall, ACO Cambridge: Blair Sheave Tower, ACO Port Hope: the "Little Station."

3.4 How do ACO branches stimulate and harness enthusiasm for local heritage?

- **ACO 's Heritage Awards:** ACO celebrates the heroes, the projects and the heritage conservation initiatives of the province with the presentation of 12 awards at a gala reception in Toronto each fall.

- ACO London teams up with the Heritage London Foundation to annually present **London Heritage Awards** that recognize outstanding leadership excellence in heritage conservation across the London region.

- Even if they happen less frequently, local heritage awards, such as the ones organized by ACO St. Thomas-Elgin and other branches, are an important way to gather enthusiasts together and celebrate accomplishments.

- Several ACO branches have discovered that many journalists have a secret passion for heritage, and love to write about, and thus help promote, events which provide the back story of local heritage treasures. Brief notes, tweets, media releases to journalists and other community leaders and influencers help build public enthusiasm.

- Some ACO branches regularly post or share stories on the pages of local Facebook "nostalgia" and history groups and are often amazed at the copious, passionate response.

- Particularly effective ACO branches keep in regular, informal contact with local politicians and like-minded community groups. The friendly contact leads to respect for ACO's heritage conservation work.

4. How Do We Build and Maintain a Strong and Vibrant Branch?

Ideas in this section have come from many people. This needs to be an ever-growing section of the handbook. Send your ideas to president@acontario.ca and will@acontario.ca so they can be added.

4.1 Do we need to increase our membership?

No matter how well your branch executive works and gets along today, the day will come when someone wants or needs a break. The more members you have, the more likely you are to find new people to keep the branch going.

More memberships mean more revenue for your branch. Part of every membership fee goes to support the services which benefit all ACO branches:

- the central coordinating office,
- the staff who answer your questions,
- all the work that goes into safeguarding ACO's charitable status, without which branch fundraising efforts would be much, much harder,
- ACO's liability insurance coverage for events organized by ACO branches or members,
- ACORN magazine,
- ACORN in a Nutshell, programs like PreservationWorks! and the Awards program, advocacy efforts to get provincial policies which will better protect heritage everywhere,
- the ACO website,

More members mean more supporters for your local advocacy actions, more people to talk to local decision-makers, more people to write letters to the editor. Numbers talk. New voices get fresh attention.

4.2 How can we expand our membership?

Below are some ideas that have worked for other branches.

- Place rack cards promoting benefits of ACO membership with local realtors, especially ones known to be good at selling heritage properties. Consider giving, or having the realtor give, a one-year ACO membership as a housewarming present to new heritage home owners. For more information contact ACO Cobourg & East Northumberland dianemchin@gmail.com .

- Instead of making all your events free of charge, consider making them free for ACO members only. ACO North Waterloo Region doubled its membership when it produced a high quality lecture series on the work of Waterloo Region Mid Century Modern architects, for which the general public paid $9 a lecture, ACO members were free. For more information contact aco.nwrb@gmail.com .

- Create special benefits which are only available to members, for example

  o London, Port Hope and North Waterloo Region produce newsletters with well researched articles on heritage properties, local architects, architectural styles, along with accounts of events, tips for heritage property owners, etc. Contact info@acolondon.ca, advocacy@acoporthope.ca or aco.nwrb@gmail.com for more information.

  o ACO North Waterloo Region scans notices of broadly defined heritage events and news from museums, historical society, postcard club, architecture school, etc. and prepares a curated

email list of Events of Interest. If limited to members only this convenient high quality service can be an incentive for people to join.

Ideas for expanding the membership base into new demographics

- Initiate a jointly planned event with a group representing a target demographic. Example: In 2018 Ontario Archaeological Society teamed up with the Ontario Black History Society to organize a conference connecting Black history, heritage and archaeology. Sessions combined professional, mostly White, archaeologists with mostly Black amateur and academic historians. Conference attendance was much bigger and much more varied than usual. See conference program for more information.
  https://www.ontarioarchaeology.org/resources/Documents/2018%20OAS%20Final%20Programme.pdf

- Exchange memberships with a group representing a target demographic, and find ways to participate in each other's events.

- Develop relationship with nearby universities and colleges, and heritage-relevant programs to attract NextGen members

- Create a one-page fact sheet about your branch to recruit and orient new members

- Place volunteer recruitment ads online

- Promote online opportunities to become ACO members and to donate to ACO

- For NextGen members, short-term assignments are recommended, e.g. social events, walking tours, social media help

- Expect and plan to modify your traditional ACO approach as you work with a new group.

- Be open for volunteers to approach advocacy and educational programs in new ways

- Motivate yourself to respect different ways of thinking, and different ways of doing things

Below, ACO NextGen Committee Chair Jocelyn Kent jocelyn.kent@gmail.com strongly encourages branches to recruit young adult members.

"To ensure long-term vitality and relevance within the community, branches need to actively attract new members and volunteers to the cause. Specifically, branches need to improve at reaching one broad "type" of people: young adults.

Adults under 40 are now the largest living generation, representing over a quarter of Canada's total population. Their values will and already are having a profound effect. Luckily for us, the "millennial" generation (aged 25-40 in 2020) connect with heritage! According to a survey of millennials conducted by the United States' National Trust for Historic Preservation, nearly all (97%) feel it's important to preserve and conserve buildings, architecture, neighbourhoods, and communities. Also, in comparison

to the average person, millennials are also more likely to get involved in non-profit organizations, volunteering their time and donating their money online. Most connect with the cause, but most are not yet actively involved in historic preservation. There is real opportunity to increase engagement with this generation. So seek them out!

Today's **youth entering adulthood** are members of the most diverse generation Canada has ever seen. By reaching out to young adults, in turn, branches will engage more ethnically diverse audiences and become better at representing their communities. Their unique talents and insights enrich branches.

Post-secondary students and emerging professionals (i.e. NextGen members) have much to offer branches, and branches have much to offer them. It can be a very productive and mutually beneficial partnership. Volunteering offers the next generation invaluable opportunities to explore their interests, build marketable skills, and connect to a network of industry professionals.

Their participation is often sporadic and more suited to short-term commitments. Long-term projects or those that rest on specialist knowledge, such as municipal procedures, are less likely to inspire young volunteers. Public engagement projects such as outreach or programming, which offer immediate results, are more effective. NextGen volunteers are most motivated when offered the chance to interact with other young people. Providing support for volunteers to pursue their own projects can give them the responsibility and self-direction they seek, while benefitting the branch.

NextGen branch members are encouraged to participate in programs created by ACO's NextGen committee: a great way to learn new skills, meet new people and broaden their professional network!"

4.3 How can we retain our members?

- Have at least one event a year, educational or social, so members can see the branch in action and can see some reason for continuing to belong.

- Make new members feel welcome. Send them a welcoming note, email or phone call.

- Create social opportunities where new members can meet others. Consider name tags, mixer activities, or having a couple of greeters to help introverts feel comfortable.

- Ask people to help out with specific tasks, tailored to their interests or abilities, which you have learned about because you have talked with them and gotten to know them. People may be shy or not confident about answering a general call for help.

- Easy jobs, like making coffee for a meeting or helping staff a display at an event, are a good way for new members to get to know other members.

- Asking people to help is a compliment. It shows you have confidence in them and trust them.

- Ask people for help. Don't do it all yourself. Your branch will die if you don't involve other people.

- Thank them. Thank them for considering your request for help. Thank them for supporting the branch through their membership. Thank them for their comments and feedback. Thank them for coming to events.

- Listen to their suggestions. Try very hard to implement them or incorporate them. Nothing is more discouraging than to have one's suggestion **immediately** shot down by being told, "It won't work," or "We tried that once and we didn't like it."

- Consider very carefully which is more important: having total control over what you consider to be a perfect but ever shrinking branch, **or** taking a chance on a new person or a new idea which may end up revitalizing your branch.

- Annual renewal campaign. When the ACO membership term was the January to December calendar year, many branches got great membership retention success by sending out a renewal reminder email or letter in February-March.

- Now that membership is continuous intake, and renewal notices are automatically emailed by ACO's membership software, an annual renewal campaign could be directed only at people whose membership has already lapsed. This service can be personalized to include information about the local branch or tell them about member benefits they will miss if they don't renew (e.g. the next issue of ACORN has a great article about...). New members could be recruited to help develop a script and coached to personally telephone lapsed members. These calls are a great opportunity to ask people what they value or don't value about ACO membership, and share this information with ACO's central office as well as your branch executive.

4.3 Do we need to have a branch Annual General Meeting?

Whereas ACO Inc. is required by the Ontario Not-for-profit Act and the Ontario Corporations Act to have an annual general meeting of members to approve financial statements and approve appointment of the auditor, an ACO branch does not *have* to meet annually for these purposes.

However, an ACO branch does need to have a meeting of members to elect officers of the branch and appoint a representative of the branch to serve on the ACO Board of Directors. From an organizational perspective, it is highly desirable for the ACO branch to meet for the purposes of not only electing officers, but also to **celebrate their achievements** and get to know each other.

Branches are free to determine their own operating guidelines, but the following practices have been proven to work well:

- If board elections are planned, give members at least 10 days notice of the date, time and place of the meeting.

- Establish how many paid members of your branch need to be present (quorum) for the meeting to be considered official. The Ontario Ministry of the Attorney General's guidance suggests a majority

of eligible members unless otherwise specified.

- Suggested agenda items:

  - o Welcome and Land Acknowledgment
  - o Declaration of Conflicts of Interest
  - o Approval of agenda
  - o Receipt of the minutes of the previous meeting
  - o Reports of the Officers of the branch
  - o Reports of committees
  - o Receipt of the branch financial statements
  - o Election of Branch Officers and ACO Board Representative
  - o Any special business as may be required or set out in the notice of meeting
  - o Guest speaker on a topic of special interest to the broad (non-executive) membership of the branch, and
  - o Informal socializing, refreshments

4.4 How can we be effective as a branch?

Some branches find it helpful to have an annual planning or goal setting session.

"Annually ACO Cobourg & East Northumberland participate in a goal setting exercise to develop priorities for the year," said ACO Cobourg President Diane Chin. "We have a template that we work through based on the ACO Mission [stated in Section 1.1 of this document] and additional items that flesh the Mission out."   The template is attached as Appendix E.

It is useful to review the ACO Provincial Board's strategic plan, as a starting point to planning annual branch priorities. The Strategic Plan 2018-2022 can be found on the ACO website, as a Members Resource (ACO Documents).

Are there specific Board objectives your branch could help meet? Please talk to the Board Chair and COO about this.

4.5 How do I chair a meeting of our branch?

Many of our accomplishments at ACO are led and facilitated by committees or the Board of Directors. *Getting stuff done through people* is key to our organization accomplishing its objectives. If you are leading a meeting, here are some things to consider:

Respect the Position
Remember Why You Meet - **Meetings are intended to solve problems and make decisions**. A Chair's

role is to be a leader that facilitates change – to move the organization forward from where it is currently to the next place in its journey. The Chair should be able to lead the meeting in such a way as to solve problems and facilitate decisions. Ideally the outcome is board consensus not division and conflict.

Be a Leader - The Chair should be a leader in

- character – always acting with integrity;
- competence – being informed and aware of what is needed to do the job;
- courage – not being afraid to make the tough decisions and confront difficult issues head on;
- calling – don't select someone as Chair unless you think that the chosen individual can uniquely serve the organization, that they are the best person for the job at this point in time.

Being a leader with integrity also means facilitating chair succession, grooming and encouraging potential successors, making sure that someone is ready, willing and able to step into your shoes seamlessly.

Respect the Process

Create the Agenda: The Chair keeps the group focused on the agenda items.

Help Committee/ Board Members Prepare by distributing briefing materials well in advance of the meeting.

Stay Aligned: Align the agenda with the work plans of the committee/board; craft the agenda in consultation with staff and colleagues and ensure it aligns with the organization's strategic plan.

Respect Time: Start promptly, keep to a timed agenda, and endeavour to end on time while fulfilling the meeting's objectives.

Call for a Vote: Financial actions such as approving payment of expenses should have a mover and a seconder and should be voted on. Other decisions, such as whether the board will make a public statement of its position on a local heritage issue, could be decided by consensus, or could be voted on. Knowing when and when not to call for the vote is a skill. It requires reading the board and allowing people enough time to process the information provided and then achieve group agreement on a plan of action. Difficult decisions can take more than one meeting. On the other hand, needlessly delaying a decision can frustrate members.

Respect the People

Understand People: Chairs should understand how to work with people of different opinions, personality, problem solving and learning styles/types.

Listen to People: Good chairs know how to listen. When individual members are not adding to the deliberation, a good Chair will draw out their opinions.

Communicate with People: Clarity of expectations and rules of order are integral to effective meetings. It is the job of the Chair to set the expectation.

Keep Your Commitments to People: Chairs should never make a promise they cannot keep and they should not be afraid to admit it when they don't have the answer. If the Chair breaks a commitment

people lose trust not only in the Chair, but also in the organization.

Respect Diverse Opinions

The value of diversity on boards is that the expression of a variety of views, based on different experiences and skills, usually result in more effective decisions for the organization.

4.6 Are there any behaviours or actions branch members should avoid?

Architectural Conservancy of Ontario is a registered charity with the Charities Directorate of the Canada Revenue Agency, and a not-for-profit corporation (Ontario). The Canada Revenue Agency publishes a toolbox for directors, officers and volunteers to help them understand the requirements and obligations of maintaining charitable status https://www.canada.ca/en/revenue-agency/services/charities-giving/charities/operating-a-registered-charity/toolbox-directors-officers-volunteers.html.https://www.canada.ca/en/revenue-agency/services/charities-giving/charities/operating-a-registered-charity/toolbox-directors-officers-volunteers.html.

ACO's Principal Values and Code of Conduct and its Conflict of Interest and Respect in the Workplace Polices outline the actions that all Staff, Board members and Branch executives must avoid. The following applies those principals specifically to the members of ACO branches.

Branch members:

- shall not hold financial interests that conflict with The Architectural Conservancy of Ontario Policies or Procedures;
- shall not engage in financial transactions using nonpublic information or allow the improper use of such information to further any private interest;
- shall make no unauthorized commitments or promises of any kind purporting to bind the ACO;
- shall act impartially and not give preferential treatment to any private organization or individual;
- shall protect and conserve ACO property and shall not use it for other than authorized activities;
- shall adhere to all laws and regulations that provide equal opportunity for all, regardless of race, colour, religion, sex, national origin, age, or handicap;
- shall endeavour to avoid any actions creating the appearance that they are violating the law or the ethical standards promulgated pursuant to this order.
- Members must act in the best interest of the community, and not based on societal pressures or monetary incentive.

4.7 Can branches purchase assets?

Capital Assets (buildings, computer equipment, machinery, vehicles, etc.) cannot be owned by branches as the branches have no legal existence under the law. Rather, they are owned collectively by the

branches through the provincial corporation, ACO Inc. Although these assets may be managed by an individual branch, they are not owned by the branch. Therefore, to buy, sell, lease a capital asset requires a motion passed at an ACO Inc. Board of Directors meeting. If you have any questions, please contact ACO's COO Will@acontario.ca

4.8 What ACO branch Activities are forbidden by legislation?

Some activities might sound like a good way to raise funds or encourage heritage conservation, but as a not-for-profit charitable organization ACO may not be permitted to engage in some activities especially if they are not specifically listed in ACO's objects.

Currently, Canada Revenue Agency (CRA) has ruled ACO is not permitted to award
- Scholarships
- Heritage restoration grants to individual property owners (properties owned by charities or municipalities are permitted, however.)

ACO Inc. will investigate, with CRA, if there are other ways for ACO to provide these valuable programs. But in the meantime, branches should stop awarding scholarships and heritage restoration grants. Questions? Please contact ACO Chief Operating Officer Will Coukell will@acontario.ca

4.9 How do branches access ACO group liability insurance?

Many potential venues for ACO branch events require purchase or proof of liability insurance coverage. Contact Tai So, tai@acontario.ca with details of the event and proposed venue and she will work with our broker to provide a certificate covering ACO members, volunteers and event attendees.

4.10 How do we maintain our branch's page on the ACO website?

A Guide to Editing ACO's Website (www.acontario.ca) is outlined in the *ACO How-to Guide: Editing ACO's Website for Branches.*

If you just need to update your own personal info you can do that by logging in at www.acontario.ca then click members → login.

4.11 How do we process local branch memberships?

ACO has developed a step-by-step guide for processing local branch memberships titled: *ACO How-to Guide: Processing Local Branch Memberships.*

5.How do Branches Generate Funds?

A portion of each branch membership fee is allocated to branches for their use covering routine expenses such as printing, event venue rentals, advertising and promotion, speaker honoraria, annual general meeting refreshments.

In addition, most ACO branches have raised funds for specific local projects, such as publications, conservation or restoration of qualified heritage properties, or subsidizing one of their members to be a first-time attendee at the Ontario Heritage Conference.

5.1 How have ACO branches raised funds?

- Some branches, e.g. ACO Cambridge, do an annual fundraising appeal to their members and supporters. If made at the same time as ACO Inc.'s Development Manager is making her appeal, this can be confusing or even irritating for potential donors. Branches contemplating a member appeal are strongly urged to discuss their plans with ACO's Development Manager Devorah Miller devorah@acontario.ca

- House Tours have been an important source of funds for many ACO branches, e.g. Cobourg, Port Hope, London, Cambridge.

- Some branches, e.g. ACO Windsor, ACO Clarington, cover the expenses they incur coordinating events like Doors Open for their communities by negotiating a fee for service agreement with a local organization, e.g. municipality, arts council.

- ACO Port Hope organizes an annual Antiques and Artifact Auction with donations from local dealers and collectors (who receive a charitable tax receipt for the externally appraised value of their contribution). For more information contact brucebowden@sympatico.ca

- ACO Stratford-Perth County covers the research and production costs of its Heritage Plaque Program by charging property owners $125 per sign. Thanks to hundreds of hours volunteer research time, the fees generate surplus cash for other branch expenses.

- Many branches, e.g. ACO Toronto, ACO North Waterloo Region, have realized that selling advance tickets for educational events helps avoid embarrassing half-empty halls. As well, the general public seems to value experiences they have paid for more than free ones.

- ACO Port Hope organized a Stage-A-Party drive to entice a number of different hosts to each invite their circle of friends to a fundraising reception at their respective homes. The goal was to generate the annual rent and operating funds needed by the branch.

- ACO Cobourg, ACO North Waterloo Region and other branches have worked with local artists to produce posters and note cards depicting local heritage landmarks to sell as fundraisers.

5.2 Are there guidelines for writing grants for branches?

As the only legal entity representing all ACO branches, all grant applications must be made and approved by ACO Inc. Board of Directors and signed by authorized ACO Inc. representatives.

Many grant programs, especially province-wide or ones from larger organizations, do not allow multiple applications from a single organization. In the past, some ACO branches applied on their own behalf, with the result that all other parts of the organization are barred from accessing that source of funds for a very long period of time.

The term "grant" can be confusing. Sometimes local service agreements, e.g. to coordinate Doors Open, are commonly called grants. So rather than jeopardizing all other ACO branches, please discuss your "grant" intentions with ACO's Chief Operating Officer Will Coukell before you start to apply.

Appendix A: Governing Legislation for ACO Activities

Anti-terrorism Act (Canada) https://laws-lois.justice.gc.ca/eng/acts/a-11.7/index.html

Canada Business Corporations Act https://laws-lois.justice.gc.ca/eng/acts/c-44/

Canada Not-for-Profit Corporations Act https://laws.justice.gc.ca/eng/acts/c-7.75/

Canada Pension Plan Act https://laws-lois.justice.gc.ca/eng/acts/c-8/index.html

Corporations Act (Ontario) https://www.ontario.ca/laws/statute/90c38

Charitable Gifts Act (Ontario) https://www.ontario.ca/laws/statute/90c08

Charities Accounting Act (Ontario) https://www.ontario.ca/laws/statute/90c10

Competition Act (Canada) https://laws.justice.gc.ca/eng/acts/C-34/index.html

Customs Act (Canada) https://laws-lois.justice.gc.ca/eng/acts/c-52.6/

Employer Health Tax Act (Ontario) https://www.ontario.ca/laws/statute/90e11

Environmental Protection Act (Ontario) https://www.ontario.ca/laws/statute/90e19

Excise Tax Act (Canada) https://laws-lois.justice.gc.ca/eng/acts/e-15/

Employment Insurance Act (Canada) https://laws-lois.justice.gc.ca/eng/acts/e-5.6/

Freedom of Information and Protection of Privacy Act https://www.ontario.ca/laws/statute/90f31

Health Insurance Act (Ontario) https://www.ontario.ca/laws/statute/90h06

Human Rights Code (Ontario) https://www.ontario.ca/laws/statute/90h19

Income Tax Act (Canada) https://laws-lois.justice.gc.ca/eng/acts/i-3.3/

Income Tax Act (Ontario) https://www.ontario.ca/laws/statute/90i02

Insurance Act (Ontario) https://www.ontario.ca/laws/statute/90t23

Loan and Trust Corporations Act (Ontario) https://www.ontario.ca/laws/statute/90l25

Municipal Freedom of Information and Protection of Privacy Act (Ontario)
https://www.ontario.ca/laws/statute/90m56

Not-for-Profit Corporations Act (Ontario) https://www.ontario.ca/laws/statute/10n15

Occupational Health and Safety Act (Ontario) https://www.ontario.ca/laws/statute/90o01

Ontario Employment Standards Act https://www.ontario.ca/laws/statute/00e41

Pay Equity Act (Ontario) https://www.ontario.ca/laws/statute/90p07

Personal Health Information Protection Act (Ontario) https://www.ontario.ca/laws/statute/04p03

Personal Information Protection and Electronic Documents Act (Canada)

https://laws-lois.justice.gc.ca/ENG/ACTS/P-8.6/index.html

Privacy Act (Canada) https://laws-lois.justice.gc.ca/ENG/ACTS/P-21/index.html

Securities Act (Ontario) https://www.ontario.ca/laws/statute/90s05

Trustee Act (Ontario) https://www.ontario.ca/laws/statute/90t23

Workplace Safety and Insurance Act (Ontario) https://www.ontario.ca/laws/statute/97w16

Our heritage preservation activities are facilitated by:

https://www.ontario.ca/laws/statute/90o18 , the Planning Act,
https://www.ontario.ca/laws/statute/90p13, the Municipal Act
https://www.ontario.ca/laws/statute/01m25 and the Provincial Policy Statement,
https://www.ontario.ca/document/provincial-policy-statement-2014
Canadian Environmental Protection Act https://laws-lois.justice.gc.ca/eng/acts/c-15.31/

Appendix B: Sample Application for Branch Status

We wish to apply for status as a Branch of the Architectural Conservancy of Ontario.

Name of Group:

_____

Catchment Area:

Please indicate the catchment area your group will cover e.g. regional municipality, city, town, township or combination thereof:

_____

Interim Executive:

Please provide the names and contact information of the persons filling these positions:

President:

_____

Vice-President:

_____

Secretary:

_____

Treasurer:

_____

Anticipated Membership: _____ # of people

Brief Description of Major Heritage Issues in Your Area:

Send completed form to
Will Coukell, ACO, 401 Richmond St. W., Suite 206, Toronto ON M5V 3A8
will@acontario.ca   416-367-8075 x402   1-866-221-1420

Appendix C: Possible branch role job descriptions

Contact kaeelgie@yahoo.comf or more information.

ACO North Waterloo Region	
Executive Committee Member	
Created by: Kae Elgie	**Date Created:** 2015
Approved: May 2016	**Date Revised**: May 2016

Position

Member of the local branch Executive Committee.

Authority and Responsibility

North Waterloo Region is one branch of Architectural Conservancy Ontario, a provincial charity dedicated to education and advocacy work to encourage the conservation and re-use of structures, districts and landscapes of architectural, historic and cultural significance.

The Branch is responsible for supporting the Mission and Objectives of the provincial organization ACO Inc., for managing its own membership, programs and finances, within the parameters and guidelines established by the ACO Inc. Board. It sends a voting representative to the ACO Inc. Board, the decision-making body for the organization (currently four meetings a year).

The Branch Executive Committee is the decision-making and planning body for the local branch. It represents branch members by appearing at municipal councils, consulting with various levels of government, and issuing statements on local heritage matters. It plans educational activities for branch members and the general public. It is a liaison to the Provincial organization and to other ACO branches, and looks for ways to support their actions and interpret them to both branch members and the general public.

The Executive Committee generally meets monthly, except for July and August. Meetings are two hours long, on a mutually agreeable evening of the month, e.g. third Wednesday, fourth Thursday.

Certain members of the Executive Committee have specific responsibilities. Members At Large support other committee members. Frequently, they propose and carry out a project or activity of personal interest which is also deemed worthwhile by the rest of the Executive Committee.

Roles

The President presides at all meetings, is the contact person and spokesperson for the Branch, handles branch correspondence, and is the liaison with the Provincial Board and Provincial Office (unless another Executive Committee member is appointed to do this).

The Vice President assists the President, carries out the duties of the President in that person's absence of inability, and performs other duties determined by the Executive.

The Membership Coordinator works to expand the number of local members and keep current

members enrolled, updates online membership database to ensure that Provincial office and other Executive members, e.g. Communications Coordinator, have an accurate list of current members' names and addresses, and sends thank you letters and renewal notices. Membership Coordinator needs to have Internet and computer access. Membership Database training will be supplied.

The Treasurer receives and deposits membership fees and other donations, drafts tax receipts to be signed by the Provincial Board Treasurer, pays expenses, keeps proper records of receipts and disbursements in QuickBooks accounting software, supplies all information requested by Provincial Office for the general audit of ACO, and produces financial statements for the branch's Annual General Meeting and such other meetings as the Executive Committee decides. Treasurer needs to have Internet and computer access. Training in QuickBooks accounting software and treasurer duties will be supplied.

The Secretary keeps proper minutes of all meetings. A copy of the minutes of all meetings will be sent to Provincial Office. Minutes shall be turned over to the Archivist for the permanent records of the branch once a year, at the time of the Annual General Meeting.

The Communications Coordinator ensures that regular communications about Branch activities go out to members and the general public. Communication tools currently in use include:

- a website www.aconwr.ca
- a bimonthly newsletter, currently published in both print and electronic formats
- frequent email updates about upcoming events and issues to members who have consented to receive them per Canada's Anti-Spam Legislation.
- a Twitter account @ACONWRB
- a Facebook page https://www.facebook.com/ACONorthWaterloo
- an Instagram account aconwr

Term

Executive Committee members serve for a two-year term from the date of the Annual General Meeting at which elected. At the conclusion of such a term of office, a person may be re-elected to a maximum total of four terms, or eight years. After a two-year absence, a member may stand for re-election to the Executive Committee. Vacancies arising on the Executive Committee may be filled by the Executive, and the individual so appointed shall serve until the next Annual General Meeting.

Duties

An Executive Committee member is fully informed on organizational matters, and participates in the Executive Committee's deliberations and decisions in matters of policy, finance, programs, personnel and advocacy.

Establish the organization's mission, vision, and direction

- Vision and values

- Mission and philosophy
- Strategic planning
- Programs and services
- Evaluation

Ensure the financial health of the organization

- Responsible for ensuring there are adequate financial resources for the work of the organization

Direct organizational operations

- Responsible for ensuring that the organization and its Executive Committee are in compliance with its legal requirements - established by the Provincial organization.
- Responsible for ensuring that the Executive Committee works effectively
- Assess Its Own Performance

Ensure effective community relations

- Respond to changing needs/pressures in the community
- Proactively anticipate issues; reactively respond quickly to critical issues; create climate to prevent future issues
- Find new ways to meet needs
- Use marketing and public relations

Qualifications & Skills

- ACO North Waterloo Region's Executive Committee is comprised of up to 12 individuals with a diverse set of disciplines and expertise. Community members from all cultural backgrounds are encouraged to apply.
- Support the purpose and objectives of Architectural Conservancy Ontario: "Through education and advocacy we encourage the conservation and re-use of structures, districts and landscapes of architectural, historic, and cultural significance."
- Interest in one or more of the following is an asset: architecture, history, the environment, local heritage, local economy, municipal planning. No experience needed, just a desire to learn.
- Ability to make the minimum time commitment as detailed below.
- Ability to contribute specific skills and attributes to the organization.

Benefits: Personal

- Opportunity to represent a long-standing, impactful organization.
- Adds balance to your paid work and provides personal fulfilment.
- Adds to your curriculum vitae by demonstrating active involvement in the community.
- Provides a forum to learn about architecture, heritage, land use planning, environmental impacts of adaptively re-using heritage buildings, communications, and advocacy techniques.
- Provides an inter-disciplinary environment:
  - o to learn from one another in a ``network of knowledge``

- o   to assist in, and appreciate thinking outside your own ``disciplinary box``
- Opportunity to broaden yourself and your ability to relate to our community.

Benefits: Community
- Opportunity to enhance the liveability, sustainability and cultural richness of our community.
- Opportunity to offer your skills, expertise and enthusiasm to a good cause.
- Opportunity to shape the future of our built and natural landscape.
- Contribute to strengthening ACO as an organization and continue with its beneficial activities.

Approximate Minimum Time Requirements

Item	Length Per (hours)	Number per Year	Total Time per Year
Executive Committee meetings	2	10	20
Sub-committee or ad hoc meetings	2	4	8
Meeting preparation (documents review, research, etc.)	2	10	20
Feedback to President on issues - study issue, prepare response	1	6	6
Public events (as official ACO-NWR representative)	3	2	6
Most activity takes place in the 10 non-summer months. So monthly estimate is total hours divided by 10.		Total	60 hrs/year 6 hrs/month

Estimated annual financial costs: transportation <$100 = getting to meetings held in Executive Committee members' houses, or to public events in North Waterloo Region. Travel to represent the branch at ACO Inc. Board meetings is subsidized.

Appendix D: ACO London Communications Guide

This document is an example of how one ACO Branch manages its communications.

Email

The info@acolondon.ca is the main email account for the organization. It is managed through the ACO London Google Drive account (under the auspices of the Urban League). The account can be set up to also send messages to a personal account as a back-up but ACO London emails, including Board messages, should be sent from and responded to via the Google Drive platform rather from a personal email. *Note Branches may be able to use the ACO server; please speak to the ACO COO about using acontario.ca as your link*.

Statements and letters to City Hall on behalf of ACO London should be sent from this account or CC this account so there is an archive of these communications; all Board members should also be BCC'd so they are up-to-date on executive decisions and communications. *It is recommended that the email account be checked and messages dealt with at least several times a week to maintain and ensure a high level of public trust.*

The ACO London email account was set up under the banner of Communications Coordinator and it does not seem that this can be changed. *Please ensure that emails always include the name of whomever is sending the message.* Personal email accounts will obviously also be used in day-to-day communications with fellow Board members, other key volunteers, committees, etc. but it is recommended that people create personal ACO London signatures to use for organizational communications — even for internal emails.

In order to protect privacy and help prevent digital identity theft, it is recommended to add the following note (or something similar) to emails that may be shared beyond internal ACO London volunteers: ** *Please feel free to share this message with friends and colleagues but please delete all personal contact information, and use BCC to protect privacy and help prevent digital identity theft.*

The Google Drive account is also set up with current Board, Executive, Policy Committee, etc. contacts and internal mailing lists to facilitate email communications. Please note that there will be duplication if sending to multiple lists so it's best to delete duplicate contacts from the 'send to' fields to avoid overwhelming (and annoying!) recipients. The contact/ mailing lists need to be kept up-to-date as Board and committee members come and go.

Incoming Messages

ACO London receives a variety of types of messages, including mailing lists to which the organization has asked to be subscribed to receive important and current news. *Please consider carefully before asking to have ACO London removed from a mailing list*. These messages can be deleted or forwarded with comments to the Board, Policy Committee, or other committees/individuals as appropriate. A brief review of City agendas and notices will

help identify possible heritage-related issues that may be important for the Board and/or Policy Committee to see. Incoming emails from mailing lists will include:

- London Advisory Committee on Heritage (LACH), Planning and Environment Committee (PEC), and City Council meeting agendas

- Planning Department notices

- Urban Design Peer Review Panel meeting agendas

- City of London media and news releases

- Various organizations including the Urban League of London and community/ neighbourhood groups including those in heritage neighbourhoods

- Various heritage organizations including other regional ACO branches, provincial ACO, the National Trust for Canada, and the National Trust for Historic Preservation (US)

- Non-profit umbrella organizations including Pillar Nonprofit Network and Charity Village news, continuing education events / webinars, and events

- Google news alerts for "heritage" in Canada (daily) and ACO London (as occurs)

The other main type of email the organization receives is enquiries from Members and the general public with a variety of questions including requests for assistance/ recommendations for heritage trades or professionals. ACO London cannot provide recommendations but can direct people to online resources such as ACO North Waterloo's Directory of Heritage Practitioners (https://aconwr.ca/dohp.php) until such time as ACO London's own online Directory is launched.

Other messages may include applications for ACO London's Historical House Sign program (https://acolondon.ca/buy-historical-house-sign), enquiries on specific heritage properties or issues, applications for the Scholarship or Restoration Grant programs, nominations or sponsorships for the annual joint London Heritage Awards, etc. ACO London also receive requests from other local heritage-related organizations to forward or share messages to the mailing list. There is no obligation, nor should there be any expectation, to do this. The organization's mailing lists should be used judiciously for ACO- focused initiatives. Most of these types of requests to promote events, etc. can — if appropriate — be included in the regular monthly bulletins.

Older archived emails in the account may help with replies to such messages, **if in doubt** ask an experienced member of the Board for advice. ACO London receives very few harassing messages but I recommend discussing them with the Executive who may have advice on how to handle these issues.

Outgoing Messages

The info@acolondon.ca email account should always be used to send out media alerts and releases including Heritage Award nominations and honourees, statements on topical heritage issues and news, and any other important official announcements (e.g. new branch president). These should be sent to all local elected officials (City Council, MPPs, and MPs), key Planning Department staff, community stakeholders and partners (e.g. Urban League, heritage neighbourhood associations, local heritage organizations), local media, and of course BCC the ACO London Board and other reps as appropriate. These announcements should also be concurrently posted to the ACO London website and social media channels.

Pillar Nonprofit maintains a local/regional media list on their members-only resource list (log-in required). It is currently somewhat out-of-date but remains a good resource nonetheless and they have said that they plan to have it updated. A more current one has been uploaded to the shared Google Drive under the Communications folder.

Other types of outgoing messages may include enquiries to City staff, appeals for volunteers, correspondence with community stakeholders and partners, etc.

ACO London also maintains a MailChimp database of Members, Friends, Partners, and Geranium Tour Volunteers and Attendees. MailChimp is an online automated email platform that is used to send the newsletters, monthly bulletins, and other mass communications. The MailChimp lists can be exported as needed and used with the regular ACO London email account on the Google Drive platform.

A mailing list sign-up sheet on a clipboard is put out at most ACO London and community outreach events where the organization exhibit so that members of the public can add themselves to the mailing list. After each event, it is important that these new email addresses be added to the Friends mailing list noting the event at which they signed-up, and then the sign-up sheet be shredded for privacy reasons.

One of the key benefits of MailChimp is that it helps ACO London comply with federal digital privacy legislation by allowing subscribers to automatically unsubscribe at any

time. The other key benefit is that the organization can track the success of messages sent to subscribers to see how many opened emails, which links they clicked on, etc. *Access to the ACO London MailChimp database is on a need-to-know basis and contingent on signing the Confidentiality Agreement. These contacts and lists are not to be shared with or sold to any other organization including ACO Provincial, Heritage London Foundation, etc.*

Facebook, Newsfeed / Posts

If you are an authorized Facebook page administrator, look for content that's local or regional built heritage-related, also 'smart growth' such as London Plan; sustainable city-building (adaptive reuse, walkable neighbourhoods etc.); news re London's historic neighbourhoods; check the local news outlets (LFP, CTV London, CBC London, The Londoner, Strathroy Age Dispatch, etc.) online for news to share. Post original source links wherever possible rather than second- or third-hand Facebook shares (e.g. Vintage London via London Area Heritage Facebook group). Obviously ACO London's own events, statements, newsletters, etc. are important content to share and promote (use website or social media links as appropriate)!

It's also sometimes worth commenting as ACO London on heritage-related news stories on media feeds to help dispel 'myth-conceptions' and clarify/promote ACO London's perspective (beware of making late-night, knee-jerk comments consider whether it is best to comment as an individual or as ACO London….)

Copy direct article links & paste to ACO London FB page with brief note and/or quote(s) from the article. The URL link can be deleted from note field as soon as it appears below (article won't be deleted from posting, only from appearing in the note field– it looks 'cleaner' and more professional). Sometimes the page may have to be re-loaded and re- paste the link several times before the link properly posts with its image to the page. If there are several image options, choose one that is most suitable and click-on the others to delete them.

To tag FB accounts of other organizations in posting (those mentioned in article, those you want to notify of the article such as partner organizations, City, etc.), type @ followed by name/acronym of the related organization. Be careful to use the correct FB link - sometimes there are additional unofficial pages for organizations, sites, businesses, etc. You may need to verify the correct FB link by visiting the organization's website and/or look for their official FB page. A drop-down list will appear, use down arrow key to scroll through and hopefully the appropriate link will appear, click **Enter** and it will automatically link. Continue typing – link will also alert related organization(s) that they have been 'tagged' in your post.
Some relevant organizations' pages we tag regularly: @Heritage London Foundation; @London and Middlesex Historical Society; @Urban League of London; @London Heritage Council; @Vintage London, Ontario; @London and Southwestern Ontario History; @Historic Woodfield; @Bishop Hellmuth Community Association; @SoHo Community Association; @Old South Community Organization; @People of Downtown London; @Riverforks; and @City of London, Ontario - Municipal Government (this is City of London, not Council - a subtle but key difference depending on the context; most of the councillors also have their own FB pages). There are obviously many more pages and new ones will continue to crop up!

It is *not* recommended to automate the FB feed to post to Twitter. The two work quite

differently and have somewhat different demographic audiences. Some stories will appeal to both audiences but to be effective, they're posted quite differently. The ACO London Twitter feed can to be more broad and 'unorthodox' as that audience is less 'traditional' in their interpretation of heritage issues and more open to new approaches, ideas, etc.

It's all about being Social! Share, be generous, 'like', comment, be friendly, fun, warm, approachable, enthusiastic, concerned — even irreverent! Don't be afraid to take a stand but be sure of facts and verify them before stating something and/or taking a strong position. You may want/need to check with Board on particularly contentious issues. Feel free to post several times a day as news dictates.

Always remember that a) you are posting as ACO London, not yourself; and b) you don't need to respond to every comment or justify ACO positions — sometimes the cranks and trolls should simply be ignored.

News Sources

Google news alerts for "Heritage" and "Architectural Conservancy" Canadian news stories containing these terms are set up to be delivered to info@acolondon.ca. Use as relevant.
London Free Press
http://www.lfpress.com Local News, Local Entertainment, Opinion, Homes

CBC London http://www.cbc.ca/news/canada/london Latest news stories

CTV London http://london.ctvnews.ca Latest featured Video clips and news stories

The Londoner http://www.thelondoner.ca Local News, Local Entertainment

Strathroy Age Dispatch http://www.strathroyagedispatch.com Local News, Local Entertainment

St. Thomas Time Journal http://www.stthomastimesjournal.com Local News, Local Entertainment

Page Feed
Click on 'See Pages Feed' (right-hand side banner), scroll down for postings from other organizations that have been 'liked' by ACO London. Not all 'liked' pages will appear in the feed (don't ask - it's FB, no one knows how it works!) so try to visit other ACO pages such as ACO Windsor, North Waterloo, Hamilton, etc. from time to time and help support them by 'liking' some of their postings. Anything of related interest (local built heritage, etc. and/ or big picture – provincial/national/international – that may resonate) can be shared along with an added note elaborating/highlighting/clarifying content.

Events
Whenever ACO London is hosting any free or paid event (Awards, AGM, Geranium Tour, etc.), a FB event page should be created (see past events for suggested templates; if appropriate, co-

ordinate with partners about who will create event pages for shared events).

Click on 'Create Event' and complete fields as appropriate — double-check details such as dates, times, addresses, etc. *Always* include an eye-catching relevant photo of appropriate scale - either one from ACO London or something appropriate from Google images. Event details should be informative and welcoming in tone. Include Eventbrite ticket links as needed in the Ticket URL field. Other organizations and businesses such as partners, vendors, etc. should be tagged in the description field. Co-hosts can be added in that field when appropriate. Events can be prepared in advance as 'draft' and/or scheduled for automated future posting (click on down-arrow beside 'Publish' button for options).

Share ACO London events on FB group pages such as 'London Area Heritage', 'Things to Do in London', heritage neighbourhood/community association pages, etc. as appropriate as well as on the organization's Twitter feed. As the event approaches be sure to post links to any relevant media coverage or stories that may be of interest to potential attendees.

Be sure to try and answer any questions that are posted to the event page in a timely manner.

Twitter

Look for content in the ACO London feed that's local/regional built heritage-related, also 'smart growth' / city-building such as London Plan, sustainable community building (adaptive reuse, walkability, etc.), news/events re London's 'heritage' neighbourhoods, and/or big picture provincial, national, and international heritage issues, etc. Promote and post ACO London events and news! Content related to Google news items that may be of interest to share can usually be found on relevant media outlet Twitter accounts. You can also add commentary in the note field if you wish but it's not necessary.

News found in local media sources (see above, they are also included in ACO London's Twitter feed so you can also simply re-tweet) can also be posted with a brief note. Check #LdnOnt feed for possible stories of interest; only use a few appropriate hashtags such as #Heritage, #Reuse, #NoDemo, #LdnOnt, etc. as appropriate. Tag others as appropriate in the tweet itself or the photo; double-check that you have the correct twitter handle!

To tweet new content, click on the 'What's Happening' field or the Tweet button (top right). *Always try to include an appropriately scaled photo or image* in your posting as it garners more interest, retweets, etc. Unlike FB, Twitter doesn't always automatically bring up photos included in the linked article - you may have to save the image to your device and add it to the post by clicking on the 'Add Photo' camera icon (several photos can be used without reducing your word count). URLs that are long should be shortened using https://bitly.com or similar link-shortening service (simply go to the bitly site and paste link, it will be automatically shortened and you can simply copy the new shorter link and paste it into your tweet).

It is not recommended to automate the FB feed to post to Twitter. The two work quite differently and have different demographic audiences. Some stories will appeal to both audiences but to be effective, they're posted quite differently. ACO London's Twitter feed tends to be more broad and 'unorthodox' in coverage as that audience is less 'traditional' in their interpretation of heritage issues and more open to new approaches, ideas, etc.

It's all about being Social! Retweet, be generous, click on 'Favourite', be friendly, fun, warm, approachable, enthusiastic, concerned — even irreverent! Don't be afraid to take a stand but be sure of facts and verify them before stating something and/or taking a strong position. You may want/need to check with Board on particularly contentious issues. I post several times a day but that's entirely up to you! Reply *if need be* (consider this carefully - Twitter can get ugly fast!)

Always remember that a) you are posting as ACO London, not yourself; and b) you don't need to respond to every comment or justify ACO positions — sometimes the cranks and trolls should simply be ignored.

Website

The following are appropriate content to be added to the ACO London website http://www.acolondon.ca on a regular and timely fashion: ACO London events, official statements, letters to City Hall, links to *positive* local media coverage, newsletters, calls for Awards/Scholarship submissions, etc.

The website administrator(s) can format and tag new content as needed. Use resulting website links in social media, Eventbrite, etc. posts as appropriate.

Monthly Email Bulletins

The monthly abridged version of the ACO London newsletter is sent via MailChimp to Members, Friends, and Partners at the beginning of each month (summer months may be combined depending on seasonal issues and events). The monthly bulletin usually features one or two key local issues and/or events, a chronological list of local area heritage/ architecture events for that month, as well as any calls for volunteers and/or advocacy support, recent media coverage, etc. as appropriate.

There is an existing bulletin template in Mailchimp but new templates can also be created from other previous issues. Content blocks can be edited, moved around, and/or deleted during the design step as appropriate. New photographs can also be added and re-sized as needed. The formatting can be finicky so extra time (and patience) may be needed to ensure good results. Double-check all URLs to ensure that they are correct. *It is strongly recommended to send at least one test message to verify content, links, formatting, etc. before sending to list members*. Once the first bulletin has been sent, duplicates can be created and details updated. Once bulletins have been sent, open/read stats can be seen.

Older archived bulletins may help to inspire content; if in doubt ask the president and/or Board for suggestions on appropriate and timely content.

Media Advisories and Releases/Statements

Media releases/statements are important public relations tools and should be drafted in collaboration with the president and/or relevant committee chair as appropriate. Examples of media opportunities include announcing the annual lists of London Heritage Awards nominees and honourees, the annual ACO London Scholarship recipient, and the Geranium Tour.

Other key media opportunities include statements on important and timely advocacy issues such as the recurring Top Ten 'Buildings on the Brink' list, 'good news' initiatives such as the launch of the proposed heritage professionals and trades database or innovative partnerships (one-off or regular), etc. The tone, content, and format of the release is critical. Older ACO London media releases are archived on the shared Google drive Communications folder; if in doubt there are many examples online that will help with creating appropriate format.

Media advisories can also be sent to invite media to events, announcements, etc. These should be quite brief and only need to contain key 'who, what, why, where, when details and should only be sent 2-3 days in advance of the event, announcement, etc. Ensure that event announcements are planned in detail and coordinated well in advance, and that all invited key representatives / spokespeople are appraised of event / announcements details and have notes in hand. A media contact should be appointed to greet media, answer basic questions, arrange interviews, introduce media to key event representatives, etc. Ensure that a full detailed media release is ready to share via the website, social media, and email as soon as the event / announcement is over — triple-check spellings, dates, etc. of all details.

Releases should be sent via Google Drive info@acolondon.ca email to the media list (see shared Google Drive Communications folder), local elected officials, key City staff, community stakeholders, partners, etc. All Board members should be BCC'd along with any email addresses that are private/personal (as opposed to business, organizational, institutional addresses that are publicly available).

Eventbrite

Eventbrite event pages should be created for all major free or paid ACO London events (Awards, AGM, Geranium Tour, etc.). The organization's account allows for past events to be duplicated and updated with new details — this saves a lot of time. The banking information has been set up for automatic deposit and that remains consistent unless bank account changes are made at the branch, in which case the Eventbrite details will need to be updated to ensure payment. If a completely new type of event is being organized, a new Eventbrite event page will need to be created.

Complete and double-check all details such as dates, times, addresses, etc. Always make sure to include an eye-catching relevant photo of appropriate scale - either one from ACO London or something appropriate from Google images. Event details should be informative and welcoming in tone. Hyperlink partners, venues, featured sites, etc. in body text as appropriate.

Tickets prices, times for sales, cut-off ticket sales dates/times, etc. can all be updated with new details. A wide variety of additional features (waiting lists, ticket questions, etc.) can be used to help fine-tune the event and tickets. The help section is quite robust and will no doubt resolve any questions. Always log out and search for / check the event page from the main Eventbrite site to ensure that everything is working as it should. Small details such as dates/times for ticket sales to be open can make event pages invisible, shutting off ticket availability/sales which can be very frustrating.

Events can be prepared in advance as 'draft' and/or scheduled for automated future publication. Attendee lists can be exported and/or printed for check-in purposes at the event. After the event, Eventbrite will send an email with deposit details and will automatically transfer funds to the ACO London bank account.

Always make sure to log out of the account to protect banking information and the privacy of attendees contact information.

Branding & Marketing

The ACO London 'brand' is tied to the provincial ACO brand by virtue of being a branch of the parental umbrella organization. For many reasons, including fiduciary and legal obligations, it is important that branches have an obvious connection to the provincial organization through brand recognition. The consistent use of these design elements also makes ACO London look professional and technologically-adept — a critical issue for attracting younger supporters and dispelling the popular 'myth-conception' of heritage buffs being out-of-date.

The ACO logo, colours, typefaces, etc. which make up the organization's visual 'brand' were all created by ACO provincial in collaboration with a design firm hired for this work. Please use only the ACO logos are in the ACO London shared Google drive Communications folder. The colour, typeface, and logo specifications are all outlined in the design manual which is also in the shared Google drive Communications folder. Unfortunately, the manual does not include specifications for use on websites or social media so there is some leeway there in terms of using the colour, typeface, and logo. Consistency and high-quality design are key to their — and ACO London's — success.

When creating communications or marketing materials (e.g. posters, flyers, newsletters, swag, etc.) for specific events or for general organizational promotion it is important to ensure

that the person doing the work has copies of the correct full-size logos, the design manual, and — although they need not be professional graphic designer — is adept at producing high quality and creative design. *Like the finely -crafted heritage buildings ACO London advocates for, the organization's own visual designs should be of an equally high standard.*

Community Outreach

It is vital for ACO London to engage with people outside of the small heritage community and continue to grow supporters and members. Community events are a key way for volunteers to help promote awareness and education of heritage issues and ACO London itself. There are a number of such opportunities throughout the year and many including traditional neighbourhood events such as Gathering on the Green in Old South, the Old East Village Block Party, Woodfield Fair, etc. are free or low-cost. It also goes without saying that there should be an ACO London display at ACO London's own events such as the Geranium Heritage House Tour, the London Heritage Awards, etc.!

There are also important opportunities to reach non-traditional but supportive audiences at festivals and events like Home County Festival, home show(s) at Western Fair, and other special events. These larger events may have exhibitor fees but the investment may be worthwhile depending on the potential audience reach. Promote ACO London's attendance at these events on social media and invite people to visit the display. Take photos of the display and volunteers to share (with permission!) on social media.

Reach out to members via email *at least* several weeks ahead of time to recruit volunteers to staff the display booth before using Board members to fill any gaps. Outreach events are a great way to engage with members and other volunteers in actively supporting and being involved with ACO London. They're also a great way for members, volunteers, and Board members to meet and get to know each other — try pairing newer and long-time members as a way of mentoring people.

It is recommended to use the pop-up tent at all outdoor events (removable wall panels may be needed for multi-day events or poor weather conditions). A display table and chairs will need to be arranged for use from a member or volunteer unless provided by the event organizers. The ACO London exhibit bin contains most of the materials that may be needed including a table cloth, book stands, bowls for buttons, cashbox, etc. The bin should be checked and fully -stocked with up-to-date materials before and after the event.

As with any marketing opportunity, ACO London's 'brand' and visual presentation is key to making a good impression to potential members, donors, and supporters. Resist the urge to put every past and current ACO London publication or material on display as this only makes for a cluttered table with no key focus points. Consider the audience, time of year (any upcoming ACO London events?), neighbourhood, etc. and put out materials that may be of

particular interest accordingly. Additional materials can be kept 'backstage' and brought out if needed. Likewise, with materials for sale — check that sales are permitted at events and ensure a cash float at hand. Always have free buttons, bookmarks, and a sign-up sheet and clipboard with pen on the table and invite people to sign up for the mailing list!

Appendix E: ACO Cobourg Goal Setting template

for more information contact Diane Chin dianemchin@gmail.com

MISSION:

The Mission of the Branch is through education and advocacy, to encourage the conservation and reuse of structures, districts and landscapes of architectural, historic and cultural significance, to inspire and benefit the people of Ontario. It implies:

- Identification of such structures and locations within Cobourg and East Northumberland;

   PRIORITY

   PLAN

- Development and implementation of educational initiatives to heighten awareness of the importance of these structures and locations;

   PRIORITY

   PLAN

- Provision of financial assistance, where appropriate and possible, to assist in preservation and

restoration as well as in the development of associated skill sets through educational assistance;

PRIORITY

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- Provision of knowledge-based advice for preservation and restoration projects, where feasible;

PRIORITY

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- Advocacy of said activities with government, business and the public at large;

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- Partnership with local government in joint-venture projects where possible.

PRIORITY

PLAN

- Fundraising to support the Branch's mission.

PRIORITY

PLAN

Appendix F: A Guide to Editing ACO's New Website
(www.acontario.ca)

Before we start: This is your guide to entering and changing information about your branch on the back end of the ACO website. If you just need to update your own personal info you can do that by logging in from the front end (go to www.acontario.ca and click members → login).

Login: Go to http://www.acontario.ca/admin/ and enter your username and password (the same ones you used on the old site). This will take you to the Dashboard.

If you cannot log in: click 'Forgot Password' to set up a new password.

When you log in you will see your name appear in top right corner of the dashboard. This is the spot where you will log out later, when you are done.

The navigation is on the left side of your screen. We will work down the list from the top to the bottom:

MEMBERS

If you click on 'Members' you will see three items below it:

- **Summary**
- **Add a New Member**
- **Download Excel**

Summary

All of your current branch members should appear here in a list, alphabetically by last name. You can search for members using the search field in the top right. You can edit information about any member by clicking on the blue edit icon next to their name.

If you edit any member info, remember to click 'Save' before you leave.

Add a New Member

To add a member to your branch, simply click Members → Add a New Member and then enter their full contact info (including email address), leaving the top field (membership number) blank. This will be generated automatically. Remember to click 'Save' at the bottom of the page before you leave. When you are entering information, every field that is marked with an asterisk is required. If you are having trouble with a page refusing to save and close, check first to see if there is a required field that is empty (this applies to every section of the site).

Download Excel

This allows you to download your member list in Excel. Please ignore the Branch Name field at the top (it reads 'Cobourg and East Northumberland' and is greyed out, so it looks confusing). If you click 'Create Excel' it will export an excel list for your branch.

YOUR BRANCH

If you click on 'Your Branch' you will see four items below it:

- **Edit Branch**
- **Edit Branch About Page**
- **Carousel Images**
- **Add a Carousel Image**

Edit Branch

This is where you can edit all the text that appears when web visitors click 'branch' and then select your branch. This includes your branch links such as social media links (if you have any), contact info for your executive, paypal information (if you use paypal), and text describing your branch's history or activities. When you are done editing or adding information, remember to click 'Update Branch' at the bottom of the page.

Edit Branch About Page

Your branch's About Page is different from its main page. To see where it is (on the public front end of the website), go to www.acontario.ca → Branches → (select the London Region branch) → go back to the upper navigation bar and click 'About' → (select 'About the London Region branch'). This is the example given because the London Branch has filled this out this page.

You may have noticed that when you selected the London Region branch, the logo in the top left corner switched to the logo for the London Region branch. Now, 'News and Events',

'Buildings at Risk', 'Resources' and 'Publications' will all be specific to the London Branch until you either select another branch or click 'Home' on the far left of the navigation bar.

After you've done this, select another branch and click on 'About'. You will see that if this page has not been filled out at the back end, you will not see anything specific to this branch under the 'About' tab.

You may choose to use this page or not, it is completely up to you. To add or edit information, click on 'Edit Branch About Page' and add text and/or images, whatever you like. Remember to save it before you leave.

Carousel Images

When you click Your Branch → Carousel Images you will see the images that have been uploaded for your branch.

 Click on the blue edit icon to add or change captions, to add a link for the image (if you want it to link to a website), or to delete the image. You can also delete images by going to Your Branch → Carousel Images and then clicking on the red 'delete' icon next to the blue edit icon.

Add a Carousel Image

This is where you upload images for your branch page. First off, the ideal size for a branch/carousel image is 984x400 pixels (horizontal). You do not need your images to be this exact size, but the closer they are, the better they will look. Try to use images that are at least a 2-1 ratio of width-height.

To add images, click Your Branch → Add a Carousel Image. Upload your file and add a title and caption. They will both appear at the bottom of your image; the title on the left and the caption at the right. Remember to click 'Add Photo' when you are done.

You are free to add multiple photos. They will appear as a slide show on your branch page. You can link URLs to your images by clicking 'Make image a link to a URL' while adding your image.

Delete a Carousel Image

Changed your mind? No problem – you can delete images by going to Branch → Carousel Images and click the red delete icon next to the image you wish to delete.

Congratulations! You now know how to control the way your Branch Page looks. Once you have mastered this, you are ready to add news, events, resources and more for your branch.

MINUTES

The instructions for this section will come soon in Part Two.

EVENTS

Adding Events

To add an event, click Events → Add an Event

Time, date, location and contact info are very important for events. If you have a webpage, ticket buying page, or any other place you want people to go, please include an event URL. Even though some fields are not required, please fill out as many as you can to help people understand all the details of your event.

The images in this section (as well as in news and resources) do not have to be same dimensions as the carousel images. Horizontal images are best, but they can be standard horizontal dimensions.

When you are done entering your event info, go to the top of the page where it says 'Approval Status' and click 'Approved'

Where will your event show up on the ACO website? On your branch page, your latest News and Events will show up at the bottom of your branch description. It will also show up on the 'New and Events' tab, both on the main province-wide page AND when your branch is selected.

NEWS

Adding or Editing News Items

In the lefthand column, click News → Summary and you will see all of the news items that have been added for your branch. To edit any news item, simply click on the blue edit button to the right of your selected item, edit as needed, and then click 'Update News' at the bottom when you are done.

Note: you can control when your news item will be visible by using the 'Show On Date' field to control when it will show up (useful if you are adding an item in advance) and the 'Expire News Date' field if the item is time-specific or will become irrelevant after a certain date.

The images in this section (as well as in events and resources) do not have to be same dimensions as the carousel images. Horizontal images are best, but they can be standard horizontal dimensions.

When you are done entering your event info, go to the top of the page where it says 'Approval Status' and click 'Approved' or your news item will not appear.

To add news items, click News → Add a News Item.

A few notes about adding text to the News Content box (and all other text boxes that look like this (these are called a WYSIWYG, what you see is what you get):
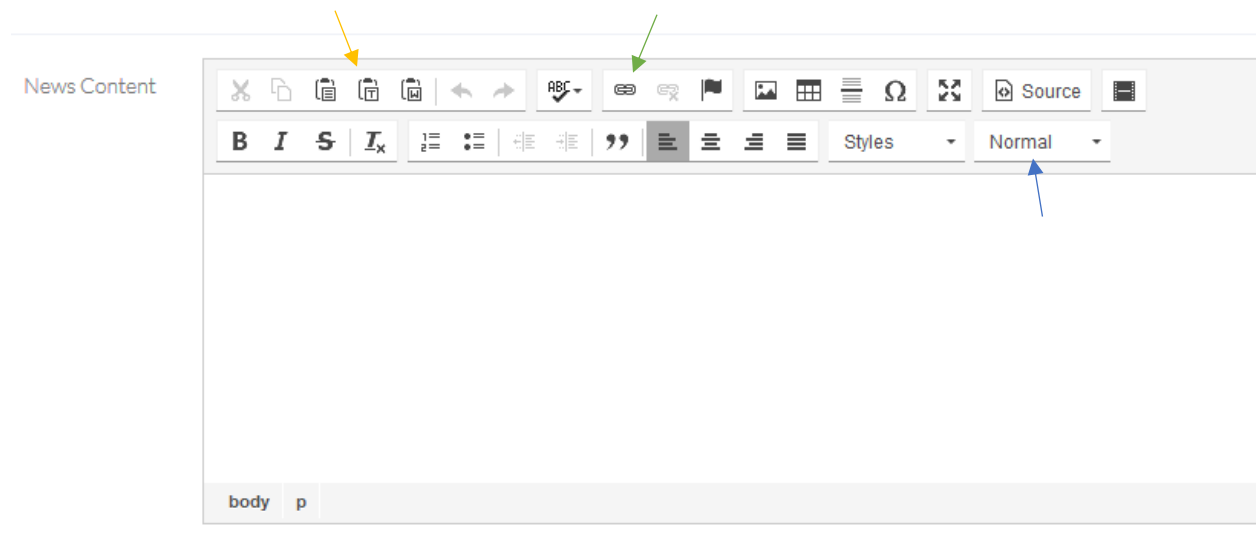
- If you are copying this text from Word (or anywhere else), before doing so, look at the two editing bars right next to the words 'News Content'. See those three little clipboard icons? The centre one with the little 'T' (yellow arrow) will let you paste in text from any source and remove the formatting. Please click on this icon, paste your text into the box, and then hit OK. You can then add any formatting you need, such as bold, italics, larger font for titles, etc. If you click on the rightmost editing icon on the bottom row (the blue

arrow pointing to the word 'normal') you can select text and then apply heading styles to make it look good (and consistent with the website formatting).

- If you want to include links in your text, <u>select the text</u> that you want linked (this might say something like 'click here' or it might be a website URL), then <mark>click on the little 'link' icon</mark> in the editing bar where the green arrow above is pointing (this looks like a horizontal paper clip). In the URL box, paste in the URL you want to link to. Before you leave, click on the little tab called 'Target' and select 'New Window (_blank)' then click OK. This means that when people click on your link, it will open in a new tab, so that you are not taking people away from the ACO website.
- If you have any questions about using this text box and its many functions, you may contact Devorah at development@arconserv.ca or Elizabeth at branchcoordinator@arconserv.ca and one of us will help you.

When you have finished adding your news item, click on 'Add News' – then go to the website, see how it looks, and edit as desired.

Where will your news show up on the ACO website? On your branch page, your latest News and Events will show up at the bottom of your branch description. It will also show up on the 'New and Events' tab, both on the main province-wide page AND when your branch is selected.

RESOURCES

Adding Resources

What is a Resource? On our site, it's information that is free. Documents, listings, anything that is helpful to our members (but not books that we are selling; those are publications).

To add a resource, click Resources → Add a New Resource. By now you should be familiar with the back end, but here are a few notes specific to this section:

- Where it says 'image', that's the image that will appear on the site to illustrate the resource. This can be a logo, a photo or graphic, but it is not a document. You can only upload an image file here.
- <u>Documents must be in .pdf format</u> and they can be uploaded where it says 'Document'.
- If your resource is not a document, you can enter it directly in the box called 'Resource Content'.

Where will your resource show up on the ACO website? On your branch page, your Resources DO NOT appear at the bottom of your branch description. When your branch is selected, it appears in the 'Resources' tab.

PROGRAMS

What is a Program? It's an ongoing project, not a specific event. Examples include PreservationWorks! for the provincial office, and the plaque program for the Stratford-Perth County branch. If your branch has program descriptions to enter, you can do it in this section.

Where will your resource show up on the ACO website? On your branch page, your Programs DO NOT appear at the bottom of your branch description. When your branch is selected, it appears in the 'Programs' tab.

PUBLICATIONS

The instructions for this section will come soon in Part Two.

BUIDINGS AT RISK

In the lefthand column, click Buildings at Risk → Summary and you will see all of the Buildings at Risk that have been added for your branch. To edit any building's information or status, simply click on the blue edit button to the right of your selected item, edit as needed, and then click 'Update Building' at the bottom when you are done.

To add a building, click Buildings at Risk → Add a New Building. When you are done entering your building info and image, go to the top of the page where it says 'Approval Status' and click 'Approved' or your building will not appear.

Where will your Buildings at Risk show up on the ACO website? On your branch page, your Buildings at Risk will appear below your branch description. It will also show up on the 'Buildings at Risk' tab, both on the main province-wide page AND when your branch is selected.

SPONSORS ADS

ACO's province-wide sponsors will appear on every branch's page, to the right of the main carousel image(s). This default will be overridden if you have your own sponsors you'd like to recognize. If this is the case, first gather logos (ideally square images, 80x80 pixels), and then click Sponsors Ads → Add a New Sponsor. In the URL field, enter the sponsor's website so that people can click through and visit our sponsors.

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Thank you for your patience as we all learn to navigate this new website. We will send you more instructions soon, as well as ongoing suggestions to make the website work well for you and your branch. If you have any questions or require help with the website you can contact Devorah at development@arconserv.ca or Elizabeth at branchcoordinator@arconserv.ca and we will help you.

Appendix G: How do Branches process local memberships?

ACO has developed a step-by-step guide for processing local branch memberships titled: How do we process local branch memberships. We encourage branches to process local memberships on line through the ACO website. The guide is designed for the individual in the branch who has volunteered to process branch memberships.

This information is for whoever is processing memberships for your branch locally (membership coordinator, President, whoever YOU have decided). If it changes you must contact the main office and have the login credentials changed to the new person.

Again, it is quicker, more efficient and easier for your members to process their memberships online. You may have to provide assistance to those not too familiar with computers - they will need to log in to their membership to renew. New memberships (and those never logged into) have the postal code, including the space in the middle as the first password. However, if the password doesn't work, we recommend that members use the "forgot my password" button. It will send the password to the last email address recorded on the system for that member. It does take a while as we use a system used by others as well, so there is a lag of 10 minutes or up to an hour at busy times, to send the password.

If member fills out a paper form and pays by cheque/cash

- Photocopy cheque (no need to photocopy cash)

- Deposit in the bank within 5 days of receiving membership fees

- Check the member's contact information and update in the database: first and last name, mailing address include the unit number and postal code, email address and phone number - this is to ensure that the member will receive a copy of the ACORN magazine AND that they can log in to their membership account and access any documents/features available to members only

- For a new member "add" them to the database, the password for a new member is their postal code

- Postal code passwords should be in capital letters and with a space in between: M5M 1D7

- If you notice that the member has more than one membership, make a note and let ACO Central know, we will amalgamate the memberships into one DO NOT START A NEW MEMBERSHIP FOR SOMEONE ALREADY IN THE DATABASE, simply change the details on the old one.

- Provide a list of these new/renewed members to ACO Provincial membership coordinator to manually mark as renewed, this will stop the automatic renewal from being sent out to the members during the processing time

Monthly – send to the ACO Provincial Membership Coordinator

- Submit the **bank statement** that reflects the cheques and cash received for the month

- **Deposit slip**/summary

- Your branches bank account number **must** appear on these documents

- Photocopy cheques vertically (up to 4 cheques per page) and make sure it is **clear and legible**
- Notes explaining the transaction and membership information, create in excel
- If a member renews **and** makes a donation, indicate this in your notes
- Please see attachments for examples of each requirement
- If you are the membership person at your branch and do not have access to the online bank account, please relay this to the treasurer of your branch and make arrangements to get the bank statements to you on a monthly basis (or if the treasurer is sending the bank statements directly each month, let us know)
- Send the information as pdf's (if possible) in an email to ACO Central's Membership Coordinator at tai@acontario.ca
- title the files as follows:
    - **branch name-contents-number**
    - for example: toronto-bankstatement-1
        toronto-bankstatement-2
        toronto-chequecopies-1
        toronto-depositsummary-1
        toronto-workbook-1
- If it is a corporate membership, make sure to have a contact person and not just the organization name listed in the database. Email address and phone number are essential.
- If membership is individual only one person should be entered into database, whether the member has a spouse or not – individual memberships should have one filled in name and ONE BLANK NAME. The second name field is for a family membership only.
- In cases where the name of the cheque received and name on the membership form do not match, receipts will be issued to the name on the **cheque received**.
- ACO provincial is to receive $18 from memberships excluding student memberships, please make cheque payable to: The Architectural Conservancy of Ontario

Appendix H: How to use Dropbox

Dropbox is a personal cloud storage service (sometimes referred to as an online backup service) that is frequently used for file sharing and collaboration. The Dropbox application is available for Windows, Macintosh and Linux desktop operating systems. There are also apps for iPhone, iPad, Android, and BlackBerry devices.

Dropbox is divided into folders much like you would see on your computer with files inside these folders.

There are three different ways to access Dropbox files and folders. Two of them simply use a browser (like Chrome, Firefox or Safari etc.) the Third requires an app on your computer and allows you access the folders through the app – the files show up as virtual folders on your computer/phone/tablet. The control is through our end of the system, we add you when you join the Board, and take you off when you leave. The three methods are: use a direct link, use a browser or use the Dropbox app:

1) You can use a link (ACO provides a link for every meeting) – click on the link and you can see the folder and files indicated by the link in a browser window.

2) Use your login to access the files through a browser. Simply open a browser window and go to www.dropbox.com and login. If it's the first time you are using dropbox, you need to set up an account using the same email address that we are sharing with. If you wish to you a different email – we need to add that email address at our end. You just need to set up an account with that email address and it will link. (please note that once you set up the account it sometimes can take a while to synch, usually it's a few minutes but it can be longer so please have some patience.) According to Dropbox the best browsers to use are: Chrome, Firefox, Microsoft Edge, Safari. Note: As of October 2020, Dropbox will no longer support Internet Explorer 11.

3) This is my personal preference. You can download the app. It is not a "program" like Word or Excel, just an app. It does not take up a lot of space on your computer. It makes "virtual" folders and allows you to access documents as though they were on your computer. Some features are only available online, but it gives you most of the features you need (reading a document, saving it with changes etc.).

Tai is available to give Board and Branch members training on setting up if you need assistance.