

THE LANDSCAPE OF GRAND PRÉ WORLD HERITAGE SITE

Stewardship, Governance and Fundraising

*A Model of Innovation, Competitiveness, and
Productivity for the Motivation of Partners*

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Foreword: Part One

Living examples of how the world has successfully merged human struggles and natural history in harmony, while sustaining productivity, are fewer and fewer to be found.

A common theme found in those that still exist is emerging. We cannot rely on government alone, to be the sole trustees of our heritage, and of that which is important to all of us. We must innovate with new strategies that show promise of outcomes of which we dream.

Red Letter has tried to offer something new in consideration of the Landscape of Grand Pré, soon to take its place on the UNESCO world stage: a model that utilizes examples of existing World Heritage Site governance structures while advancing the potential and promise of private sector partnership philanthropy. We have found no existing WHS organization reporting that it has gone this far in considering the important question of sustainability outside of the parameters of government funding.

Inherent in the positive outcome for designation as a WHS is also an opportunity to help the province of Nova Scotia. It is a well-informed assumption that no other region in the world can claim three World Heritage Sites (with perhaps a fourth on the horizon) situated within two hours of one another. The positive prospects this provides for heightened tourism and resulting economic spin-offs are exciting to consider.

When this model tests outcomes in a productive manner, we hope others – even those which are much further afield, on the international stage - can learn from our progress.

In the immediate environment, we know that cash-strapped local, provincial and federal governments – made up of well-meaning leaders trying their best to provide good governance while trying to balance an incredibly complex society - push us to aspire to new standards of productivity and competitiveness.

What an opportunity this presents to those who understand the Outstanding Universal Value of the story of Grand Pré.

Our governments are pushing us to productivity, which has great relevance for this designation. There is no barrier to the UNESCO World Heritage Site Institute producing globally relevant research, providing meaningful professional jobs, and creating new economic activities.

As a society, we know that we need always to be searching for ways to improve and to try new things. Innovation is the key for our sustainability. The old ways, particularly a total reliance on government, need to be re-visited.

We propose a model that is innovative, that tries to anticipate the long-term, and that will leverage present commitments by investing in strong Canadian values, philanthropy and volunteerism among them.

We know that we need to plan more carefully for a changing society, that we need to set benchmarks for success, that we need to measure outcomes and adapt. The Institute will be built with these principles in mind.

We believe that true leaders of the 21st century, willing to take reasonable risks, will always be supported by good governments at all levels. We must be in this endeavour together.

Changing though they may be, these are exciting times.

Foreword: Part Two

A significant part of this report could be looked upon as “Fundraising 101,” highlighting as it does the principles and theories we understand from years of experience in the arena of philanthropy. We know that the best of ideas, the best of goals, often fall short for the most basic of reasons, ranging from wasted offers of volunteerism to a lack of planning and structure, to leaders who are reluctant for whatever reason to make their own commitments first. All this to say, we felt it important to include all of the significant elements in our report, knowing as we do that there is no shortcut to fundraising success at the level required to sustain and grow this project.

The submission to UNESCO provides a wealth of promise and potential for the Site. Fundraising is moving (and has been for some time) to an age of specialization that engulfs so much of the rest of our professional lives as well. The breadth and depth of promise and potential, while commandeering attention, is less helpful with fundraising. Substantial investment will be attracted only if, and when, the promise and potential is expressed in terms of deliverables and outcomes that can be measured. It would be unwise for us, or anyone, to spend too much time trying to guess how Canada and the rest of the world will react to designation of the Site celebrating “outstanding universal value” when more precise predictions can be properly made that can test the focus of the project, starting locally.

Our best thinking is to concentrate upon the partnerships that will be necessary among and between the Stewardship Board, the Institute and the Foundation – each with its own revenue generation targets – for long-term sustainability, and then undertake a short-term objective of @ \$500,000 to test potential support, while transitioning into the refinement of a longer term and exciting vision that will inspire others.

In the end, the intended focus of this report is on the best major gift fundraising structure and practice, as carried out by regional, national and international leaders brought together in a common cause and within the structure of a charitable foundation.

Examples of highly successful charitable foundations supporting outstanding causes abound, even within our limited “catchment area” of Nova Scotia.

The emphasis on major gift work is the core of any reasonable long-term plan. Capital Campaigns, carried out periodically, are not operating and sustaining mechanisms. A solid major gift program is.

A major gift focus, supported by the Foundation, is only one piece of the plan (albeit the one most likely to influence the health and well-being of the Foundation). The efforts of the Foundation must be complemented and supplemented by a comprehensive revenue-generation plan as well.

Finally, while we enjoy being creative in our thinking about the proposed Institute, this project calls for an unusual amount of work to be done in areas that are beyond our expertise. Social scientists, pure scientific research, historians, engineers, teachers, economists, association and leaders of support organizations, local experts, and others have a role in developing the Institute mission and work. We have done our best to position a theoretical “micro” research-driven institute which will stimulate fundraising for the preservation and enrichment relating to the OUV of Grand Pré. It is the very careful development and articulation of details of the vision that will provide the biggest rewards.

A final thought: we know that “people give to people” (and in the case of large gifts, most often people give when asked by their peers). It is essential, from the outset, that the bar be set at the highest imaginable level when the initial leaders of the Institute and Foundation are considered. Nothing short of this will prepare for success.

We acknowledge a significant number of persons who have contributed to the thinking behind this report. We conducted many individual interviews and had group discussions as well. This most certainly is not our work alone but a combination of thoughtful input and visioning by a broad cross-section of people listed in the appendix. This has been a lengthy undertaking and in the course of our many discussions we may have overlooked a participant or two; if so, we apologize to them. But please know we tried very hard to listen carefully to each and every one of you. Thank you for your help.

A final acknowledgment, of the outstanding Case for Support which was supplied at the outset, put together in a skilled fashion by those who began this quest and together enabled this project to be on the agenda of UNESCO as we speak.

The Future of Landscape Grand Pré and its Outstanding Universal Value

Introduction

Many persons have contributed to this journey, to the telling of a particular UNESCO story and the quest for World Heritage Site designation. The proposed recommendations that follow are made bearing (constantly) in mind that this is the integrated story of:

- The natural history of the area;
- The role of the Mi'kmaq people;
- The role of the Acadians;
- The role of the Planters; and,
- The local community.

These groups, with commonality of interest, have joined together to effect an unparalleled number of successful transitions, and together are looking for the way ahead.

This is not the story of, or a challenge for, any single group or entity. In our research and discussions, we found it easy for participants to lose sight of the bigger picture and often of the significant role others have played and will continue to play, beyond July of 2012. In a situation like this, with a number of parties who have an interest in some part of the project, there must be an impartial governing body with the ultimate authority to make final decisions in the best interests of the whole.

Work to Date

A remarkable path has been developed to win UNESCO designation of the Grand Pré landscape as a World Heritage Site. In anticipation of a positive response from UNESCO in July, 2012, matters of future management, operations, other governance issues, productivity, global competitiveness, and funding sustainability are being addressed.

The Need to Strive for Excellence

Excellence in governance, the quest for research that will be attractive to investment, and success with fundraising initiatives will be driven by the size and scope of the vision of “Outstanding Universal Value.” The vision cannot be merely local, particularly as we understand that local issues are well taken care of today. Those who have already made commitments expect this – they have opted to support a vision at a much higher level.

Phase One: Governance

1.0 The Recommended Governance Model

The Governing Model

The governing model must be immediately effective; it must take into account a wide variety of stakeholders; it must ensure long-term growth through measured productivity; it must assure sustainability. Those accountable must meet lofty expectations of many interested parties, ranging from local property owners and citizens to those who would be international investors. It must address alignment with Provincial and Federal goals of regional, national and world competitiveness, business interests, multi-player research partnerships, and activities yet to be determined. These all must be factored into a flexible strategy recognizing the wide diversity of stakeholders.

An extra-ordinary level of cooperation will be required to maintain focus on the common good.

In the months and years that follow this July, much time will inevitably be spent debating the presence and proper exercise of authority. A model of exceptional governance established at the outset of moving forward will minimize this debate. The best models clearly address processes and structures that determine how power is exercised, identify the particular role of each stakeholder group, outline the decision making process (from the most basic to the much more complex) and ensure that mechanisms are in place to guarantee that decision-makers are accountable.

Models of governance most assuredly affect fundraising. An effective process and structure of decision-making, led by a governing board exercising its proper authority, is one of the best assurances of fundraising success. Sophisticated donors are most likely to give significant support to organizations which demonstrate a clear and compelling vision, a sense of priorities and urgency, and which have a board of directors comprised of outstanding citizens of the world.

As we recognize that a strong governance model is key to successful fundraising, it is imperative that the traditional triangle/top down representation used to determine fundraising opportunity is able to be applied. This assumes that those in leadership positions, with the ability to significantly impact fundraising, must be at the top of the pyramid. Inverting the pyramid, so that those who are traditionally looked to for broad lower level support are actually placed in key decision making roles, would have a serious negative impact on the sustainability of the WHS.

In the course of its research, inquiry, and interviews, Red Letter has considered familiar models of

governance in support of high levels of activity in the fundraising sphere, discussed others, looked for sets of similar circumstances, talked with fellow fund-raising professionals, interviewed governance and fundraising experts, studied the work of industry leaders in not-for-profit sectors, listened to interest groups, examined other UNESCO operations, and applied our considerable (more than 40 years) personal and professional organizational experience.

We have had to be innovative. Our research has uncovered no established template, building governance to specifically enable fundraising, ready to apply to this unique and complex mix of ethnic, cultural, geographic, and public/private partnerships. We take pride in thinking that our recommendations might serve as a possible model for current and planned initiatives with similar expectations.

We considered a variety of options keeping in mind three distinct thrusts of preserving and enriching the Landscape of Grand Pré's Outstanding Universal Value.

1. Managing the operations of the Site and Landscape;
2. Attaining the highest of standards in natural, historical and cultural (pure and applied) research initiatives;
3. Sustaining Fund-Raising (to achieve long-term future goals of \$10,000,000 and beyond).

We tested several approaches against a matrix of measurements that included:

1. Our understanding of commitments made to UNESCO and their expectations;
2. A standard that would be world competitive;
3. A structure not too general nor too restrictive;
4. A stimulus to productivity;
5. The flexibility to inherit and adapt to the unknown;
6. The likelihood of co-operation among quite diverse organizations and peoples;
7. The ease and cost of administration;
8. Public accountability in accordance with the expectations and rights of donors and investors;
9. Likelihood of clear and consistent priority and goal-setting;
10. Any applicable legal restrictions;
11. The expectations of current funders (municipality and province);
12. Consideration of the intrinsic nature of a "Landscape of Grand Pré" authoritative entity:
 - a. Is it an organization connected by the heart? (e.g. environment; children's health, animal welfare);
 - b. Is it an organization that provides services and seeks support from the past and present beneficiaries? (such as an alumni organization);
 - c. Is it a member-motivated organization? (members get together in a cause and support it);
 - d. Is it an organization where a single primary founder/donor drives funding of a

- specific cause close to him/her?
- e. Is it a public policy organization – social services partnering with government?

For The Landscape of Grand Pré , we considered and rejected the following options:

A. Using the [established] Stewardship Board as the sole legal entity and governing authority;

We pursue a worldly vision of leadership. The deliberately-localized composition of a hands-on committee, designed to advise on a narrowly-focused process, wisely made up of approximately 17 organizational representatives, has a high potential for contentious and possible acrimonious decision-making. Further, this committee-like structure will not lend itself to attracting world class visionaries to lead aggressive fund-raising, or to partner in the pursuit of “outstanding universal value” research at the national and international level.

B. Forming a single legal entity with over-arching authority and mandate (management, research, fundraising);

A new, modest-in-size, legal, not-for-profit entity, with a mandate to manage, carry out effective research, and undertake major gift fund-raising, will invariably find a complexity and conflict of priorities that will compromise its focus on results. Both research and major gift fundraising require absolute focus and dedication of resources. We found more than one UNESCO World Heritage Site organizations we think to be vulnerable through “trying to do it all themselves.”

C. Integrating the anticipated Provincial Public Trust and its Trustees with the present Stewardship Board, and utilizing the Trust as the fund-raising mechanism of the Board;

As we understand, the province of Nova Scotia will establish a distinct trusteeship mechanism as a “one-off” to carry out a focused decision of the government; there will be no room for a broader mandate. Any Trust brings with it explicit restrictive rules, rights and liabilities.

D. Mixing for-profit and not-for-profit structures, utilizing the simplest of committee and sub-committee structures;

The biggest stumbling block is that donors require charitable status to maximize gifts; there is no room in our vision for a “for-profit” component. A ‘for-profit’ affiliated/adjunct organization could arise out of future research initiatives but it would be no advantage to begin with that as part of the governing structure.

E. Integrating existing organizations of differing legal status, who share values and interest;

Each of several organizations we considered, while conducting activity consistent with some priorities of the Landscape of Grand Pré “Outstanding Universal Value,” is presently organized

and focused on one part of the whole and has adopted its own organizational culture accordingly; these organizations would need to undergo significant change. We specifically considered seeking partnership with Société Promotion Grand Pré, which has the narrowest of focus (on the present site). We considered seeking a partnership with Société Nationale de l'Acadie as it wishes (we understand) to seek funding on the national stage. Yet it, too, has a focus that is but one part of the broader mandate of the Landscape of Grand Pré World Heritage Site – being true to the mission of SNA might conflict with the full potential expressed to UNESCO. We considered universities and colleges, and research organizations. We considered a well-established international institution. Our conclusion: surely the most impactful and potentially productive model can be built with appropriate roles for these (and perhaps other) organizations as partners.

F. Utilizing a new legal entity but out-sourcing research and fundraising;

Building organizational capacity is a fundamental principle of sustainability; out-sourcing fundraising and research is a short-term methodology. It is possible that some outsourcing will be necessary at the outset.

G. Attempting to find a way to mirror the UNESCO Joggins Fossil Cliffs, Lunenburg, and/or the Pimachiowin Aki model(s);

We found very little for us to build upon with these three projects. There seems to be a continuation of reliance on short-term government involvement (with no plan for long term sustainability) that we do not see with the Landscape of Grand Pré nomination. Fundraising from the private sector is probably part of the future of these sites but there is currently no significant experience upon which to build.

H. Partnering with/utilizing the Wolfville, or Nova Scotia, Community Foundation structure;

Community foundations are popular. They offer effective not-for-profit fund-raising models. They are not particularly designed for research investment partnerships. In Nova Scotia, they are limited in scope and not equipped to support focus on a singular cause. The Landscape of Grand Pré will require the latter.

Key Governing Recommendation

Create two new distinct, focused, highly independent yet totally inter-reliant entities, one a not for profit institute and the other a charitable foundation, to lead and finance the vision of The Landscape of Grand Pré and to make best use of the capacities of the Stewardship Board.

We believe that the inescapable conclusion for the governance model that best supports the interests of the Landscape of Grand Pré is represented in the organizational chart attached to this report as Appendix A. We believe it serves all known and foreseeable needs of the preservation and enhancement of the Outstanding Universal Value of the Landscape of Grand Pré.

This model:

- Has the greatest potential to move the project beyond a localized focus to the world stage;
- Defines ultimate responsibility and accountability;
- Offers a meaningful and appropriate role for all stakeholders;
- Supports three key elements (management, research, fundraising) independently, yet allows for a coordinated approach toward a common goal. It allows managers to manage, researchers to undertake research, and fundraisers to deliver and steward;
- Offers the best opportunities to attract and retain outstanding volunteer leadership;
- Invites strategic investment by any and all foreseeable partners, without limitation;
- Ensures public transparency and trust;
- Will result in the most new money raised.

The “centre” of activity, legally and practically, is a new corporate entity (which could be) entitled “The Landscape of Grand Pre Outstanding Universal Value Institute” (hereafter referred to as “the Institute”).

The Institute will focus much of its activities on research to enable a place for the Outstanding Universal Value (OUV) of the World Heritage Site on a national and international stage. It will enter into partnerships with universities, museums, research centres, and other institutions. It will foster the development of cultural programming regarding the outstanding universal value proposition through annual conferences and cultural events. It will be responsible for undertaking capital development projects. It will have a publication arm and serve as a catalyst and conduit for publishing and published research. Through a partnership with “the Foundation,” it will provide fundraisers essential priority direction, and will rely on the Stewardship Board and the Foundation to direct operations and external investment.

2.0 The Stewardship Board

As set out in the Terms of Reference developed by Nomination Grand Pré, the Stewardship Board will be responsible for the management, operations, protection, interpretation, and promotion of the World Heritage Site. The Stewardship Board will carry on these activities under the authority and resources granted to it by the Institute.

More specifically, the Stewardship Board will be in partnership with, and responsible to, the Institute’s Board of Directors, for:

- *managing* the operations and activities of the World Heritage Site;
- *coordinating* all participating regulatory authorities;
- *engaging* the stakeholders in the stewardship of the World Heritage Site;
- *consulting* with members on key issues;
- *promoting* the Outstanding Universal Value of the World Heritage Site;
- *fostering and facilitating* information-sharing for the benefit of the World Heritage Site;
- *reporting* on the condition of the property, including, as necessary, to the World Heritage Centre through the Canadian Delegation to the World Heritage Committee;
- *appointing, supervising and evaluating* a Site Management Coordinator; and,
- *obtaining* the support of relevant authorities to carry out its mandate.

The work of the Stewardship Board will be supported by two committees, the Technical Advisory Committee, and the Education and Marketing Committee.

The Technical Advisory Committee will provide advice regarding issues which could have an impact on the OUV of the World Heritage Site. Particular focus will be placed upon matters that protect the property's OUV, and on assistance with monitoring and reporting on the condition of the WHS.

The Education and Marketing Committee will provide advice regarding issues relating to promotion, interpretation, and education, as well as coordination of the development of products, activities and messages related to the World Heritage Site.

Special collaboration between the Stewardship Board and the cultural and research programming activities of the Institute will be necessary. The external relations focus of the Institute will further the objectives of the Stewardship Board, especially as it relates to interpretation and promotion. For example, the Stewardship Board could call upon the support of the Institute to develop special exhibits and programs regarding the World Heritage Site. Furthermore, as a legal entity whose sole purpose is supporting the World Heritage Site, the Institute will bring added value to the work of the Stewardship Board through its fundraising initiatives.

3.0 The Institute

In lieu of the existence of an existing legal entity to pursue the vision of UNESCO World Heritage designation, the authority inherent within the Steering Committee of Nomination Grand Pré will be the basis upon which the Institute is established. The initial appointment of three Directors to the (to-be-established) not-for-profit corporation will be undertaken through a process led by the Nomination Grand Pré Steering Committee.

The Institute will have a mandate, established in documents of incorporation, including a Constitution, By-laws, and Policies, that will outline what it can do and how it will function.

The Directors of the Institute will appoint a CEO and help develop a supportive administrative team to eventually include an executive administrative assistant, and other support as may be required in such a way as to complement the strengths of the CEO.

Included on the Institute Board of Directors will be a minimum of nine outstanding citizens who, together, will provide a balance of experience, skill and specific area of interest. These members should include one or more who is/are seen and respected as representative(s) of the Acadian community, one who is seen and respected as a local citizen, accomplished academic and business leaders, and those of international reputation, whose collective stature and commitment will guide governance of the highest standards.

The Institute will establish three committees to support and further its work.

The Cultural Research and Programming Committee is the international academic “think-tank” to guide inquiry into history, into significant scientific and sociological challenges that the site presents, and to offer special service to the agricultural interests inherent in preservation and development.

The Finance, Audit and Public Accountability Committee insures the implementation of such controls, checks and balances as are required by law, good governance, and principles of financial stewardship. This committee is responsible for the development of business plans, and financial reports, as well as contract/agreement approval. It is this committee that will be charged with revenue generation outside the major gift/capital campaign purview. The Finance Committee considers dues, fees, sponsorships, event revenue generation, sale of services, annual funds, planned giving programs, and any other revenue-generating aspect of the Institute strategic plan.

The Membership Committee will insure that revenue generation is an Institute priority to complement and supplement government grants and private fundraising. A variety of membership fees (institutions, organizations, corporate, individuals) will be critical to the sustainability of the Institute.

The Institute will receive, allocate and be accountable for all funding from all sources intended for Stewardship Board, Institute and/or Foundation work. The Institute will adopt and implement a business plan(s), create, request and receive appropriate financial reports, partner (through priority-setting) with the Foundation, and approve personnel appointments and service contracts and other forms of agreements.

4.0 The Foundation

It is anticipated that the Institute, through the Kings Regional Development Agency (KRDA) or pursuant to direction from trustees of a public trust, will receive start-up operating funding from the Province of Nova Scotia. It is further understood that these funds are intended to provide basic operational support for the organization that is established to carry out the work promised to UNESCO. It is assumed that these funds, to be allocated by government in a single “lump” sum, will provide some flexibility for the Institute to spend or invest in accordance with a ten-year (and beyond) sustainability strategic plan.

Red Letter believes that both the short term and the longer-term sustainability and growth of the Institute is inescapably linked to, and with, the establishment of an independent charitable foundation.

The Landscape of Grand Pré World Heritage Site Foundation, hereinafter referred to as “the Foundation,” will be established with a singular mandate to bring substantial operating, research and development, and capital resources to the Institute in accordance with direction provided by an Institute Priorities Committee.

Sustainability of the path toward achieving the goals and objectives of the Institute will depend primarily upon the committed philanthropic spirit of people who care, wherever in the world they are to be found. It is an imposing challenge to link \$10,000,000 in donor investments with the mission of The Landscape of Grand Pré .

In the current environment, we see no existing individual, organization, or structure capable of rising to, and accepting, this challenge.

There is an increasing worldly dependence on true philanthropy; there is also increasing acceptance that the public purse can only do so much and that it is the responsibility of every citizen of the earth to take part in its sustainability. These two philosophies are to be found united within the Landscape of Grand Pré Institute.

Why a separate charitable foundation?

- The stakes are very high; only the most organized, best prepared, best governed, best co-ordinated , and best planned fundraising can ever result in a goal of a minimum of \$10,000,000;
- There is no room for internal complication;
- It is the major gift fundraising “industry standard”;
- It places the Landscape of Grand Pré World Heritage Site on an “even plane” with many other charities undertaking major gift fundraising; experienced benchmarking can be employed;
- Directors are clear in their responsibilities and accountability. Terminology is understood;
- Goal-setting is clean;
- Expense transparencies – so very important in today’s environment – are clean;
- ROI can be measured;

- Directors can be expected to lead by example and are chosen with reference to same;
- Experienced fundraisers are the best persons to collectively judge the reasonableness of expectations.

The Foundation will seek charitable status and act in accordance with all applicable Canada Revenue Agency (CRA) regulations to develop sound fundraising strategies, delivery mechanisms, and stewardship and reporting programs.

The Trustees of the Foundation will be recruited through a compelling presentation and process that will attract those persons with demonstrated success and/or potential for outstanding fundraising (capital, operating, research, strategic partnerships) from the private sector.

The Foundation will, as expressed in its mission statement, constitution and by-laws, adhere to the highest possible procedural and ethical standards, strive to meet goals, and be open and accountable to donors and to all stakeholders, including the general public.

Why not utilize the Stewardship Board for fundraising?

Red Letter has examined the articles of agreement that created the Stewardship Board and has concluded that:

- a) A major internal or external fundraising focus for the Board was not anticipated;
- b) Its members have potential conflict of interest issues;
- c) The complexity of membership on the Stewardship Board (and the commitment to ex-officio members) would not offer the best immediate direction and response for effective high-level fundraising;
- d) The intent was to create a Board focused upon excellence in advising on, and carrying out, site management and promotion;
- e) The membership does not reflect the likelihood of any traditional model of top-down financial commitment.

Additionally, Red Letter examined:

- how a sub-committee of the Stewardship Board might function;
- some applicable aspects of Trust law;
- a committee structure that would report directly to the Institute Board of Directors;
- a potential partnership with the Wolfville and/or Nova Scotia Community Foundation;
- reliance on the use of internet partners such as Canada Helps for major gift fundraising.

Although Trust structures can be used for charitable purposes, Water's Law of Trusts, Canada's authoritative resource for trust law, focuses most of its common law, legislative enactments and practice on priorities of Trusts as privacy mechanisms, spendthrift causes, estate planning, pension

planning, asset protection and construction law. To enter the field of Trust law can greatly increase the complexity of corporate life.

Charitable foundations established in Canada under Provincial or Federal Law generally either donate and support another charitable organization or provide support for their own charitable cause.

Charitable foundations are relatively simple in requirements: a charitable purpose, confirmed economic activities, By-laws for management, and committed financial accountability. The Canada Revenue Agency can provide advantageous tax status.

We have examined the role of an independent charitable foundation and offer that model as the best opportunity for the Institute to be productive and competitive through an ability to:

- a) attract top fund-raisers as volunteers;
- b) raise the most money possible;
- c) interpret the priorities of the Institute to prospective donors;
- d) satisfy the donors of responsible use and accountability;
- e) implement flexibility with strategic partnerships; and,
- f) be in a position to utilize all aspects of fund-raising partnerships, from government to quasi-government institutions, individuals to private enterprise, web-sites to social networks.

An arms-length relationship with the Institute Directors offers the greatest opportunity for a system of checks and balances. Unbridled by the constraints of interest groups, of internal politics, of policy and priority discussion and possible confusion, and responsible to one another for success, the right leaders, working closely together, and supported by the Institute, will present the greatest potential for success.

The Grand Pré World Heritage Site Charitable Foundation would be established by professional counsel (time from filing to CRA decision is estimated to be six months) to: “. . . undertake any and all efforts to raise revenues that will eventually be transferred to the Grand Pré World Heritage Site Institute, in support of its not-for-profit work . . .” or such wording/focus as is required for approval by the Canada Revenue Agency.

The Foundation will be comprised of nine Directors, one of whom shall be designated Chair, and another Vice-Chair. The Chair of the Board of Directors of the Institute is to be an ex-officio full voting member of the Foundation. Both the Société Promotion Grand Pré and Société Nationale de l’Acadie would be specifically asked to nominate directors from among Acadians of national and international fundraising prominence for consideration as founding directors. The successful operation of the Board of the Foundation assumes that there is a substantial presence, at all times, of those who best understand and appreciate the history of the Acadian people.

(There is a “directors” fundraising principle to apply here as well: those who solicit major gifts should be

at or near the same socio-economic level as those from whom they will be soliciting gifts.)

The Institute will, at all times, ensure that adequate administrative services are made available to the Foundation including, but not limited to, data base management, secretarial and recording services, and stewardship.

The Foundation may strike agreements with volunteers, staffing and/or fundraising consultants as it sees fit, in order to achieve fundraising goals, but only if the Board of Directors of the Institute concurs and approves the commitment of the expenditure plans.

The Foundation will receive its fund-raising priorities and general assistance from a joint **Institute-Foundation Priorities Committee**. The Priorities Committee membership will be comprised of five representatives: two from the Board of the Institute, two from the Stewardship Board, and a fifth being the Chair of the Foundation. The CEO of the Institute will be ex-officio to this committee and will act as its secretary. The first task of this committee will be to develop a rolling five-year fund-raising priority chart to focus Foundation efforts.

It is expected that the Priorities Committee will strike the timely and reasonable balance among:

- operational requests from the Institute to supplement/complement Public Trust allocations;
- capital improvements;
- scholarship or bursary funding for Institute associates, students, “in-residence” or visiting scholars;
- funding for research priorities;
- special projects such as seminars;
- the pursuit of fundraising opportunities which may arise unexpectedly.

The Priorities Committee will play the central role in developing the fundraising plan and in determining Institute support for major gift fundraising.

5.0 Service Delivery

As outlined in the Strategic Plan for the Grand Pré and Area World Heritage Site Stewardship Board, management and protection services will be delivered through existing boards, bodies, and government authorities. These services will be supplemented by technical advice, interpretation, and education from the Grand Pré World Heritage Site Stewardship Board, and procedures developed to accommodate a designated World Heritage site.

The Institute will support the Stewardship Board with mutually agreed-upon resources, to enable its management and operations mandate. Central to this mandate will be to select those service delivery

organizations exhibiting a record of achieving results that can be measured in accordance with expectations. The process of awarding service delivery contracts and agreements will consider capacity building and will seek the involvement of appropriate community groups and individuals when making decisions about allocating resources related to the implementation of WHS objectives.

6.0 Next Steps

1. Adopt and refine the organizational structure.

2. Incorporate the Institute, with the help of professional counsel.

Red Letter recommends the incorporation of the Landscape of Grand Pré World Heritage Site Institute as a not-for-profit corporation. A not-for-profit corporation carries out activities without a purpose of gain for its members or directors. It is a legal entity separate from its members and directors. The corporation has provincial status with the typical advantages lying with its legal rights and responsibilities, prescribed limits to liability, continuity, property ownership issues and eligibility for certain government grant programs.

Many not-for-profit organizations focus on education (including research) and preservation of the environment, two key elements of UNESCO World Heritage Site designation, which may allow a seamless fit with pre-approved incorporation and CRA standards and objectives for not-for-profits.

3. Adopt the Institute Governance Model and develop by-laws accordingly.

Numerous examples of poor accountability, and worse, among not-for-profit organizations, have been reported in recent years and often have been attributed to failed governance. There is no single model that fits all governing challenges. “Mixing and matching” for the specific purposes of upholding organizational mission, and achieving goals and objectives, is common. There are, in fact, many general approaches to governance of not-for-profit organizations.

Eight have been identified in an excellent article by Mel Gill of Synergy Associates.

1. Operational – does the work of the organization
2. Collective – board and staff involved in single-team decision making and implementation
3. Management – board manages through coordinator
4. Constituent Representational – balancing of organization against interests of constituents
5. Traditional – Board governs through committee structure
6. Results-Based – sets direction, focuses on best results

7. Policy Governance – processes through policy; broad discretion to CEO
8. Advisory – dominated by CEO

Not-for-profits have evolved over time, generally from operational to traditional. Recent trends seem to be toward more results-based governance. Any of these might work for a small but mighty Institute such as we envision. However, it is also likely that as the Institute grows, the level of public interest grows accordingly, and the focus on best practice governance increases. Therefore, Red Letter recommends a results-based governance model.

Building the correct model for the Institute:

Regardless of structure, elements of trust, mutual respect, honest communications, and collaborative relationships are central to effective governance.

Every organization will have its own unique culture and set of circumstances. The challenge to building the best model lies in understanding the factors that need to be considered, and in being creative with constitution, by-laws and policy development. These factors include, but are not limited to:

- Size, complexity, and dreams, of the organization - generally the larger the organization, the greater need for a more complex governing model.
- “Ownership” of the assets - an Institute can be comprised of assets owned by others, by funders and/or sponsoring partners, or by external organizations or government. Each case calls for different accountabilities and communications strategies.

Structure, By-laws, Policies, and authority ought to be imbedded with freedom for the CEO to manage the Institute. Very early in its existence, these authorities need to be more closely checked and balanced with the directors than is likely to be the case as the Institute matures. It is probable that a fully mature Institute will reflect the creation and fulfillment of CEO vision, the personalities of its team, and performance results.

4. Fine tune the Mission of the Institute.

A suggested corporate Mission: “To undertake such activities as the Board of Directors identifies for research and partnership initiatives that show potential to add to the Outstanding Universal Value existing, and yet to be discovered, within and related to, the cultural and natural significance of the Grand Pré and Area “Nominated Property” as described on the World Heritage list.”

5. Appoint a CEO.

The job description, the required credentials of candidates, and the process of appointing a CEO all need to reflect a certain stature and ability of someone comfortable with working alongside, and leading,

world-class researchers and fund-raisers. The job description is the immediate first step and needs to reflect the magical combination of understanding the potential of the site, demonstrated management skill, respected academic achievement, appreciation for, and/or substantiated success in, attracting funding, an international network, an exciting vision and exceptional interpersonal skills.

6. Build a complete Institute Board.

The Institute will be comprised of a Board of Directors of a minimum of nine persons.

Suggestions have been made to draw locally and regionally on persons who reflect a presence of some, or all, of the following collective strengths:

- appreciation of the importance of Institute success
- ethnic and cultural diversity, gender, age balance
- business achievement, locally, regionally, nationally
- theoretical and applied research record of achievement
- governance experience
- post-secondary (or beyond) educational experience
- finance administration
- major gift fund-raising and stewardship
- Human Resource management
- government relations
- international partnerships
- understanding of local issues
- communications

The CEO of the Institute is to be an ex-officio member of the Institute Board.

The Institute Board will have an Executive Committee comprised of the Chair, the Vice-Chair, the Treasurer and the CEO as an ex-officio member. It will have the authority to act on behalf of the Board between meetings of the full Board.

7. Establish the Foundation.

Red Letter recommends that there be a parallel organization established called the Landscape of Grand Pré World Heritage Site Charitable Foundation. Red Letter further recommends that the present Steering Committee of Nomination Grand Pré bring together individuals who see value in the concept of said Foundation to begin, with legal advice, the steps to seek charitable status in accordance with Canada Revenue Agency (CRA) standards of eligibility for advantageous tax status.

The Foundation will be built entirely on the principles of excellence in fundraising:

- An organizational mission that is clearly understood, developed, and overseen by a focused Board of Directors following sound governance principles;
- A clear and compelling Case For Support based on researched objectives with measurable outcomes;
- A respected leader(s) supported by a wider core of informed and committed volunteers, each of whom makes a personal gift commitment;
- A realistic fundraising plan set within the current fundraising climate;
- A highly personalized cultivation and stewardship strategy;
- An organizational infrastructure sufficient to support volunteers;
- Long-term focus, discipline and patience.

8. Establish the Priorities Committee

Guiding fundraising priorities for the Foundation will be identified, and reviewed/renewed at least every two calendar years, by a joint standing committee made up of five members: two from the Board of the Institute, two from the Stewardship Board, and a fifth being the Chair of the Foundation. The CEO of the Institute will be an Ex-Officio, non-voting member, and will act as secretary to the Priorities Committee. This Priorities Committee will normally forward budgeted unrestricted support directly to the Institute and/or work with the Institute and Foundation on a long-term balanced expenditure/endowment strategy. The Priorities Committee is obliged, first and foremost, to act in accordance with donor restrictions / agreements as the Foundation informs.

9. Consider the most pressing of By-law Issues, such as:

The business and affairs of the Foundation will be conducted in accordance with a budget established by the Foundation and approved by the Institute, which budget may include investment from the Institute.

The Foundation will have no independent borrowing power without Foundation collateral unless said loan is co-signed by the Institute.

The Foundation will have a minimum of quarterly meetings at the location best suitable to members. At least one meeting a year will be held at Grand Pré.

The business of the Foundation will be conducted in accordance with accepted rules of order and procedures. Foundation members have a right to at least seven working days notice of meetings and full details of business to be conducted.

Director's terms will be five years, renewable. Initially, terms will be offered from one to five years to founding members in such a manner as to effect some annual turnover among members.

Directors will have the authority to appoint as many Honorary Directors (with rights and privileges that do not include voting on Foundation business) as they deem suitable for the work of the Foundation.

Directors will serve without remuneration for service. Reasonable expenses, approved in advance and directly related to Foundation work, may be reimbursed by the Foundation to those who serve it.

The Foundation will produce an Annual Report, to be made public to its constituencies.

The Foundation will undergo an independent annual audit carried out by the same auditing firm that audits the Institute.

The Foundation will not have the authority to seek donations and grants outside the priorities given it by the Priorities Committee, but will be given wide discretion to interpret same in order that any and all opportunities for advancement of the interests of the Institute can be pursued.

The Foundation will have the authority to hold property, receive government grants, receive partnership funding, and receive such other funds as donated to further the goals and objectives of the Foundation and the Institute.

In its formative years, the Foundation will focus its programming on a major gift and/or capital campaign undertaking. As the fundraising program matures, discussions between the Institute, the Stewardship Board and the Foundation may allocate other revenue-generating responsibilities to the Foundation. These activities may include but are not necessarily limited to, sponsorships, partnerships, in-kind opportunities, a planned giving program, events, memberships and annual fund.

The Foundation will develop, keep current, and implement, annual and five-year fundraising plans.

The Foundation will keep a current list of prominent persons who may be considered as directors in the event of a vacancy.

The Role of Provincial Funds

In November of 2011, the Province of Nova Scotia announced that it would establish a \$2.5M trust fund to help manage Grand Pré as a UNESCO World Heritage Site if the nomination is successful.

The fund, according to David Wilson, Minister of Communities, Culture and Heritage, will “...help operate the site, provide interpretation and heritage protection, and enhance promotion and research.”

The grant was announced as a one-time contribution intended to support management for a ten-year period. The Province stated that it will ensure that “... there are annual audits along with accountability measures.”

As this present report and recommendations are written, the precise details of this trust fund have not been released.

Red Letter sees opportunity to leverage this significant one-time investment by Government.

Consistent with all that has been publicly stated by Government representatives, opportunities present themselves to:

- administer these funds arms-length from the government;
- live up to trust obligations;
- place them within an entity designed to focus on priorities;
- emphasize transparency and accountability to the public for the use of its funds;
- leverage in such a way as to both increase investment and better assure long-term sustainability of the Institute.

Red Letter assessed the more obvious (Provincial) options:

1. The Provincial Government establishes a stand-alone Public Trust, with three of its own appointed Trustees, the Trust to have a 10-year existence, and to make annual allocations/disbursements out of the Trust to the entity responsible for operations;
2. The Provincial Government establishes the Trust and utilizes three members of the present Nomination Grand Pré Stewardship Board, as Trustees; (It should be noted that the particular words used at the public announcement of Provincial funding seem to make reference to a “Stewardship Board” that WILL BE established to receive allocations. Red Letter has interpreted this to anticipate that a governing structure not in place at that time, is to be in place before any allocation of funds).
3. The Provincial Government utilizes three Directors of the Institute as its Trustees, established under the recommendations contained herein;
4. The Provincial Government utilizes three Directors of the Charitable Foundation established under the recommendations contained herein;

Red Letter has assessed these four options and expresses its hope that the greatest leverage can be made of public investment to encourage continuing and growing private investment.

Option 1: A stand-alone public trust serves the purposes of transparency, accountability and assurance of a ten-year life, through the obligations in law of trusteeship. There are extra costs for administering a public trust; there are issues if Trustees resign, die or cannot function – the processes of government can take time to find replacements. Trustees, by their very nature, are “arms-length” and cannot be expected to carry the interest, passion and context of their Stewardship Board, Institute and Foundation counterparts.

Option 2: The appointment of three members of the present Stewardship Board as Trustees offers “hands-on” involvement of local citizens as arms-length Trustees. However, the present Stewardship Board is not recommended herein as the entity to allocate funds and set funding priorities. To place

substantial funds in the hands of an external group, made up of representatives of interest groups, would, in our opinion, not merge public funds with good governance practice.

Option 3: The appointment of three Directors of the Institute as Public Trust Trustees makes a lot of sense to Red Letter. We envision Directors of the Institute as exemplary regional, national and international persons of experience and influence. These are the type of persons that Provincial trusteeship needs as well. Persons of this stature often have served other trusteeship roles and know and understand principles of conflict of interest, if any should arise (Red Letter envisions none). One key question that Public Trustees will face is the proper balance between immediate “up-front” expenditures and endowment. Directors of the Institute are best positioned to understand this.

Option 4: Building upon the rationale of the preceding paragraph, Directors of the Foundation are trustees who are serving both public and private interests, are in the best position to understand the balance between immediate needs of the Institute and the opportunity to use commitments already made (such as those from the Province and the Municipality of Kings, and private donations) to leverage matching challenges, partnerships, or purely to build momentum which is a critical element of successful fundraising. Red letter envisions the same stature of individuals leading the charitable Foundation as are suggested for the Institute.

While the role of Trustees of the Provincial Public Trust could be very well-served (in our opinion) by either option 3 or 4, Red Letter sees a certain (and best) advantage to long-term fund-raising by utilizing option 4.

Other Present Funding Partners

Funding committed from the Municipality of Kings County does not necessarily follow the Provincial Public Trust needs and limitations. Red Letter recommends that this funding flow directly to The Institute to be allocated to highest priorities under the authority and direction of the Directors.

7.0 Looking Ahead

The Red Letter work plan, as approved by the Nomination Grand Pré Steering Committee, notes the following:

“The Nomination Grand Pré structural model should be comprehensive enough to adapt to changing circumstances and built in such a way as to invite and cement ownership of the financial health of the project, as widely and as jointly as possible, while at all times preserving clear and transparent accountability. This will become particularly important while developing the fundraising plan, to ensure that the engagement of volunteers will lead to sustainable leadership in the future.”

Red Letter believes the recommendations, as noted, achieve this goal.

Good governance evolves. It is routinely shaped by actions, attitudes and mutual respect of the people involved. Governance models are only as good as participant's commitment to the common good. Red Letter has found, throughout the research to date for this project, a remarkable mix of personal, organizational, and governmental reasons why the history, preservation, promotion and enrichment of Grand Pré and its immediate surroundings matter to citizens, not just locally, but of the world.

There is considerable good will, which can and will drive sustainability.

Red Letter has tried to listen carefully to as many key stakeholders as possible. Where we couldn't meet face to face, we read minutes of meetings and agreements, of plans, of different opinions, wherein many more stakeholders spoke and made commitments to the better good of the nominated area. Our team for this project worked countless hours seeking to fully understand all the perspectives of the various issues having a bearing on the project, in some cases meeting more than once or twice with key stakeholders.

In an organization, not everyone can hold controlling personal power. Excellence in governance (defined by accountability) requires that "the buck stop" with someone or some group. The Board of Directors of the Institute is this group and its CEO is that someone. Red Letter has attempted to be sensitive to issues brought to its attention and has tried to give key stakeholders appropriate key strategic roles. There is a fine line between advisory status and power; constructive advice and participation almost always results in an increased sharing of ultimate power.

Red Letter envisions the governance proposed for the Institute to be reflective of a promise of shared power which will then be empowered itself by shared responsibilities for setting the priorities and carrying out the difficult work of securing sustaining financial health for good management, sound preservation tactics, and enriching research and development.

There is time. Cutting the openings to this path began long ago and there is evidence that good governance has been considered essential, perhaps from the gestation of the idea to seek World Heritage Site designation. We inherited a lot of preparation.

Phase Two: The Fundraising Plan

Introduction

Phase one of Red Letter's work offered a governing structure for investments already committed, and to come, and for a perpetual enriching focus on the full story of three distinct peoples whose history is intertwined, one with the other, and who have all contributed to the shaping and evolution of the physical landscape called "Grand Pré."

Phase two of Red Letter work builds upon the recommended governance model, to inform and design a plan for sustainable funding.

There are 15 UNESCO sites in Canada. Our research has not found any comparable Canadian UNESCO World Heritage Site model that has:

- A integrated governance and fundraising model in use;
- Set a target of financial independence from government;
- Invested in fundraising infrastructure;
- Affiliated itself with a fully independent research institute.

This is not enough. We owe it to the investors to date to steward their investments of significant tangible confidence with the discipline to adopt and carry out a plan of leverage.

We are pleased to work with the Steering Committee to break new, and responsible, ground.

Caveat:

Fundraising success will not be without challenge.

As presented further in this report, every successful fundraising initiative begins with a clear organizational vision and mission, and a set of values which both devolve from, and are guided by, these statements. While these overriding guidelines exist for the Stewardship Board itself (reference January 2011 Strategic Plan), the plan we are proposing presents an opportunity to build upon initial thinking.

To reflect upon, and create a central vision, mission, and values of an Institute, primarily focused on pure and/or applied research, that owns the story that it is best suited to tell with clarity and passion, is an opportunity not to be overlooked. Before fundraising can deliver, the Institute will need to define itself.

We may find those of substantial means who understand the broadest of visions, who will invest in potential; there are also those who will require the narrowest of focus, with the promise of measurable deliverables. The latter is more often of late receiving the attention of larger donors.

Substantial discussions to define the Institute need to take place, among the most prominent of leaders, before large donations to the Institute can be identified and pursued. Red Letter recommends an immediate planning process begin (under the direction of a leadership team to be determined) for an externally funded symposium, to accomplish this objective.

John Ralston Saul is the type of keynote speaker and leader we envision to give the necessary impetus to this process.

After our consultations, with an understanding of the excitement the vision and mission of a new institute can foster, we believe that it offers the best chance for a complete stewardship of the landscape of Grand Pré.

Stewardship Board, Institute, Foundation

Three distinct structures combining resources:

By its very name and design, the “Stewardship Board” implies operational oversight.

The fundraising model is designed to integrate the Stewardship Board and its mandate (as an operations board, generating sustaining funding is – by itself – improbable) with the Institute and with the Foundation, making each reliant on the other. Donor attention and response therefore will be directed toward the excitement of vision and potential, not be tempted to focus on the past, nor on the maintenance, nor the promotion, nor the local or purely regional issues. To present operating and capital project needs without the supporting greater vision, would result in many a barrier, real and perceived, and would be challenged by the perception that others and other organizations (like governments and affected land owners) are in a better position to fund them.

This plan addresses the potential to leverage the start-up investment of the Province of Nova Scotia and the Municipality of the County of Kings, and of the widespread passion of people, and good supporting governance structure. We know, longer-term, that Foundation and other fundraising from the public must assume more and more of the operational costs of the Stewardship Board, as well as of the Institute; however, the initial one to three year funding plan cannot be built with a primary focus on operations. With support already committed, we must get the first three years right.

The Initial Stages:

From the Strategic Plan for the Grand Pré and Area World Heritage Site Stewardship Board (January, 2011):

“A first phase of capacity building begins in the first year and is expected to last three years. During that period the critical components of operations are put in place. Following that phase, a transition phase allows for the implementation of these components towards full operation in year seven.”

We have been retained to understand these critical components of operation and to develop a supporting fundraising plan. The initial three-year “development and capacity-building” period will likely require a minimum of \$500,000 in funding yet-to-be identified in order to successfully bridge into a phase 2 of “Transition.”

The activities of years one to three must move quickly beyond “exploratory” strategies.

To a huge extent, the successful execution of an initial three-year plan will determine fundraising opportunities and strategies beyond.

A model of Productivity and Sustainability

We predict that, after year ten of this plan, long-term sustainability of the Stewardship Board and the Institute (with an annual budget of circa \$500,000 plus) could be (and is likely to be) comprised of:

- 10% - Member fees (corporate/individual)
- 25-30% - Regular investment/contributions of individuals and charitable foundations, the product of Foundation work (eventually)
- 0-5% - Income from a growing endowment (the product of a planned giving program) – that part of which is not re-invested in the endowment
- 10% - Working corporate partnerships
- 10% - Unrestricted portion of periodic capital campaigns
- 5% - A cross-section of commercial and event revenue generating undertakings
- 10% - Research grant overhead
- 20% - Innovative government partnerships (secondments / joint initiatives / economic development)
- 5% - Other (for example: brand management)

The Stewardship Board and Institute represent the cost centres: the Foundation is designed to pay for its own operations.

1.0 Fundraising Principles and Planning Elements

As it will be in the case of the Landscape of Grand Pré UNESCO World Heritage Site, any fundraising success is generally directly dependent upon:

- A clear vision and mission statement, distinct from others;
- An articulation of immediate and longer-term goals;
- An impactful story told with passion;
- A cause that can be/is carefully interpreted through the eyes of donors;
- Knowing that friend-raising comes first; hearts and minds are opened before wallets; donors are developed, not born;
- Understanding that failure to plan is a plan to fail: there must be a strategy and plan, followed with a disciplined and systematic implementation of the plan;
- Extensive research;
- Knowing that people give to people, often beginning with their peers;
- Seeking investments, not gifts;
- Understanding the ask - You will not receive if you don't ask;
- Understanding that lead gifts come from leaders. Successful fundraising begins with personal donations, and are organized from the top down;
- Remembering that the focus is not about the money, it is about the work that needs to be done;
- Displaying patience - taking the time to be systematic;
- Stewarding - you cannot say thank-you too often;
- Understanding - even in the best of circumstances, people will do what they want to.

Fundraising planning elements that need to be in place:

- A strategic plan;
- Sound governance practices leading to clear transparency and accountability;
- A compelling Case for Support;
- Proof that the organization can and does deliver on its potential;
- Identified and specific priorities (consistent with the strategic plan);
- A sense of urgency;
- Respected leaders have been identified and enlisted;
- A data base of well-researched prospects;
- A pool of potential volunteers can be identified
- Some knowledge of a potential lead gift that amounts to 15-25% of the overall objective;
- A comprehensive stewardship plan;
- Board and staff understand, endorse and adhere to "the Donor Bill of Rights."

The Nomination Grand Pré UNESCO World Heritage Site proposal wisely identifies the time period of one to three years to organize into full campaign mode. The following principles apply to “campaign mode;” Red Letter would not expect all of these to dictate readiness to seek one to three-year start-up major gifts.

When the time comes:

Are you ready for a campaign? There are additional “readiness checklists”:

- The organization has a sustainable business plan within which campaign funds will fit;
- A professional fundraising feasibility study has been conducted;
- The organization has the necessary support resources in place;
- There is a communication plan;
- The role of government(s) is clear;
- Applicable donor policies have been crafted;
- The CEO/Executive Director and staff are committed to fundraising as an organizational priority;
- The Board is ready to make individual financial commitments toward the target and to take ownership for success;
- The top 100 donor prospects have been identified;
- Timing of the fundraising environment is not a significant negative issue.

Once campaign ready, there are many tasks to be considered:

- Creating timelines and setting benchmarks;
- Assigning responsibility for research and proposal-writing;
- Identification of, and recruitment of, the campaign or fundraising leader;
- Understanding expectations; clarifying commitments;
- In discussions with the “Chair,” identifying the need for professional help, if any: fundraising consultants, communications and materials consultants;
- Clarifying the role of the Board of Directors and of each individual member;
- Developing printed, video, and web materials to be used;
- Engaging, recruiting, and training additional/appropriate volunteer leadership;
- Confirming the financial gift commitments of the Board Chair and of the organization CEO;
- Soliciting all leaders for their personal gifts;
- Soliciting remainder of “family” gifts;
- Leveraging gifts committed into a plan for first tier prospects;
- Creating committees (major gifts, geographical, professional, cultural, affinity, socio-economic, phone-a-thon, direct mail, etc.)
- Implementing reporting, and the communications plan;
- When a minimum of 66% of goal is reached, planning the public launch.

2.0 Our Understanding of Funding Needs

The Landscape of Grand Pré World Heritage Site Stewardship Board Strategic Plan, dated January, 2011, articulates the applicable vision, mission, guiding principles and objectives of site management for a 10-year period post-successful inscription.

The plan states: “To carry out its mandate and reach its goals, the Stewardship Board will need to build its capacity with regards to communication, stakeholder engagement, interpretation, promotion, governance and sustainability of the governance structure through fundraising.”

The Strategic Plan suggests the following areas of funding need:

1. Protection*
2. Research*
3. Interpretation*
4. Promotion*
5. Stakeholder engagement*
6. Partnerships*

and

7. Reporting
8. Monitoring
9. Administration
10. Accountability

* possible positive fundraising messages that can support reporting, monitoring, administration and accountability costs.

And further, five key themes are identified with need to be adequately funded:

1. Protection: *appreciating the agricultural landscape*
(we would rate this as an “A” theme for Foundation fundraising)

- ensuring agriculture remains vibrant
- asset maintenance, e.g. dykes and aboiteaux
- memorializing the importance to Acadians
- filling the historical gap
- enabling the work of the Marsh Body
- sensitivity and balance within an active agricultural community

2. The “experience”: *a signature destination*
(an “A” theme for Foundation fundraising)

- awareness of landscape for many different communities
- promotion
- meeting UNESCO guidelines
- interpretation
- the achievement of the Acadian people
- partnership with existing World Heritage Sites

3. Strong stewardship: *developing community pride*
(best for Stewardship Board fundraising)

- community input
- community engagement
- reflection of community priorities through governance
- integration with school curriculum

4. Facilitating local economic opportunity: *through partnerships*
(an “A” theme for both Stewardship Board and Foundation fundraising)

- create gateways to cultural heritage
- provide a forum for economic discussion
- bring about opportunities to focus on agriculture
- be an active participant in economic development

5. Sustaining the funding: *funds beyond government*
(Strategies/ processes: to be supported by unrestricted operating funds)

- leveraging public funding
- developing a private fundraising strategy
- developing a governance model beyond ten years
- exploring all revenue streams

(NOTE: much of the above presents compelling, narrowly-focused fundraising opportunities to match up with donor interest such as: farmers and farm business with the physical landscape; tour providers with “the experience;” high tech industry with curriculum; local businesses with economic opportunity).

The strategic plan anticipates:

Year 1-3: explore fundraising strategies; identify resources; develop options for the long-term financial model; pursue government opportunities; cultivate opportunities to build fundraising relationships;

Year 4-6: implement fundraising strategy;

Year 7-10: carry out fundraising activities and implement the model.

3.0 Implementation and New Cost Implications

The governance model recommended in the first phase of the Red Letter report, where an Institute is created to lead research activity, will have a budgetary impact different from that envisioned by the Strategic Plan.

In addition to costs clearly anticipated by the Strategic Plan, the budget will need to reflect:

- Planning and communicating the unique vision, mission, and objectives of a new Institute – locally, regionally, world-wide;
- Three-pronged infrastructure that reflects the separation of management functions from research, and both from fundraising;
- A substantial investment in “development” that will assure long-term success in both operations and continuing capacity-building;
- The vision of a “home” for the Institute, whether physical or virtual.

A full and proper Institute business plan will need to be developed for the above.

For the purposes of focus on an initial 1-3 year fundraising plan, the following analysis is suggested (varying in allocation from the January 2011 Strategic Plan but consistent with overall projected expenditure levels).

Operational costs for the Landscape of Grand Pré World Heritage Site will be funded by an annual grant of \$250,000 from a trust fund created by the Province of Nova Scotia, and an annual grant of \$25,000 from the Municipality of Kings County. This promise of \$275,000 annually will be needed, and is intended, to meet some of the following three-year core operational needs:

- Salary, benefits (15%) support for an Institute CEO (also lead-researcher)	\$ 90,000
- Salary, benefits (15%) support for a (Stewardship Board) Site Manager	\$ 50,000
- Salary, benefits (15%) support for (Foundation) Chief Development Officer	\$ 70,000
- Salary, Benefits (15%) support for an Institute support administrator	\$ 40,000
- Tri-Board recruitment and stewardship	\$ 5,000
- Electronic infrastructure	\$ 5,000
- Basic Office rental space, supplies, infrastructure	\$ in-kind?
- Meeting and translation services	\$ in-kind?
- Finance, insurance, audit, reporting	\$ 5,000
- Promotion, materials, web administration and event fund	\$ 10,000
- Professional development	\$ 10,000
- Contingency/discretionary	<u>\$ 20,000</u>
Total	\$305,000

In the beginning, the investments in the CEO and Site Manager must drive allocation of available resources. Preparatory work for the arrival of a Chief Development Officer will be undertaken by the processes this plan puts in place and initial implementation of this fundraising plan can still be carried out.

This level of operation (and capacity-building) calls for an additional \$30,000 annually in the first three years. This amount is over and above our assumption that \$250,000 will be available from the Province and \$25,000 from the County/Municipality for each of these years.

Additional funds and/or in-kind gifts will likely be required to meet annual yearly inflationary / incremental costs in some of the above areas.

Initial one-time capacity-building investments required for Institute, Stewardship Board and Foundation include:

- Year 1: Not-for-profit incorporation of Institute and Foundation fees (\$10,000)
- Year 1: Professional communications counsel and materials (6 months; \$50,000)
- Years 1, 2: Professional fundraising counsel (18 months; \$180,000) plus expenses (\$20,000)
- Year 2: Interpretation study, surveys, site conservation, research investment ,etc. (\$170,000)
- Year 1: Institute-Defining Symposium (\$25,000)
- TBD: Space/home development (TBD)

Minimum total revenue generation required, years 1-3: \$1,370,000

From Province and Municipality:	\$825,000
Years 1-3 additional funds required to build capacity:	\$545,000

In addition, consideration needs to be given to:

Special Projects

It is anticipated that the Landscape of Grand Pré World Heritage Site Institute Board of Directors, in consultation with the Stewardship Board and the Board of the Foundation, will (early on) discuss a strategic capital and research plan that will offer opportunities for directed investment. These special projects must be undertaken to be at least cost-neutral to operating budgets; some will require contribution to Stewardship Board/Institute overhead. They must fit the business plan.

Research Partnership(s):

With the focus of the Institute clearly on research, an early (major) project partnership investment will be critical to the long-term fundraising capacity. Any research partnership(s) must be operating-budget neutral and/or contribute to general operating overhead. They must also fit the business plan.

4.0 Revenue Strategies for the Institute, Stewardship Board and Foundation

As pointed out in the January, 2011, strategic plan, there are many possible revenue streams for not-for-profit institutes in general. Those listed, and others, include:

- Membership fees (singular or shared with other Nova Scotia World Heritage Sites:). These can be individual, organizational, institutional or corporate;
- Government grants (emphasis on tourism);
- National and international charitable foundation grants (emphasis on human rights);
- Research grants: administrative overhead;
- In-kind secondments (e.g. Parks Canada), services, goods;

- Traditional private fundraising including: annual fund (“friends of”) and capital / major gift campaigns;
- Business and marketing sponsorships;
- Services: contract research; tours of sites;
- Events (annual dinner; golf tournament; auctions);
- Visitors fees (shared?);
- Museum/storefront sales;
- A planned giving program;
- Service club, organization partnership;
- Social networking – fundraising use of website linked to 250 other sites;
- Naming rights (building; home; web-site);
- Conference-hosting margins/fees;
- “Home”, “cottage” and “car” lotteries;
- TV telethons;
- Tourism commissions – agreements with service providers;
- “Forgivable” loans;
- Endowment investment income;
- Other opportunities related to “brand management”.

The Stewardship Board, the Institute, and the Foundation: WHO ASKS AND WHO IS ACCOUNTABLE?

It is important to assess:

1. Which of the three structures has the desire and competency to undertake what kind of and what amount of fundraising?
2. Which members of which Board (all volunteers) will accept that fundraising is a primary role and welcome it?
3. How can fundraising be carried out most effectively and efficiently?
4. Who will accept ultimate accountability?

All persons involved with any or all of the three governing structures must have a stake in success. It would be less than wise to set up a structure of inter-reliance built on the assumption that only one has the total responsibility for the financial health of the organization. Modern not-for-profit governance volunteerism brings with it ownership of the financial stability of the organization.

All revenue-generating possibilities should be organized into three areas of fundraising responsibilities, each with targets and a plan, with all activities coordinated through the CEO of the Institute.

The Institute: (start-up)

- Local, Provincial, Federal Government grants (beginning in Year 1)
- Membership fees (Year 2)
- Website options (Year 2)
- Research grants (Year 3)
- Contract services (Year 3)
- Conference-hosting (Year 3)
- Brand management (Year 3)

The Stewardship Board: (activities and revenues often to be shared with partners)

- In-kind gifts; government secondments; KRDA partnerships (Year 1)
- Société Nomination Grand Pré and Community Association partnership activities (Year 1)
- Business and marketing sponsorships & partnerships (Year 2)
- Tours and tourism (tbd)
- Annual event(s) (Year 2)
- Service Club partnerships (Year 2)
- Lotteries/on-line auctions/Eastlink telethons

The Foundation:

- Major Gifts Program – individuals, foundations, corporations (Year 1)
- Capital Campaign (Year 3)
- Planned Giving (Year 3)
- Institute Naming Rights (TBD)
- Endowment Investment & Income (TBD)

5.0 The Fundraising Plan: Initial Recommendations and Timelines

Initial and immediate fundraising steps:

- Confirm a governance structure;
- Seek out and hire the CEO of the Institute
- Adopt/adapt a fundraising plan in support of the confirmed structure;
- Re-visit the vision, mission statement and strategic plan;
- Seek counsel and initiate process to establish the Institute and the charitable foundation with CRA approval;
- Develop the July 15, 2012 - March 31, 2013 operating budget;
- Seek professional communications help.

Undertake initial core fundraising activities to begin short-term search for funding 3-year operational needs totaling a minimum of \$500,000 using these activities to develop strategies for a much broader capital campaign.

Some of these specific short-term fundraising activities can begin immediately and should include:

1. Determining the immediate role, if any, of additional government funding;
2. Seeking start-up financial contributions from members of the Stewardship Board, Steering Committee and Fundraising Advisory Committee;
3. Beginning recruitment of the best 15-20 Board members for the Institute and the Foundation, seeking “founding” unrestricted investments from each;
4. Developing a prospect identification strategy;
5. Identifying “secondment” or other in-kind (personnel) opportunities;
6. Researching, and approaching selected donor prospects; Red Letter has already undertaken the first steps in this area. (For example, it has come to our attention that many famous people have some Acadian heritage – Madonna, Lisa Marie Presley, Jean Beliveau, Beyoncé – perhaps these names can be leveraged).
7. Discussing possibilities of a “founding” research program partner;
8. Finding a niche for a major annual fundraising event.

The following Red Letter recommendations are based upon conclusions driven primarily by:

- Our understanding of the existing strategic plan;
- Extensive interaction with two or three persons who have been at the centre of this project for years;
- Input and support from the Steering Committee;
- Several group discussions;
- A series of interviews with selected experts and opinion leaders;
- Our experience with matching donors with causes on the regional and national scene;
- The current fundraising environment.

Our interviews and research can be summarized in the following observations that will guide the development of fundraising strategies:

Factors to Consider in a Fundraising Case for Support:

- A. The story of “Grand Pré” is not known particularly well beyond its shores (except by important regional; and international pockets of Acadian peoples and ancestors).
- B. Other associations and groups, and researchers, claim the “obvious” Acadian, Planters and First Nations territories.
- C. There is a lot of focused and detailed work to be done to get away from the general belief that a) the only story is the Expulsion and b) Parks Canada already is responsible for whatever funding is needed.
- D. The role of the Mi’kmaq is relatively unappreciated and unknown and needs to be placed rightly as one of the three “legs” supporting the story.
- E. The potential of a focused and fully-integrated research mission among the many stakeholders, and the variety of issues that make up the story, is exciting; the elements of the story – if presented in isolation – will be a hard sell (mainly because others are seen to do it well already). It is necessary to focus on the uniqueness of the complete and balanced story and to enrich it in a new and creative way.
- F. Despite the popularity of the environmental theme generally, the active presence of many organizations in this sector makes “physical site management and preservation” less attractive to potential funders. Climatology and the specifics of flood control might resonate.
- G. Funding for the promotion and preservation of human rights is generally well-supported fundraising opportunity.
- H. Agricultural conservation, preservation and development are seen to be primarily private ownership and/or government issues.
- I. The “reconciliation” theme will be a tough sell – few accept it as over; most see it as an on-going struggle.

- J. In partnership, the First Nations, (and especially) Acadians, Planters and present residents have expertise of offer to current pressing world issues such as wetlands and levee recoveries and rebuilds.

Strategic Factors:

Funding for operating endowments once was a realistic objective but not as much today. Donors don't want to fund safety nets, and returns are less than significant.

Donors are moving more and more toward restricted gifts and continuing personal involvement along with them; unrestricted gifts (that can be used for general operating purposes) will be hard to come by until there is a proven track record. Fundraising potential can only be accurately gauged in accordance with precise objectives.

As a start-up organization, the Institute will need to find a lead donor with significant stature and credibility.

Revenues generated by a variety of regular activities by the Stewardship Board, the Foundation and of the Institute likely must fill operating gaps.

The beyond-Canada-borders' international fundraising potential brought about solely by UNESCO designation is largely unknown in Canada.

Other Canadian UNESCO World Heritage Sites are primarily related to the National Park system and/or national/provincial historic sites and do not seem to be undertaking independent fundraising from the private sector.

There are numerous UNESCO World Heritage Site-related Institutes: they are mainly linked to a University and undertaking fund-raising under the purview of the partner University.

We discovered academic opinion for a new and independent interdisciplinary institute. One proposal focuses on an Institute of "Lieux de Memoire," or "Sites of Memories" dedicated to the study of historical memory. Another would stress human development; a third would apply historical inquiry and research to help Louisiana citizens cope with the disaster of the Gulf oil spill.

Steering Committee Leadership Initiatives:

It is our opinion that the Steering Committee must take the initiative and accept full ownership of the steps ahead. The Steering Committee should consider itself as the immediate interim Board of Directors of the Institute, with the fundraising sub-committee assuming interim status as proposed Directors of the Charitable Foundation (for submission to CRA).

Timeline Guidelines

May 15 - June 15

Upon the receipt of this Red Letter report, the fundraising sub-committee of the Steering Committee, and the Steering Committee itself, will have a road-map to prepare for July 15.

In anticipation of a positive response from UNESCO, the fundraising sub-committee should immediately adopt/adapt the governance and fundraising plans and present them, endorsed, to the Steering Committee and to KRDA.

The governance model should be specifically endorsed by the Steering Committee and presented to the Province so as to encourage confidence and flexibility with the 10-year \$2.5M fund. The fundraising plan should be made available as a supporting document that will always be evolving as a “work in progress.”

The Steering Committee should begin to drafting a job description and adapting a process to identify and hire a CEO for the Institute.

The Steering Committee should commit to a “final” 2012-2013 operating budget(s) so that short-term fundraising targets can be implied and framed. KRDA and Parks Canada should be involved to determine initial 3-year in-kind infrastructure and personnel secondment opportunities, if any.

Consideration should be given to process and to timing to identify communications and fundraising consultants for support with the implementation of part (or all) of the strategic and fundraising plans; possible funding avenues for these professional services should be examined.

Consultation should take place with the Société Promotion Grand Pré and Société Nationale de l'Acadie. Both of these organizations need to be respected for commitment and capacity to strengthen the core team. Plans that build upon the Stewardship Board commitments already in place need to be drawn up to integrate the objectives of the Société Promotion Grand Pré and SNA into the work of the Institute in order that these vital partners can contribute consistent with their missions and the larger mandate of the Institute.

The specifics of governance and the generality of fundraising plans, as adapted, should be made public.

Candidates should be discussed for volunteer positions as Directors of the Institute and Foundation to eventually replace (supplement) the interim slate of Directors of both.

When the CEO is in place, the process of identifying and hiring a “Site Manager” should be discussed with the Stewardship Board.

As part of any good fundraising plan, the role of government is crucial. This report offers no insight into Federal and Provincial government programs; that is not an expertise of Red Letter. Having declared the above, Red Letter has tried to present analysis and plans in accordance with public and private goals. There is a wealth of pent-up enthusiasm within communities for volunteerism of some type. Red Letter has presented these proposals with a view to sustainability, innovation, productivity, public accountability and leverage. These objectives should resonate with government as it seeks successful models for its future investments. It seems to us that sustaining government involvement can best be researched and pursued by a Government Relations sub-committee of the present Stewardship Board and that said committee should be established immediately.

(Note: Re: continuing support from the Province of Nova Scotia. The initiative should be taken by the Steering Committee, to discuss with the Province the opportunity that three (and possibly four) UNESCO World Heritage Sites within one Province, and so closely situated, presents. Only Manitoba and Alberta can match this within wide, wide Provincial boundaries. It is the opinion of Red Letter that the world significance of this UNESCO Site might be most effectively supplemented and/or complemented by a unified approach from the three sites extolling the uniqueness of such a small geographical area having three designated sites. Tourism Nova Scotia, for example, must take note of the fact that the three sites are within two driving hours of each other, which leads us to ask if there is another central location similar in the world? A combined marketing initiative could provide core funding for all three sites and build the capacities of each).

June 15 - July 15

The Steering Committee will draw up a preliminary general mission statement for the Institute and for the Foundation as these will be needed to move forward and the expected time for approval can be up to six months.

The Steering Committee should immediately discuss:

- a) a process to identify possible directors for the Institute and the Foundation;
- b) a process to plan for an Institute-defining symposium
- c) post-July 15th operations headquarters and continuing KRDA infrastructure support;

With Steering Committee authorization, a professional should be retained to immediately apply for Institute and Foundation charitable status – advice on framing the mission statements for CRA approval will be helpful. The Institute should be the lead but planning for the charitable foundation to support the Institute can be mapped out at the same time.

The Steering Committee should retain professional help to prepare communications materials for July 15 distribution. The same help should be retained to plan an announcement and celebration event.

The Steering Committee should retain professional help to write a (circa) \$500,000 3-year CASE for support for “internal” use (staff, Directors, Volunteer leaders, locals, “low-hanging fruit”); suggested target: \$100,000 over 5 years.

The Stewardship Board should seek out “in-kind opportunities for:

- possible longer-term secondments as site manager; as CEO of the Institute;
- summer research associates
- contributions to operations/capacity-building
- strategic partnerships.

The interim Directors of the Institute should decide on the potential partners to be approached to discuss the permanent creation/focus/infrastructure requirements of the Institute.

A short-term communications plan should be drawn up (with fundraising in mind). This plan would address celebration and readiness through:

- News/media releases
- Database development
- VIP guest lists for celebratory events
- Up-dating of website
- Logo design
- Communication with other UNESCO sites

The Board of the Foundation should be expanded in order for more persons to be brought into prospect ID and review. Those known should be approached as to their willingness to lead a \$500,000 short-term campaign.

There is need for planning now for post-inscription, July 15

As soon as possible:

The network for a public media release – and the release itself - can be prepared. The web-site enhancement can be planned;

A (cultivation) celebratory event should be undertaken at Grand Pré, perhaps on the view-plane.

6.0 Essential Infrastructure Requirements

Effective fundraising requires an investment. Generally speaking, the type and amount of up-front investment determines the quality of the product and eventually the outcome.

The Institute cannot raise sufficient funds alone. It needs the ongoing commitment of volunteers and friends, and of a supporting network of those who care. Volunteers should not be recruited or enlisted until sufficient support is in place.

There is always a degree of risk in investing up-front in fundraising:

- There is a fear of the unknown;
- The best people/good consultants are expensive;
- Cash flow can be an issue: gifts are often in the form of part cash/part pledge over time;
- Even the best proposals and strategies are successful at a rate of one to three or four;
- The right volunteer leadership is crucial to success.

The Institute, Stewardship Board, and the Foundation will require short and long-term lofty private sector goals.

Critical financial investments for substantial goals:

- An Executive Director of the Institute who can tell the story;
- An accomplished second-in-command Development Officer;
- Research strength;
- Back office help/volunteer support;
- A user-friendly data base and supporting computer systems;
- Materials;
- Communications and Fundraising professional counsel;
- A travel budget;
- A stewardship budget.

Often the right governing boards can generate a significant portion of the incremental costs of campaigning through personal gifts and/or close corporate/foundation connections. Governing boards of the 21st century not-for-profits are rapidly moving toward “ownership” of the financial health of the organization. Red Letter advises that the above be kept squarely in mind as the appropriate boards are being developed.

Costs of fundraising are most often met by:

- a start up gift (or gifts, including Board commitments)
- a portion from ongoing operating budget commitments
- a portion as a charge against endowments (if in existence)
- a portion as a first charge against campaign unrestricted gifts
- a portion coming from a percentage charged to each gift.

It is a reasonable expectation to budget between 5% and 25% of the total campaign objective for fundraising costs (if full supporting infrastructure has been, and is, in place). The smaller the goal, the larger the percentage will likely be.

7.0 Summary: 1-3 year plan

The following key steps are recommended to implement a successful fundraising plan for the Landscape of Grand Pré World Heritage Site:

1. Define, review and/or confirm vision, mission and fundraising roles of Stewardship Board (operations), Institute (research), Foundation (major gifts).
2. Put people and budget in place.
3. Plan an institute-defining symposium.
4. Recruit “founding” Directors of the Institute and the Foundation.
5. Identify further role, if any, of government.
6. Undertake short-term focus on finding \$500,000 from the private sector to support capacity-building investments.

Assumptions

- A critical funding need will be met through a founding/lead corporate sponsor wishing to identify with, benefit from association with, or undertake a specific task with, the Institute.
- A major research partnership will drive spin-offs.
- There will be significant overhead research grant contributions.
- Individuals will surface who will join the Institute and lead by fundraising by example.

- A growing number of corporations, foundations and professional organizations will purchase Institute memberships.
- The government will see wisdom and economic impact in funding a Nova Scotia tri-World Heritage Site initiative to promote the “experience.”
- There will be a continuing strong bond among the stakeholders toward a common strategy to support activities.
- An annual revenue stream from “for-profit” fund-raising activities and contract services will provide support that the Foundation cannot. The government will provide one-third (much of it through secondments and in-kind contributions) tied to economic development and the farming sector.
- People give to peers. Only the most respected and capable fundraisers and donors should be considered for Foundation trusteeship.
- Though starting out relying upon the infrastructure of the Institute for administrative assistance, through its extensive contacts the Foundation will soon pay for its own operating costs, contribute to the operations of the Stewardship Board, and overtime build an endowment.
- The precise major gift and campaign fundraising expectations – and any benchmarking - are fully dependent upon the clarity of vision, the early and lasting delivery of mission-related services and communication of the successes of the Institute.

8.0 Observations, Prospects and Analysis

The Origins of an Institute

Wikipedia tells us that “institute” comes from the Latin “institutum,” (meaning facility, or habit) and “instituire,” (meaning build, create, raise, educate). Furthermore, Wikipedia cautions that “institute” can mean different things in different countries. Common themes are education and research of the highest order and this is what is proposed for the Landscape of Grand Pré as a World Heritage Site.

Throughout Red Letter interviews concerning funding prospects, a repeated sense of direction came through (that had been, perhaps, best expressed by another source):

“Strategic Recommendations for Promoting and Fundraising for World Heritage” by Charles de Haes (Special Adviser to Director General of UNESCO) and David Mitchell, October, 1994.

Paraphrased:

“..As more definitive conservation, education, research and development objectives are articulated, priorities are set, and publicized, opportunities will arise; furthermore, the potential for support is directly proportionate to support of activities in pursuit of these priorities and results achieved (as well as failures) are reported on in a transparent, credible and easily comprehensible form.”

Red Letter applied the core elements identified for the proposed Institute: education, research, and community engagement, to six different central fundraising themes of Canadian charitable foundations and corporations: (figures in brackets are search engine hits from Canadian Centre for Philanthropy Directory of Foundations alone)

- a) Environment and conservation (3433)
- b) Agriculture (29)
- c) History of Peoples; culture, human rights and reconciliation. (163)
- d) Economic Development
- e) Outstanding Universal Value
- f) Education (478)

Amidst the very crowded fundraising sectors of each of the above, three “stand-alone” themes for the mission of a new Institute arose:

- a) As expressed by Minja Yang, President of Raymond Lemaire International Centre for Conservation (Katholieke Universiteit Leuven, Netherlands), March 1, 2012:

“With the global population projected to more than double the figure that it was in 1972 of 3.8 billion to 7.7 billion people in 2022 (ten years from the founding of the Institute), the next ten years will bear ever greater pressures upon the world’s finite resources. More than ever before, research on sustainability, including knowledge of past techniques on the use of land and other natural resources, as well as of our human settlements depicted through the World Heritage sites, will become relevant in guiding the future.”

- b) From Dr, John Reid, Professor of Canadian Studies, St. Mary’s University (April 19, 2012), an “Institute Lieux de Mémoire:”

“One of the most vibrant fields of historical enquiry in 2012 is the study of Historical Memory. All human beings are influenced by Historical Memory which consists of what they carry in their minds regarding the past – their own past, and other people’s pasts. Historical Memory differs from History. The discipline of History is the focused study of the past through the use of evidence and interpretation according to strict methodological principles. Historical Memory is how we (meaning all human beings in our diverse ways) chose to remember the past.”

c) Building upon a theme discussed with Warren Perrin: there is enormous unexploited knowledge and examples of the ingenuity of the Mi'Kmaq and Acadian peoples in climate prediction and adjustment, protection of arable and reclaimed lands through dykes and the aboiteaux, that seems to reach out to the enormous challenges of the coastal zones of Louisiana.

These “stand-alone” foci could be built upon each of the six fundraising hot-buttons:

Fundraising on Themes:

Red Letter has assessed the themes as identifiable parts of the central core of a World Heritage site fundraising plan, and begun prospect identification* based on same:

* prospects known to have personal connections to the area, who have been past donors to local/similar causes, who have been identified by search engines, who might see economic interest, who might form partnerships in research and education, and/or about whom Red Letter may have reason to believe could be approached. These have not been researched with the vision of the Institute in mind.

a. *The Environment and Land Conservation*

It's hard to imagine more competition (and more opportunity perhaps) than environmental causes bring. Environmental donations strongly follow larger and larger health issues, development agendas, public land, threatened species, water and air pollution and other cleanliness issues. The OUV of the Landscape of Grand Pré World Heritage Site does not fit conveniently into any strong single category.

Compromised by the extent of private land ownership coupled with existing agricultural production, with Parks Canada custodial care of the core, there is not a strong case for land conservation. In fact, we found a general level of disinterest in Grand Pré land conservation. Compared to the acreage of many other World Heritage sites, the preservation of/protection of land issue seems to be minimal except to very localized self-interest.

A substantial capital campaign to operate and endow Grand Pré as a World Heritage site, based on conservation, environmental issues, would have a difficult time without expert identification of modeling issues.

b. *Agriculture*

Red Letter has interviewed a number of Annapolis Valley farmers and businesses within the past year concerning the issue of protection of agricultural activities and use of land, through land trusts. Red Letter found no consensus on the urgency of agricultural land-use protection in general. There may be a case for support for very particular pieces of land in the minds of some of the farming/business community in and around Grand Pré – Red Letter did not pursue this narrow issue.

In the minds of the public, conservation and land preservation issues are mixed and are already the purview of The Nova Scotia Land Trust and The Nature Conservancy organizations (as well as others). The case for research into Grand Pré agriculture past, present and future, is a matter for experts examining issues within the Bay and coastal zone lands that are models for issues around the world. There may be modest, but localized, economic impact issues with agricultural issues. This is not a strong fundraising theme.

c. *History of Peoples, Culture, Human Rights, Reconciliation*

Red Letter found no consensus on the issue of reconciliation, testing it with each interview. As a fundraising theme, it would be difficult to pursue with a limited audience. No so for the issue of human rights and the recognition that First Nations, Acadians and Planters have quite different but identifiable places to play in world history. We found interest in the whole story, intertwined, but a constant difficulty in extracting the overriding focus that automatically goes to the Expulsion. We may encounter some pockets of resentment that somehow the larger story of the Landscape dilutes the importance of the Expulsion but we have identified that the vast majority see advantages and opportunities in an attempt to tell the full story. We found that, among those interviewed outside Nova Scotia, there was a consensus that Grand Pré was not as important as other aspects of Acadian history might be to them.

It was suggested that we research examples of the persecution of peoples now and then around the world and challenged to see parallels that can be used in the vigilant search for justice throughout the world.

Red Letter did not interview representatives of the First Nations but were repeatedly told that there was a) probably little interest by and among those who focus on First Nations history throughout North America and b) little if any interest shown by the local (Glooscap) First Nation, in the process of designation thus far.

Red Letter senses there is an important element of the Landscape story to be told by/about First Nations but that it will take an expert research approach to extract the story and make it relevant for fundraising.

d. *Economic Development*

Most charities indirectly support economic development. The charitable sector employs more than 34,000 people in Nova Scotia alone. The majority of World Heritage sites examined mentioned economic development as a key element of their management plans. A fully-developed and mature Institute located in or around Grand Pré would drive substantial economic activities. A vision is needed beyond the local corner businesses, innkeepers and Tourism Nova Scotia. This vision, as a fundraising tool, could attract partners and investors from within the wine industries in particular.

e. *Outstanding Universal Value*

Red Letter has conducted some research into the intrinsic attraction and fundraising potential of the singular fact of being designated a “World Heritage site” with maintaining and enriching “outstanding universal value” as the core message.

Many of the World Heritage sites that have their management plans on line seem to position revenue generation as heavily reliant upon the branding, or protection/employment of the “logo,” or “emblem” through a marketing plan.

We discovered an interesting article by cultural, heritage, and environment consultant James Rebanks, (“Economic Impact of World Heritage Sites”) that concluded (in part) that benefits of designation are not automatic but need to be built upon by public relations and marketing initiatives, international tourism initiatives (taking advantage of new technologies), by interesting and involving world corporations and attracting high-spending visitors. He points out that the intrinsic expectations from designation include:

- a great groundswell of public attention
- a unifying local and regional brand identity
- development and marketing of new knowledge and the cultural narrative
- civic pride
- a new tourist experience

f. *Education*

Another crowded philanthropic sector is education. It also offers the strongest component of the overall Grand Pré fundraising message. The closest model Red Letter could find to the proposed “Landscape Grand Pré World Heritage Site Institute” is The Blue Mountains World Heritage Institute, established in 2004 in Australia and affiliated with several post-secondary and government institutions. Its core is education and research as an independent forum.

Any successful fundraising model over time is likely to be built top-down on educational foundations.

The partners affiliated with the Institute (universities, colleges, students, research institutes, libraries, professional organizations) will offer many, many opportunities for funding.

Phase Two Fundraising Summary:

We feel quite confident with our governance and fundraising plans.

Red Letter's professional opinion is that there is sufficient potential to craft a unique and compelling vision of public impact that the Landscape of Grand Pré World Heritage Site Institute could have to encourage a two-step process.

Step One: a \$500,000 (minimum) major gifts campaign to secure necessary investments in one-time start-up costs that will lead to long-term stability.

Step Two: As this short-term project tests the Institute's general leadership and potential within the charitable sector, strategic planning for the longer-term will align itself with the vision, mission, objectives and activities of the yet-to-be focused Institute.

Thank you for the opportunity to work with such exciting ideas.

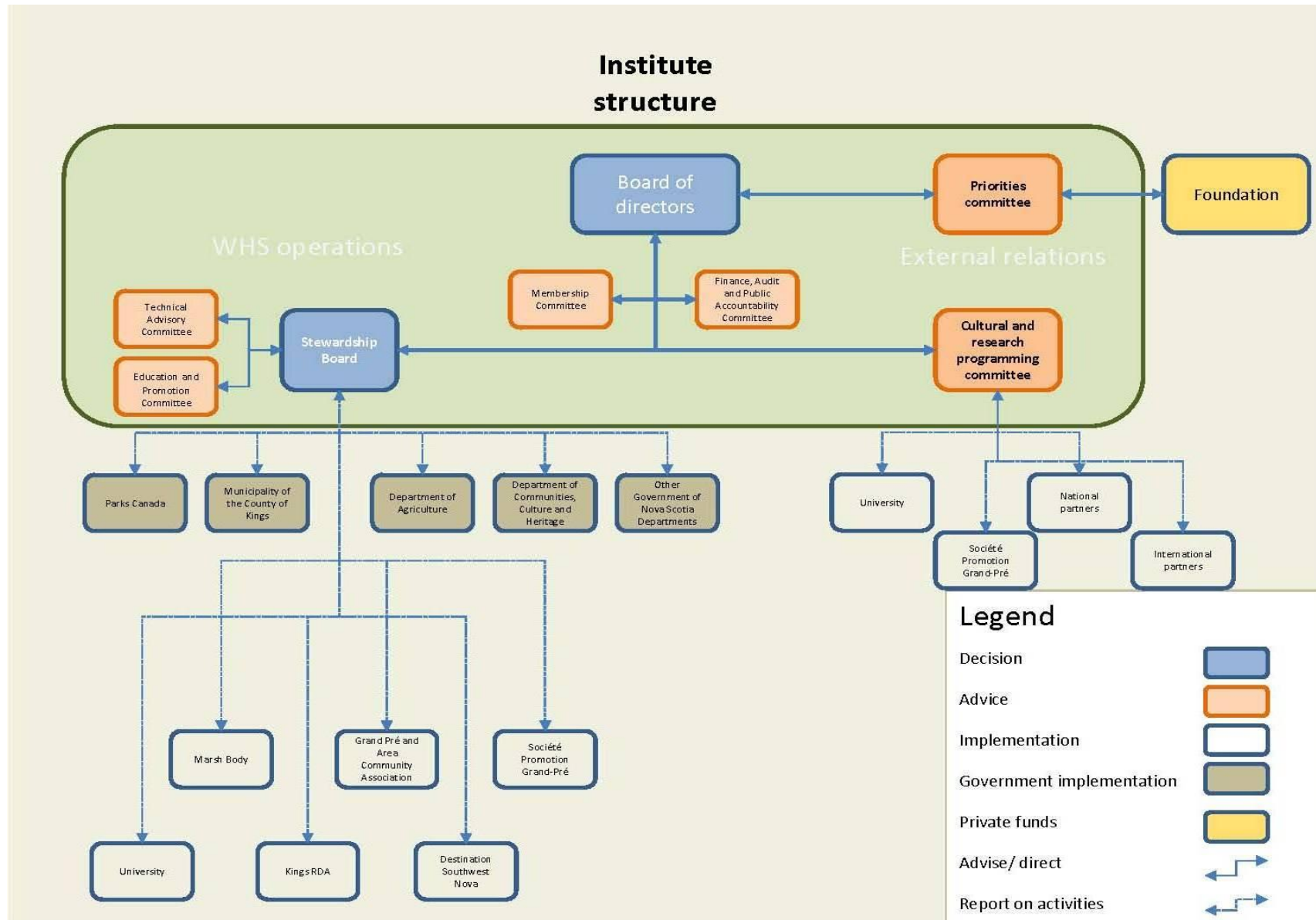
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Appendices:

Organization Chart – Detailed



Organization Chart – Simplified

