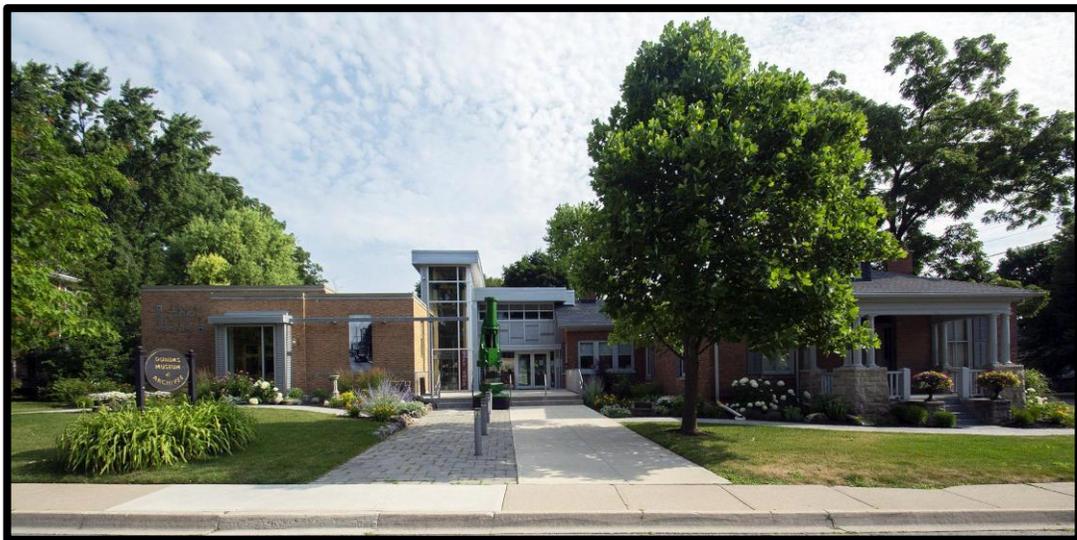




Creative Spaces Case Study Series

Dundas Museum and Archives



This Creative Spaces Case Study Series is supported by:



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Introduction

These in-depth case studies will serve as a resource for arts and heritage organizations embarking on a capital project to learn from the successes and challenges of others in the sector.

In these case studies, we will be analyzing the **why** (why they took on this capital project), the **what** (what were they building and creating), the **who** (who are they serving, who supported this project, who led this project and who they hired), the **how** (how was the project financially supported and what positions were created/how were they funded), and **the ongoing** (what happened after? How is the building maintained/operated? Is it sustainable? How is revenue generated?) behind each project.

We have engaged a wide range of spaces from across the province from varying operational models, size, location, project size and artistic discipline. The case studies will focus on each organization's respective process for completing each project; from the planning phase, to the building phase, to the operations and maintenance phase. Following the completion of all 20 case studies, a Best Practice Summary will be developed and released on ABO's website, free for all to access.

The case study series is supported by the Learning Series, which is a collection of webinars and workshops that support ABO's core programs. Webinars that highlight the capital projects featured in this case studies series will be made available throughout 2018 – 2020. Please check www.artsbuildontario.ca/learningseries for upcoming dates.

The case study series is supported by the Department of Canadian Heritage and Canada Council for the Arts.

ArtsBuild Ontario

ArtsBuild Ontario is the only organization in Ontario dedicated to realizing long-term solutions to building, managing and financing the sustainable arts facilities needed in our communities.

ABO offers tools, resources and programs that support arts organizations with their creative space projects. ABO's core programs include Accessibility in Creative Spaces, SpaceFinder in Canada, Arts Facilities Mentoring Network, and Asset Planner for the Arts.

Dundas Museum & Archives

Interviewees

Kevin Puddister, Curator & General Manager

Clare Crozer, Board Chair and President at time of the project

Bill Stewart, Building Committee Member

Ron Simpson, Board Treasurer at time of the project

Keith Green, Board member and Chair of the Property Committee

Drew Hauser, Lead Architect, McCallum Sather Architects

Mission Statement

The mission of the Dundas Museum and Archives is to act as stewards of the community's heritage as represented by the objects and archival material entrusted to us. We make this history available through our accessible exhibitions, education programming, research facilities, an online presence and the support of community initiatives.

Vision Statement

A welcoming space where the community engages with Dundas' past.

Values Statement

The Dundas Museum and Archives is passionate about the community of Dundas, and committed to these values:

- Ensure our actions are environmentally sustainable.
- Pursue excellence through continuous learning.
- Maintain and enhance an open, accessible and inclusive environment.
- Embrace our responsibility as stewards of the community's history.
- Present innovative exhibitions and programs.

Historical Background

In the mid-twentieth century, the town's residents realized they needed to save their heritage. The historical research of local reporters prompted the following headline in the March 13th, 1941 Dundas Star: "Suggest Local Museum to Safeguard Records." Around this idea, a diverse band of citizens began to gather. They initiated the writing of the town's history, began to gather historical records, and founded the Dundas Historical Society in 1945.

Two of the most dedicated collectors were Henry and H. Graham Bertram, a father and son duo of industrial magnates. Their collection of Dundas-related records soon began to spill out of their own company offices. A dedicated space was needed – and only the best would do.

With a donation of land from Della Pirie, and financial support from the Bertrams and an enthusiastic citizenry, the long-awaited museum broke ground in 1955. Officially opening on April 21, 1956, the new Dundas Historical Society Museum was a remarkable building for its time – as one of Ontario’s rare purpose-built museums, the designers used cutting-edge building technology to render it fireproof and climate-controlled. In addition, all of the collections were also protected by display cases donated by the Royal Ontario Museum.

The present museum complex is the result of several additions and expansions to the 1956 structure. In 1974, Dundas’ first designated heritage building, the 1848 Doctor’s Office, was moved onto the museum grounds. In 1975, the museum purchased the Pirie House, its 1873 next-door neighbour, in anticipation of future growth.

Project Summary

Completed from November 2012 to November 2013, the Dundas Museum and Archives’ \$1.4 million, capital project resulted in the construction of a double-height atrium to connect the original Dundas Historical Society Museum building to the newly renovated Historic Pirie House. The house was retrofitted to better serve the community through improved rooms for programming and educational workshops as well as the inclusion of a rentals program. Additionally, this project saw galleries and workspace expanded, and greater accessibility through the instalment of an elevator. Lead by a building committee with strong connections to their federal, provincial and municipal representatives, this board driven project was made possible by securing \$1.2million from the Ontario Ministry of Agricultural and Rural Affairs. It was brought to life through collaborative efforts made by a supportive architect and a qualified building committee.

The “What”

What is the Dundas Museum and Archives’ operational model?

The Dundas Museum and Archives’ facility is non-profit owned and operated. Governed by a Board of Directors and operated by a professional staff.

What did Dundas Museum and Archives build?

The Dundas Museum and Archives’ 2012-2013 capital project provided upgrades to a facility that had not experienced significant renovations since 1963. Prior to the renovation project, the facility offered

limited programming and educational space, and office and workspace was at a premium. There was a small assembly hall in the basement, which would act as a workroom during the day and cleared for rentals in the evenings. The building was also not physically accessible to the public as it did not have an elevator and featured stairs throughout.

The expansion project included a newly built double-height atrium connecting the Dundas Historical Society Museum to the Pirie House and a barrier free entrance to the facility. The re-design included an improved LED lit feature gallery and the addition of a third gallery. It featured the instalment of an elevator beside the stairs in the new atrium to ensure the split-levels of the facilities were physically accessible and a reference room space to facilitate research inquiries. The other significant component of this project was the transformation of the Historic Pirie House from a rented family home to museum-designated space, additional space for programming and community rentals.

What was the project timeline?

This project dates back to a primary plan for expansion in 2009. After deciding that renovations were required to update and modernize the facility, the Dundas Museum and Archives partnered with Dundas Valley School of Art and the Carnegie Gallery to submit a joint application to secure funding from the 2009-2010 Federal Infrastructure Program. From this application, only Dundas Valley School of Art was successful in securing funding. Accordingly, the Dundas Museum and Archives took the next couple of years to further develop their expansion plans. In July 2012, they secured funding from the Ontario Ministry of Agricultural and Rural Affairs and construction began in November of 2012. The museum was reopened on November 2nd 2013, one year after the museum had closed for the construction project.

The “Why”

Why did the Dundas Museum and Archives take on this Capital Project?

Part of the early push for renovations was initiated by Archivist Sandra Kiemele. She and fellow staff undertook a spatial needs assessment in 2009 that highlighted the lack of storage, exhibition and office space. These issues were reported to the Board, and introduced the need for expansion.

The motivation for the project ultimately stemmed from the Dundas Museum and Archives staff feeling restricted by the building 1960's footprint. The organization had reached a point of stagnation in their operations, and there was a need to modernize the facility to ensure they maintained their organizational vision. In order to be a welcoming space that engages the community with Dundas' heritage, staff and stakeholders recognized the need to develop and rejuvenate the facility. They wanted to see the space transformed into an accessible facility that would empower them to host more dynamic programming and increase collections. Considering the limited exposure and knowledge of the space within the community, the organization wanted to reaffirm their value and better position themselves within the consciousness of community.

The Dundas Museum and Archives also aspired to be more financially sustainable. As they maintained their founding vision of free attendance for all visitors, operations were mainly funded by the H.G. Bertram Foundation, provincial support and donations. By retrofitting the historic Pirie House, not only would they increase programming and exhibition space, they would be able to integrate a rentals program into their budget to help sustain operations. Having a rental space available for community use would also align with their goal of being more intertwined with the community.

The “Who”

Who do these spaces strive to serve?

The renovated facility is intended to serve as a community space open to all. The Dundas Museum and Archives anticipated their affordable rentals program would offer a new opportunity to bring the public into the facility and subsequently enable them to rediscover or be introduced to the museum and interact with current exhibitions. The newly integrated Pirie House would also benefit the museum’s educational initiatives by providing a more suitable space to host workshops and school groups.

Their new venue was also intended to serve as a catalyst for the formation of new partnership opportunities, and better support established partnerships with local arts and culture organizations such as the Carnegie Gallery and Dundas Valley School of Art. With this renovation project the Dundas Museum and Archives would be in a better position to welcome organizations into their space to create and host community events and curated exhibitions.

Who led the project within the Dundas Museum and Archives?

To ensure the project was completed on time and on budget, the museum assembled a building committee to lead the project by making informed decisions on the construction plan and execution, and attending on-site meetings with the architect and contractor. This committee was made up of board representatives, recruited for their pertinent skillsets.

The building committee included:

- **Clare Crozer**, Board Chair and President, throughout the project and led fundraising efforts
- **Bill Stewart**, a veteran contractor to act as the main liaison with the contractor and architect on a day-to-day basis
- **Ron Simpson**, Board Treasurer, former CFO and CRA auditor. Simpson provided monthly accounts to the board, made weekly adjustments to project cost estimates, gathered invoices from the contractor and communicated regularly with the granting agency at the province
- **Keith Green**, Board member and chair of the Property Committee. Green brought an eclectic entrepreneurial background with business relationships with lighting and electrical

- **Kevin Puddister**, Curator & General Manager. Despite being a board driven project, Puddister offered his expertise in museum management and maintained a regular communication line to staff throughout the project

The committee would keep the board aware of the construction progress but only come to them for major financial or legal decisions, to maintain the estimated project timeline.

Who was contracted for this project?

This capital project was an architect-led design build, led by McCallum Sather Architects. They were selected based on an established connection with a board member. Keith Green knew Joanne McCallum through the Rotary Club of Hamilton and brought her in to consult and develop a plan for the 2009 version of our expansion plans. Given this history, they were an automatic choice for the project when we reassessed everything and included the idea of an expansion into the Pirie House. From this firm, Architect Drew Hauser and project lead Michelle Austin were instrumental in the success of the project. Their roles included: creating design plans, facilitating the permitting process and RFPs, contractor selection, regular on-site review and consultations.

While the contractors were subcontracted by the architectural firm, they were chosen based off a joint decision made by the firm and the Dundas Museum and Archive's building committee. Collaborative Structures Limited were the chosen contractors, selected through an RFP posted by the firm. The on site representatives were Brian Nightingale and Garth Cressman.

Several important factors the team considered in their selection process was; previous experience working with heritage buildings, undertaking projects of similar scale, and ensuring local involvement. As a community space, it was important that the selected contractor engaged the local community through local vendors and manufactures.

The other project consultants subcontracted by the architectural firm included Crozier & Associates Consulting Engineers and VRM Consulting Engineers.

Who were the project stakeholders outside of Dundas Museum and Archives?

The primary stakeholders that have maintained a vested interest in the Dundas Museum and Archives operations and success, is the H.G. Bertram Foundation and family. Along with financially supporting their operations, the extended Bertram family have been vocal supporters of the museum, frequent visitors and present at Annual General Meetings. They welcomed the change and rejuvenation of the museum.

Who opposed the project?

As the Dundas Museum and Archives is located in a residential area, there was some concern from community members over expanding the facility and offering a rentals program. Some feared it would

take away from the mandate of the space and see the facility transformed into more of a banquet centre for larger functions. Ultimately, many were concerned about potential events and noise levels that would disturb their quiet residential neighbourhood. Once the new facility opened and the community's fears went unrealized, most of the opposition dissipated. While they did offer an open house after construction was completed, the project team realized in hindsight that a more proactive approach would have helped mitigate some of the community's concerns sooner. Offering tours or information sessions during or even before construction could have improved community by-in from an earlier stage.

The “How”

How did the project move from conception to construction?

While the intention for expansion was conceived in 2009, the Dundas Museum and Archives' initial plan and application for funding was denied. For the next few years, the board invested time and money into further developing the plan, and began looking into ways to make the museum more financially sustainable.

The museum had owned the Pirie house, the building next door to the museum for nearly 40 years. It was being rented as a family home and generated some revenue on an annual basis. Once staff recommended exploring an expansion to this space, the visionary idea to join the buildings was developed by the board. With confirmation and exemplar drawings made by architects at McCallum Sather, a new project plan was developed. This plan included joining both buildings and creating an accessible facility for the community. The board then used their political connections to advocate for public funds for this project. Once the Board of Directors secured a \$1.225 million provincial grant in 2012, the project was able to move to construction.

How was the construction plan formed?

The construction plan was formed by the architects and contractors, and based off of the architect's drawings. All decisions were discussed and approved by the building committee before the construction plan moved forward. The construction plan was a collaborative effort, with decisions being made during regular meetings with the building committee, architect Drew Hauser and project lead Michelle Austin as well as contractor representatives Brian Nightingale and Garth Cressman.

How was accessibility included in the project?

Accessibility was a major component as it was one of the primary motivators for undertaking this capital project. The addition of the ramp at the side entrance and newly installed elevator ensures a barrier free entrance and the ability for the public to move through the facility freely. Washrooms were made

accessible and doors have been widened. With the elevator able to go down to the new workspace in the basement the building is also accessible for staff. Staff and volunteers have also received accessibility training to ensure they are equipped to accommodate accessibility requests and ensure visitors feel comfortable in the building.

How was energy efficiency and the environment incorporated?

While this project saw the facility grow almost twice in size, monthly electricity bills have drastically reduced. This is largely due to the fact that the atrium is well insulated and the facility is all connected, ensuring the heat or cold does not escape the building as quickly when the front door opens. The facility has also been retrofitted with LED lighting.

How were contingencies managed?

Within this project, there were several contingencies that affected the project budget. They included the need to add a second layer of dry wall to create fire separation and reinforce foundational beams in the basement of the building. Another contingency that affected the project timeline and budget was concerns of asbestos in the building. The team had to cease construction and produce 65 individual pieces of the wall to test for contamination. When the results came back negative they were left with a bill for \$6,500 and were behind in construction. In the end, the construction team was able to make up for the time lost, and the project was completed as initially planned.

The extra costs incurred during construction came out to \$115,000. In order to manage these contingencies, the team had to determine what was truly a priority in the project, and what could be added at a later date. In order to accommodate the extra costs, the team chose not to install a new sign and deferred the landscaping to a later date. While they had set a 15% contingency fund, all necessary expenses caused them to spend 17%. They were able to offset the extra costs through later fundraising.

Additionally, the benefits of being in a small community were highlighted in how an issue with the hydro connection was resolved. When a board member shared the difficulties they were having in getting support from the utility company for the hydro connection at their Rotary Club meeting, a phone call was made to the president of the hydro company and the issue was resolved the following day.

How were day-to-day operations impacted?

Throughout construction, the Dundas Museum and Archives closed as a facility. They had a small working space in the former Town Hall to maintain their reference services for the archives, but ceased all exhibitions and programming. They maintained a web and social media presence to keep their membership engaged and offered project updates throughout. Once they returned to the facility in July, efforts shifted to installing exhibitions and preparing for the opening.

How were programs managed during construction?

Throughout the year of construction, the Dundas Museum and Archives did not offer any programming.

How was the project funded?

Funding for this project came from provincial and federal funds as well as donors and a subsequent fundraising initiative.

The first grant the Dundas Museum and Archives received was through the Rural Programs Branch program at the Ontario Ministry of Agricultural and Rural Affairs. In order to secure this funding, the board of directors worked alongside the Carnegie Gallery to approach MPP Ted McMeekin, their MPP, with a request for funding. The Federal and Municipal governments had already supported the successful Dundas Valley School of Art project. McMeekin was connected to the needs of the community (the Carnegie Gallery and the Dundas Museum & Archives) and understood that the Provincial Government would look good to come to the plate to support the Dundas community. In the end \$2,450,000 was found through a program at the Ontario Ministry of Agricultural and Rural Affairs to be divided between the Carnegie Gallery and the Dundas Museum & Archives. In 2012 the province announced that each organization would receive \$1.225 million.

The elevator was funded through a \$75,000 grant from the Federal Government's Enabling Accessibility Fund. As this was a matching grant, \$75,000 was matched by a donation from Robert and Eva (Bertram) Cole, daughter of their founder H. Graham Bertram and her husband.

After the new facility opened, the Dundas Museum and Archives leveraged the momentum of the new building to lead a successful fundraising campaign, surpassing their goal of \$200,000 by \$10,000. They targeted outreach to their mailing list, friends of the museum and established donors. They achieved their fundraising goal and donors have been recognized on a plaque in the museum.

The "Ongoing"

How were new financials projected?

Board Treasurer, Ron Simpson, projected the financials for the new facility. In the projections, they anticipated earning \$10,000 in revenue for their rentals program and anticipated spending approximately 20% more on hydro costs. Despite nearly doubling in square footage, hydro costs remained essentially the same, then began to drop slightly after a few years. They also anticipated facility maintenance and operations costs would increase as the foot traffic increased in the building.

How is the Dundas Museum and Archives account for increases in expenses?

After opening, they determined they were too conservative in projecting the revenues they would gain from their rentals, and over estimated their expenses for the new facility. They were able to update their budget accordingly once the expenses of their first year were determined. After converting the Pirie House from a housing rental property to a rentable space for community programming, their revenues from the property doubled. This increase in revenue is incorporated into the ongoing programs, staffing and maintenance costs for the museum.

Was new staff hired?

In order to keep up with the increase in programming initiatives and rentals, The Dundas Museum and Archives hired a new part-time Education Coordinator and three casual Museum Attendants. Once the facility re-opened a regular custodian was also hired to come in weekly or twice a week, depending on the rentals calendar, to ensure the facility was kept clean. These positions have been worked into the budget, and funded through general revenues and support from the Bertram Foundation.

How is the facility being operated and maintained?

While the Dundas Museum and Archives does not use an asset management software, Keith Green, Board member and Chair of the Property Committee looks after the building and larger assets. The organization maintains a capital reserve fund of 25% of their annual operating budget to maintain the facility and pay for any unforeseen major repairs.

What lessons were learned in the first 90 days?

Within the first few months of re-opening, the team learned how operations had to be altered to accommodate the new facility and increase in foot traffic. This included additional expenses to improve the cleanliness of the building, and adding security features. Staff chose to install security cameras inside and outside the facility. Considering there is often only one staff member behind the front desk, having cameras ensures all rooms within the building are monitored for improved security and safety.

What lessons were learned in the first year?

Within the first year, staff moved through the different seasons and continued to adjust their operations. This included accounting for snow removal and learning how to account for the change in utility bills to improve their budget projections.

Through this project, they were also able to learn the importance of a thorough business plan. While renovations may seem obvious to staff that are in the building on a daily basis, a business case must often be made to articulate the value of a renovation project. Outlining where the funding will be

coming from and how the project will support the financial sustainability of an organization are fundamental within this plan. Including how the building will be managed following construction will also strengthen the argument. Once created, this business plan can then be shared with the board, funders and supporters to secure buy-in for the project.

Finally, this project also demonstrated that the value of a strong project team cannot be underestimated. By ensuring the building committee was a collective of individuals with specialties to offer the project, informed decisions were made that led to the success in the planning, construction and ongoing phases of a project.

Case Study Summary:

The Dundas Museum and Archives 2012-2013 renovation project was ultimately established by a resilient building committee with a mission to ensure a sustainable organization. While their initial plan may have seemed thorough, it was only the setback of being denied their initial request for funding that allowed the team to regroup and improve their plans. What followed was a plan to include the Pirie House and greater accessibility into their project to rejuvenate the facility. With these additions, the Dundas Museum and Archives is able to welcome and better engage the community, successfully re-positioning themselves within the consciousness of their community.

While funding may have provided the means to build, what enabled the success of this project was a team recruited for their specific qualifications. Paired with a strong partnership with the architectural team that was based on collaboration and communication, the project team was able to see their vision of a sustainable organization realized. With the success of this project, the Dundas Museum and Archives is able to effectively serve as a place to gather, and most importantly, keep the historic stories alive for the Community of Dundas.

Resources

The following resources below have been provided as additional information for readers.

Website

- <https://dundasmuseum.ca/>

Documents

- [From the Past to the Future – Capital Project Package](#)
- [Capital Renovation Drawings](#)
- Fundraising Materials
 - [Friends Fundraising Letter](#)
 - [Building on the Past: Capital Fundraising Form](#)
 - [Thank You Letter to Donors](#)
- [Opening Day Invitation](#)

ArtsBuild Ontario Webinar

- Volunteer Boards and Creative Space Projects
 - [Webinar Recording](#)
 - [Webinar Transcription](#)

Project Summaries and Announcements

- [November 2013 Grand Reopening Video](#)
- [Dundas Museum and Archives 2013 Winter Newsletter – Reopening Announcement](#)
- [Architizer Project Summary](#)