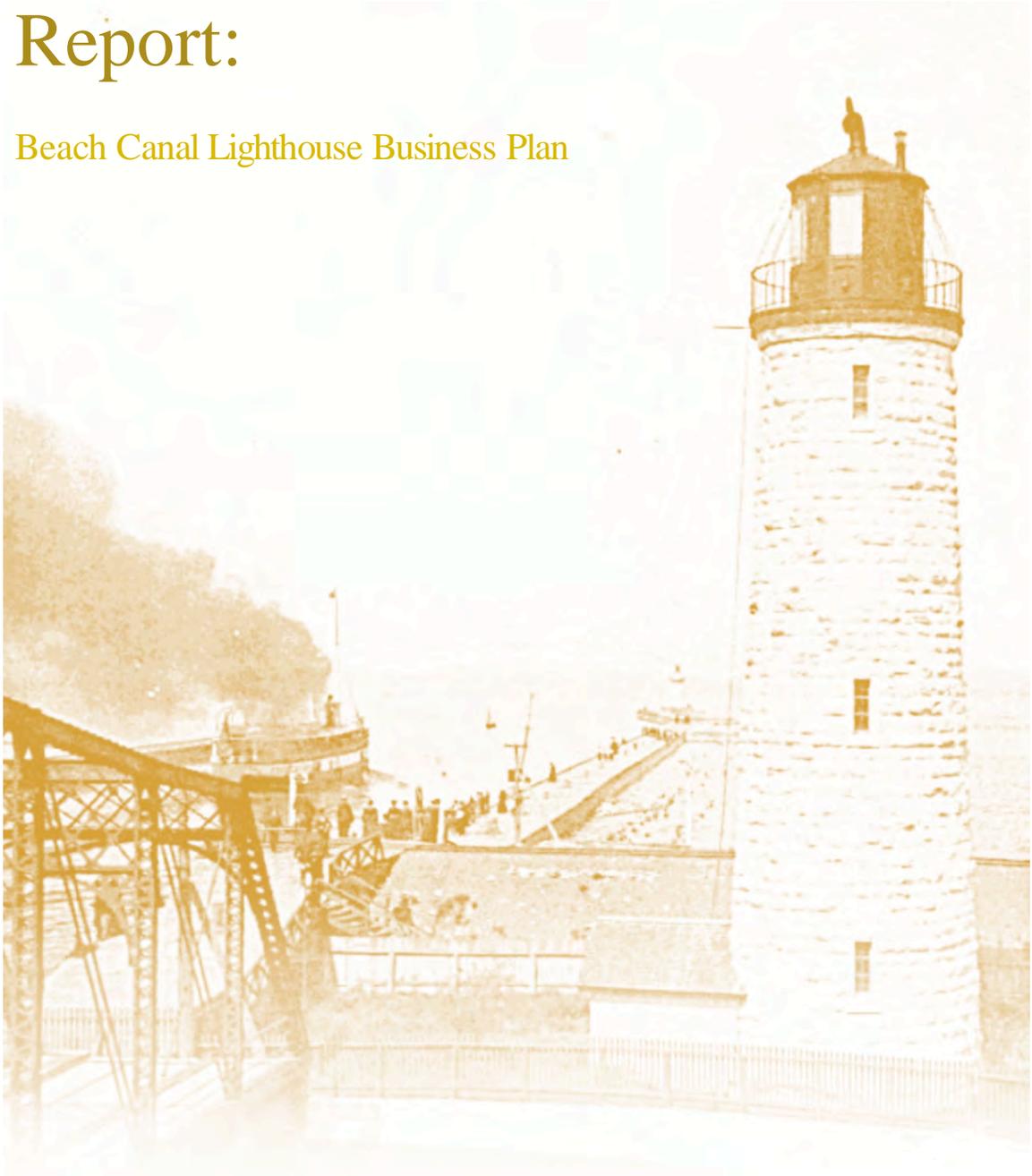




**GBCA**

# Report:

## Beach Canal Lighthouse Business Plan



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Cultural  
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Consultants

and

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For  
**Beach Canal Lighthouse Group**  
17 June 2009



**GBCA**

17 June 2009

To: The Beach Canal Lighthouse Group

Re: Business Plan, Beach Canal Lighthouse Development

Dear Friends:

We are pleased to provide to you several copies of our Final Report for the above captioned project. We trust that you will read this document with interest and appreciate the opportunity to assisting you in the realization of this interesting project.

We wish you good luck and success in the preservation of this important landmark.

Yours sincerely  
Goldsmith Borgal & Company Ltd. Architects

Christopher Borgal OAA MRAIC CAPHC  
Principal

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## **Executive Summary**

### **General Comment**

This report provides an analysis of a number of possible scenarios that the Beach Canal Lighthouse Group could consider in moving forward into a business plan. Four scenarios were developed (some with two iterations). From those scenarios, we have determined two options, which, in our opinion, would be the most appropriate given the complex issues of site, costs, long-term sustainability, and resources. The two options, which can be implemented in sequence, include capital costs and revenue/expense projections.

### **Approach to the Project**

In this report, the options described are based on the assumption that all proposed interventions and materials for the restoration of the existing buildings – the Lighthouse and Keeper’s Cottage – would be considered as elements of a complete system and in accordance with current international policies related to the conservation of historic sites. In accordance with the same policies, all interventions should be reversible - as far as is practicable and technically feasible – so that the original elements of the buildings can be reconstituted if new information or methods of restoration become known in future.

Due to the importance of this site and the complexity of the conservation issues, we would recommend that, in moving forward, a consulting team be assembled with a well-established record of competence in industrial heritage conservation work of this type.

### **Options**

After looking at several different scenarios (as outlined in section 3 of this report), we ultimately developed two options for consideration. Option One is a low-key site-specific restoration and interpretive site with a focus on the structures and features of the immediate site. Option Two is a more ambitious program with focus on both the immediate site and the broader cultural interests of the City of Hamilton and communities surrounding it. It will be up to the community to determine which response is best in terms of Options One or Two.

#### **Option One**

In Option One the Beach Canal Lighthouse<sup>1</sup> site would be operated as a year-round operation within the existing buildings with a number of paid staff. This should be the minimum objective for the development of the site. It ensures restoration and use/occupancy of both structures and provides an interpretive function to illuminate this important heritage site to the immediate community and to passing visitors.

As discussed in this report, Option One is limited and will have little incremental beneficial effects for the City of Hamilton at large beyond adding the needed interpretation of a key part of the history of the city. However, it is a reasonable and responsible response to this important heritage resource and should be supported if Option Two cannot be funded.

#### **Option Two**

Option Two represents a much more sizeable commitment both in terms of initial capital cost and annual operating costs. In Option Two the Beach Canal Lighthouse site would be operated as a year-round

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<sup>1</sup> The formal contract for this study has been with the Beach Canal Lighthouse Group with “Beach Canal Lighthouse” being the local name for the site. However, the formal (federal) designation for the buildings is the “Burlington Canal Light Station”. For the purpose of local clarity (and contractual consistency) we have used the local name throughout the report.

# Beach Canal Lighthouse Business Plan

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operation with the introduction of a separate purpose-built building for an interpretive centre.

The benefits to the community will be much higher than Option One in its ability to better showcase the themes of the industrial site, act as a gateway to attractions in the City of Hamilton and surroundings, and create a heritage/cultural function in an incredibly important heritage zone in Ontario. This site has been progressively by-passed and over-passed by incremental additions and changes to the transportation networks that intersect here. While these transportation changes have virtually concealed the Lighthouse and Keeper's Cottage from the view and consciousness of passers-by, they also represent the biggest opportunity for the site and for tourism in Hamilton due to the high volume of traffic passing by. If only a small proportion of the tourist traffic was captured (and the pattern of roads and ramps lend themselves to easy access to both tourists coming from Niagara and to tourists from Toronto going to Niagara Falls), the site should be more than viable and – as a guidepost to other attractions in Hamilton – it would make other attractions in the City more viable as well. While the contribution to the operations of the business case in Option Two would be larger than for Option One, the benefits would far exceed the additional costs. In other words, there would be considerably more “bang for the buck” were this option to be implemented.

## Capital and Operating Costs

We have included preliminary capital costs for each development. While the costs for each may seem daunting for a small organization, the key to success is the marketing of the “idea”. Capital costs, in reality, represent only a very small proportion of the long-term operational costs of any heritage site and therefore it is vital that the “package” that is developed be both viable and a revenue generator over the long term. Communities as small as both the counties of Huron and of Bruce have seen the importance of presenting their history through their county museums and, despite populations each of approximately 60,000, have put several millions of dollars into their sites to showcase their history to visitors and to their own populations.

We have provided budgets for each option and based revenue streams on projected attendance levels, which are conservative given the volume of potential visitors passing near the site. With appropriate marketing activities, as we have outlined, these visitation levels should be achievable. Creative management of the site, and the provision of facilities that can be used by a wide variety of interest groups for many types of programming activities will reinforce the vitality of the resource and allow for reinterpretation of its functions and offerings into the future.

## Ownership

The most logical owner of the land and buildings is the City of Hamilton or another public-sector body. This would be contingent on arrangements being made to transfer some of the lands at this location to the City. Another land-use scenario would be a long-term lease from the agencies in control of the property on which the site is located. In either scenario, the land sold or leased should be of sufficient size for the full scope of the selected development option for the site that we have recommended at 65,000 square feet. This would include the required lands for other facilities such as parking and other structures as recommended for the selected development option.

## Recommendations

Throughout the report we have provided a number of recommendations – some are related specifically to the two options and these are summarized in Section 7 of this report, while others, of a more general nature, are summarized here:

- *The most logical owner of the land and buildings is the City of Hamilton or another public-sector body. It is recommended that negotiations be commenced as soon as possible between the City of Hamilton, the various elements within the federal government, and the Hamilton Port Authority in order to secure a clear title to the*

# Beach Canal Lighthouse Business Plan

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*Beach Canal Lighthouse and the Keeper's Cottage including all access and parking for the facility, and, if the ultimate decision is to develop an Interpretive Centre on site (Option 2) that the negotiations referred to above include sufficient space to provide for the establishment of an Interpretive Center of approximately 20,000 square feet total area and such parking as will be deemed to be necessary in accordance with the attendance projections offered in this study. Total recommended area for the site should be 65,000 square feet.*

- *It is recommended that a 'business map' that charts the operation's course over the next 5 years be developed. This dynamic plan could, of course, be updated as customer trends and heritage markets evolve. (The document could well lead to previously unexplored 'idea development' steps.)*
- *It is recommended that the Beach Canal Lighthouse Group call or write local MPs, Senators and Mayors and tell them that the National Lighthouse Protection Act should be rigorously used to help keep the 'Lights On'.*

## **Overall Benefits**

Many heritage sites that are developed in a modest manner will fail once the originators of the site move on, pass away or lose interest. That is a key reason for this site to be operated by the City of Hamilton or another public-sector body from the outset. It is also a reason to think on a larger scale to ensure that the site does not remain a "backwater" but becomes a vital centre of attraction for heritage-related interests and a key component of the landscape of sites throughout the City.

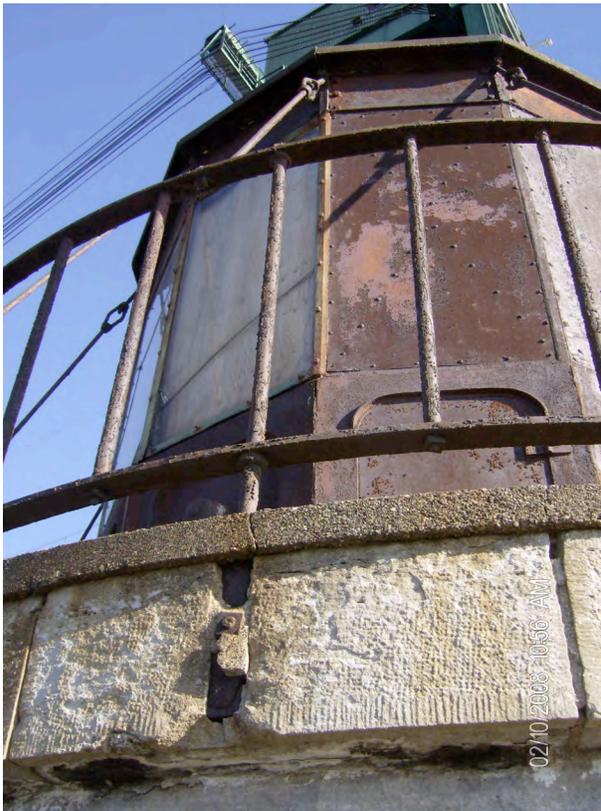
Indeed, the site can be viewed as the key component for the following reason – the entrance across the bar was the original entrance to Hamilton – it was Hamilton's front door. The industrial story ranges from the early development of the shipping industry to the creation of a major industrial centre in North America.

Museums and historic sites should not be seen as stand-alone facilities, but viewed as part of the quality of life components that are so vital for a dynamic community wishing to provide its residents and visitors with a "value added" experience within the municipal boundaries. Of interest are some of the comments received in a review of an earlier draft of this report which suggested that the interpretation of industrial development should be included even though, in some quarters, such enterprise carries a level of stigmatization that may be at odds with the natural environment found at this site. Certainly the contrast is great, but so too is the opportunity to discuss man and the environment, the creation of stable economic activities, and the co-existence of industry and nature.

As proposed in Option Two, by using the site to showcase this heritage and the environment at an interpretive centre at this location, this historic entrance to Hamilton can again become the front door to Hamilton. This new facility can re-establish and re-define this entry point making this the orientation point for potentially hundreds of thousands of visitors into the future.

## Section 1

The Beach Canal Lighthouse<sup>1</sup> property – which includes the Lighthouse and Keeper’s Cottage – is a culturally unique site. Its significance stems from its relationship to the history and development of transportation at the tip of Lake Ontario - not only shipping but also land transportation (bridges, highways and ferry services). Since the Canal was first opened to vessels over one hundred years ago, it has helped to develop the areas of Burlington, Dundas and Hamilton and it remains a significant symbol of both Hamilton’s and Ontario’s history of industrialization and development. The impact of the Beach Canal on the development of Hamilton and the surrounding area, enabling delivery of raw materials to industry and export of product to national and international markets, cannot be underestimated. The property is also geographically unique and a fascinating story is told from this one vantage point at the Light Station, including chapters on the history of industrial development in Ontario, development of a city’s infrastructure, recreational opportunities in years past and present, and a highly sophisticated modern industrial complex vital to the economy of the country. As the bulk of early commerce and trade between communities in Ontario flowed along the Great Lakes, the lighthouses on the Beach Canal have been a symbol of Hamilton Harbour’s growth and development. The history and interpretive opportunities of this site are considerable.



The objective of this current report is to support appropriate preservation and use of the Beach Canal Light Station site. The report includes recommendations for governance and appropriate ownership, along with a discussion of the condition of the two existing buildings—the Lighthouse and the Keeper’s Cottage. Specific objectives for the report include:

- Identification of options for sustainable public access to the site with recommendations for preferred options
- Management structures based on each option
- Five-year business plans for each recommended option
- Condition review of existing buildings with recommended approaches for preservation along with associated costs

It should be noted that this report is not a Master Plan. Its findings should be considered as only one building block in a more detailed examination of the canal area, which would illustrate how to make these recommendations more viable. A Master Plan could provide conceptual and detailed layouts and could interface with proposed developments on adjacent lands currently owned by the Hamilton Port Authority.

It should be noted that while the first and most important tasks will be determination of site ownership and operations, and how any land transfers in support of the facility will be arranged, nothing should preclude the on-going work of the Beach Canal Lighthouse Group in the preservation and restoration of the two key

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<sup>1</sup> The original federal name for this site is the “Burlington Canal” and the “Burlington Canal Light Station”. However, locally, the site is known as the “Beach Canal Lighthouse” and, as this is also the name of the group that commissioned this report, we have used this local name for the site throughout.

# Beach Canal Lighthouse Business Plan

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elements of the site – the Lighthouse and the Keeper’s Cottage. Such preservation work is critical to the long-term survival of these structures.

## History of the Site<sup>2</sup>

The Great Lakes appeared with the disappearance of glaciers at the end of the last Ice Age. Currents at the western end of Lake Ontario were heavily influenced by the massive flow of water from the Niagara River. Water flowing from Niagara fanned out, and a portion of this flow created land formations including a sand bar known as “The Beach” in Hamilton.

In 1823, the “Burlington Bay Canal” was proposed as one of a series of waterways intended to open Lake Erie to sea traffic from the Atlantic. Local residents accepted this idea, as it would make Burlington Bay a usable harbour linked to the extensive shipping and commerce already developing on nearby Lake Ontario.

Canal work was commenced in 1826 but was not complete until 1832. To act as a navigational beacon and guide for vessels entering the canal, and as a part of Britain’s desire to improve navigation and enhance development in her Canadian colonies after the War of 1812, a wooden lighthouse was completed in 1838 on the south side of the canal. Its design was similar to many others constructed in the early 1800s - many early and mid-19th century lighthouses of similar design remain on the East Coast of Canada as well as in Georgian Bay. A lighthouse keeper was hired to maintain the light and building. The keeper worked in conjunction with the ferryman - their homes were built in close proximity.



*Source: 1956 Globe and Mail Photo*

Although the usual problem with stone lighthouses on the Great Lakes was water spray freezing in the mortar, untypically the flaw of the first lighthouse at the Beach Canal was that it was constructed of wood<sup>3</sup> and was therefore susceptible to the random spray of embers from the smokestacks of passing steamers. On several occasions, it was reported that the ferryman and lighthouse keeper had to rip off pieces of the pier and throw them into the canal because they had caught fire. On 18 July 1856, the steamship Ranger was passing through the canal when sparks strayed and caused a major fire that destroyed the lighthouse, a ferry, and two houses. A temporary lighthouse was built and was eventually replaced in 1858 with the current structure.

John Brown<sup>4</sup>, who was contracted for eleven and actually constructed the six imperial towers on Lake Huron and Georgian Bay in the mid 1850’s, was hired to build the 1858 Lighthouse<sup>5</sup>. It was constructed of

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<sup>2</sup> Extensive research has been done on the history of the Lighthouse and Keeper’s Cottage and is therefore not recounted here. The Beach Canal Lighthouse Group made this information available to us.

<sup>3</sup> Ironically, the Presqu’ile Light, constructed of stone c1845, was subject to freezing such that a massive crack formed on the south (lake) side of the stone tower within a few years of construction. To prevent collapse, the tower was banded with tripled planks of 2x6 framing staggered up the exterior (to allow ventilation of the stone) and then covered with wood shingles – a stone tower that became a wooden one, which is how it is to the present day.

<sup>4</sup> Great Lakes Lighthouses Encyclopaedia

# Beach Canal Lighthouse Business Plan

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white dolomite limestone (over five feet thick at chest height) and about 55 feet high. It was almost identical to the lighthouse built by Brown on Christian Island in Georgian Bay, and similar to his recently restored Chantry Island Light in Southampton and the Point Clark Light north of Goderich on Lake Huron.

On completion of the stonework, an interior staircase was installed which was typical of 1850's Lights (earlier lighthouses, such as the one constructed c. 1845 at Presqu'île and the 1818 Thames River Light at Lighthouse Cove, near Windsor, had similar stairs although they usually had straight rather than curved runs). This was followed with the addition of the lantern room at the top. This lighthouse was one of the first to use coal oil, rather than the traditional whale oil<sup>6</sup>. This began a new trend in preferred energy sources, which angered many whalers, since it threatened their livelihood – although since Kerosene was invented in Nova Scotia a few years earlier, it still had the net effect of supporting Canadian producers.



The Lighthouse was maintained without major repairs until 1958—a time frame not dissimilar to that of the Bonavista Light in Newfoundland, which was in continuous operation from c1845 to 1962.

In 1958, a powerful storm swept through the region and the Lighthouse that was thought to be indestructible sustained damage with water penetrating and damaging its structure and lantern. A few months after the storm, timber planks were bedded in concrete to make the foundation of the Lighthouse stronger so that it could withstand the exterior elements.

In 1961, during a period when many other vintage lights were replaced with alternative aids to navigation, the Beach Canal Lighthouse was replaced with a modern electric beacon. Visible to approximately 15 miles from the canal, this beacon was located on the new lift-bridge. The light keeper remained in residence, retained to tend this new light and the range lights located at the ends of the canal piers. The Beach Canal Lighthouse station officially ceased operations in 1968, marking the end of manned lighthouses at the Beach Canal, yet the stone Lighthouse was not torn down due to costs of demolition.

In addition to the Lighthouse, the site includes the c. 1850's Keeper's Cottage, which is in a remarkably good state of preservation despite its disuse over a period of several decades. The Keeper's Cottage was relocated in 1896 when the swing bridge for the new electric "radial" railway line was constructed – originally, its front door faced the canal.

## Recent Background

The Lighthouse and Keeper's Cottage are the two oldest remaining structures on Hamilton Beach, yet these buildings have remained essentially ignored since the 1961 decommissioning. In the over forty years since the decommissioning of the buildings on this site, there have been many discussions related to their

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<sup>5</sup> Of interest to the current report, one of its authors (C. Borgal) authored the Federal Heritage Character Statements for each of the Lake Huron/Georgian Bay Imperial Tower while under contract for the Federal Heritage Conservation Program in the 1990's.

<sup>6</sup> The hatch at the ground floor gave access to the oil storage cellar, which still smells of coal oil. Of interest is that, for safety reasons, lighthouses in the U.S. typically had a separate building for storage of the oil while the British American sites used the space under the entrance in the main tower.

# Beach Canal Lighthouse Business Plan

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potential preservation. However, their location between a 1950's lift bridge and twinned skyway bridges, along with their unusual ownership situation, have made them a challenge in terms of the potential for their preservation<sup>7</sup>. Despite the on-going neglect, they have survived as a testament to the quality of their original design and construction.

In 1996, the City of Hamilton designated the Beach Canal Lighthouse site (both structures) under Part IV of the *Ontario Heritage Act*. Although lower level governments cannot enforce bylaws on structures owned by upper level government, such a designation is typically respected federal policy.

In May 2003, two residents of the Hamilton area approached the Department of Fisheries and Oceans to determine if and how the structures might be preserved. They received a positive reception, which they conveyed to others as a potential new opportunity to save and use these buildings.

The founding meeting of "The Lighthouse Project" was held on 16 November 2003 with 32 people in attendance. There appeared to be good consensus regarding group objectives and it was decided to initiate a formal organization. Accordingly, an election of officers and directors was held, and names of the organization put forward. Ideas were also advanced regarding the means to build the organization and raise funds to cover its initial costs including those of its incorporation.

On 17 November 2003, the Directors met to select a name for the organization from a short list of proposed names. A vote, with members polled by telephone and email, settled on the 'Beach Canal Lighthouse Group' (henceforth in this report, BCLG) and this name was formally announced at the next general meeting, held on 11 January 2004 at which meeting it was decided to proceed with incorporation as soon as possible to expedite potential acquisition of the structures.

At the 8 February 2004 general meeting, the 'Beach Beacon' (the group's newsletter) was introduced and the group elected its first honorary member, Peter Coletti, who was the light keeper for the final 25 years of the Lighthouse's active years. On 14 February 2004 (Heritage Day), the group hosted display tables at Hamilton City Hall and at Mapleview Mall in Burlington – with both sites being very successful in generating awareness and new members. Various other meetings received donations including works of art and publications.

A constitution and by-laws for the organization, prepared by the Directors, were discussed at a general meeting on 14 April 2004. A general meeting on 12 May saw the election of a new Secretary; a review of the constitution and by-laws; and a general review of progress toward incorporation. On 15 May, the group hosted an information table at the annual conference of the Architectural Conservancy of Ontario and Community Heritage Ontario, held in Hamilton.

Over 200 members have joined since the inception of the BCLG including two city councillors; several members of local LACACs, historical societies, and the Architectural Conservancy of Ontario; a number of local artists and artisans; citizens who simply want the Lighthouse preserved; and, a small number who actually lived or stayed at the Keeper's Cottage. Media attention has been achieved with numerous local radio mentions and articles in five different publications.

On 11 June 2004, federal government departments were notified by Public Works of the availability of the land surrounding the Lighthouse and Keeper's Cottage. Expressions of interest, in response to the notice from Public Works, were to have been received by 11 July 2004. Only Fisheries and Oceans (F&O) responded to the notice, paving the way for them to acquire the land; combine the land and structures into two parcels; and make them available to be acquired by BCLG. On 19 June 2004, the BCLG was incorporated by virtue of being accepted as an affiliate of the Ontario Historical Society.

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<sup>7</sup> One Federal ministry owns the structures, the land is owned by another ministry and abuts lands owned by a third and also abuts lands owned by a provincial ministry and a conservation authority.

# Beach Canal Lighthouse Business Plan

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The Architectural Conservancy of Ontario partnered with the BCLG on a successful walking tour of the Beach community in July 2004. The tour began at the Lighthouse and included a rare glimpse inside the Lighthouse and the Keeper's Cottage. At the August 2004 meeting, members approved engaging the services of the Architectural Conservancy of Ontario to perform an initial evaluation of the buildings on the site. This provided a basis for planning the next steps in stabilizing and restoring the structures. Goldsmith Borgal & Company (GBCA) and Jokinen Engineering were employed to assess the tower with assistance from others including Sean Selway. The results of this investigation are included within this current report as Appendix A. Following this evaluation, steps were taken to do preliminary stabilization at the site including securing the lighthouse lantern and removing copious amounts of guano from inside the lantern.

Additionally, GBCA prepared preliminary budgets for the work. These were submitted as a report in the fall of 2007 (included as Appendix B) and the results have been used as a base line in projecting costs of the various options developed under this current plan.

The current report was commissioned in 2008 and continues the process of moving the restoration and interpretation of this site into the 21<sup>st</sup> Century.



*Source photos this page, BCLG*

## **National Historic Significance**

Under the criteria described in *Framework for Evaluating the National Historic Significance of Lighthouses, Agenda Paper 1998-49* the Beach Canal Lighthouse meets at least two of the four guidelines proposed in the Preliminary Assessment of Significance and therefore “may be considered of potential national historic significance”. Eight Canadian lighthouses were designated as national historic sites in 1974, but none has been designated since

The Paper also notes, however, that “A lighthouse should not be considered in isolation, as the ensemble of buildings at a light station may collectively have a value greater than the sum of its parts”. Together with its 1857 Lighthouse keeper's dwelling, the Beach Canal Lighthouse station is Canada's only complete light station remaining on Lake Ontario; this unique situation was not considered in the preliminary assessment but might enhance its eligibility for recognition as a national historic site, if such an application were to be made.

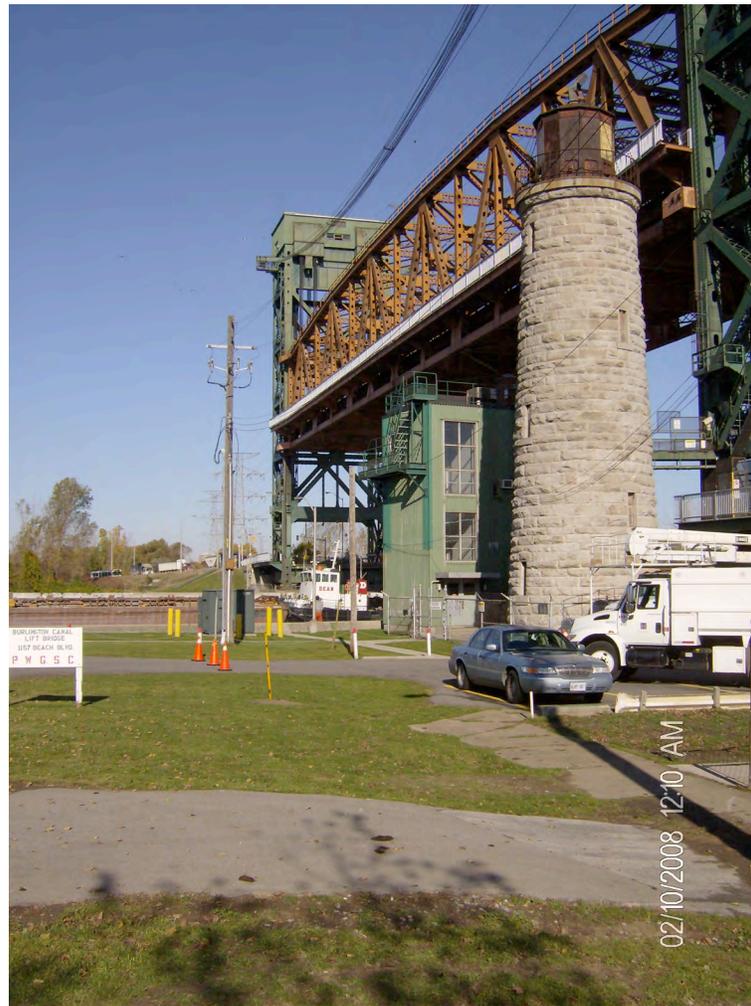
## Section 2

### Site Features

Over the years, a series of bridges were erected and replaced over the canal for both road and railway crossings. To permit ships to pass through the canal all of the early bridges were operable. Three bridges now cross the canal - the Burlington Lift Bridge (immediately east of the Lighthouse) and the two parallel bridges that make up the Burlington Skyway.

Eastport Drive, which swings under the Burlington Skyway to cross the Lift Bridge, passes very close to the rear of the Lighthouse Keeper's Cottage, from which it is separated by a high retaining wall.

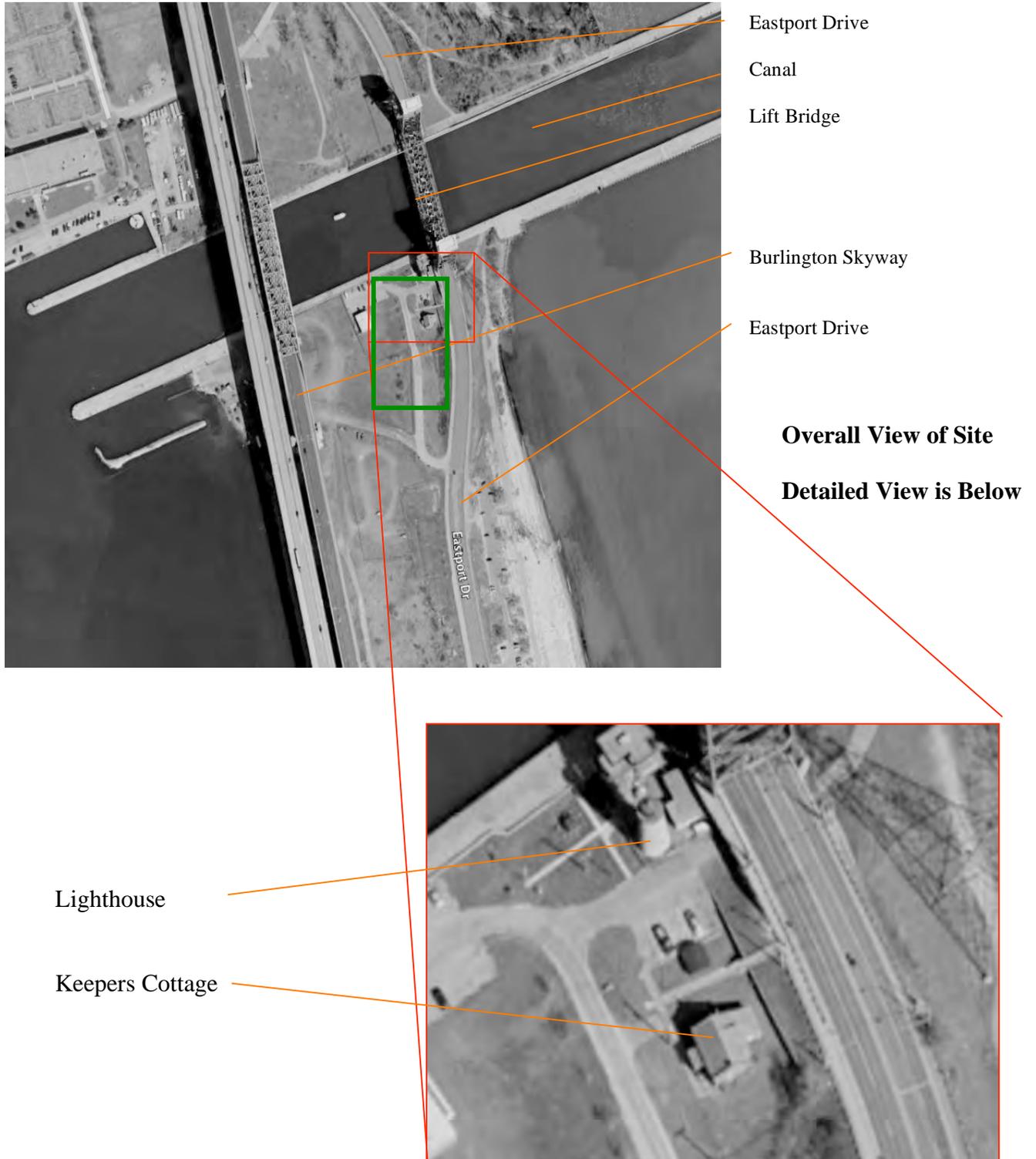
The Waterfront Trail runs along the entire length of the Lake Ontario side of the Beach. At appropriate locations, the Trail has interpretive panels about the canal, the light station, shipping and the various canal crossings. The Trail passes under Eastport Drive in a tunnel, and then steps up to cross the canal on the Lift Bridge sidewalk, thus leading all trail-users directly past the Light Station site.



Adjacent lands are essentially unused except for parking and support facilities for recreational fishermen. A coordinated environmental assessment of the area formed a part of the *Fisherman's Pier Development Plan* as prepared by the Hamilton Port Authority (which project was subsequently cancelled). For many years Fisherman's Pier was an important destination in the local community. The Port Authority's plan was intended to build on this heritage and establish Fisherman's Pier as a major node in the system of public spaces around Hamilton Harbour. As stated in the material prepared by the Port Authority, "The plan is intended to enhance the recreational trail connections in the area and to improve public access to the waterfront. It is also the intention to include commercial facilities such as restaurants and specialty shops. The development on the harbour side of the site will reflect its significant heritage character."

The mandate of the Hamilton Port Authority includes the development of waterfront recreational facilities that serve the local communities. The Port Authority stated: "We believe in cooperating with our neighbours and stakeholders to enhance the quality of life around Hamilton Harbour. The development of Fisherman's Pier could have demonstrated the Port Authority's commitment to contributing positively to the community and to publicly accessible waterfront development." A heritage development associated with the Lighthouse could very well have been an important component of this plan and may again if the plan, or a variant, is reactivated.

# Beach Canal Lighthouse Business Plan



<sup>1</sup> We were unable to obtain a site plan for this site or survey information to demonstrate ownership of the lands. Such a plan of survey should be obtained or commissioned prior to negotiations related to ownership and use of lands.

<sup>2</sup> The green rectangle as seen in the upper image is approximately the area recommended later in this report (appendix D) as being a reasonable size for development of an interpretive facility on the site.

## Site Ownership

We are advised that, under current ownership and site use patterns, any development or rehabilitation of the Beach Canal Lighthouse site would be subject to review and approval by several federal departments and agencies, including:

- Public Works and Government Services Canada (PWGSC), which owns the land on which the buildings are situated and operates and maintains the Lift Bridge;
- Department of Fisheries and Oceans (DFO), which owns the buildings;
- Hamilton Port Authority, which owns adjacent lands and had a study for redevelopment of the area around the canal, titled the *Fisherman's Pier Development Plan*.

Several other agencies and organizations may also have an interest in the future of the light station or land use in proximity to the site. These include:

- Ontario Ministry of Transport
- Parks Canada: Canada Marine Discovery Centre
- Bay Area Restoration Council
- Hamilton Conservation Authority
- Hamilton Harbour Remedial Action Plan
- Hamilton Naturalists Club
- Hamilton Waterfront Trust

Besides these groups, various City of Hamilton departments also have an interest in this property. The site's location within the city and its potential to assist in augmenting the city's tourism potential (due to its proximity to a major transportation route) render it of exceptional interest to the municipality. In fact, it is the municipality that funded the current study.

While properties and agencies of upper level government cannot be bound by municipal regulations, it is usually the policy of the provincial and federal governments to respect local bylaws. Therefore, any development of the area may be subject to the City of Hamilton's re-zoning of the entire length of Hamilton Beach as a significant cultural heritage landscape; a Heritage Conservation District under Part V of the *Ontario Heritage Act* falls within this re-zoned area. However, the city's heritage interests would be better served by the municipality taking over the operations of the site as a part of its cultural programs or by an outright acquisition of the site, either by purchase or lease, which should include both the Beach Canal Lighthouse site and sufficient lands to support the long-term development of the site in line with recommended options. By so doing, the site can be integrated with the total cultural heritage program within the city.

Interviews with the various stakeholders and stakeholder groups were ongoing throughout the study period. The preliminary findings of these interviews were presented to the client at a meeting held on 25 April 2008 at the Hamilton City Center. The results of the interviews suggested that the transfer of ownership of the property from an upper level government agency to some other entity would be complex particularly as a result of the multiple federal departments involved. These complexities can be illustrated by some of the history of the site since 2003 when local residents formed the volunteer BCLG to acquire, restore, and ensure the long-term conservation of the landmark. The initial goal was to allow visitors to climb the tower

## Beach Canal Lighthouse Business Plan

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by 2008, visit the Lighthouse Keeper's Cottage, and learn about the canal, the light station and the history of Hamilton Beach.

PWGSC declared the land, on which the Lighthouse and Keeper's Cottage are located, surplus to the needs of the Department in 2004. The only respondent to the circulation of surplus property was DFO. DFO anticipated the transfer, and, as a result, BCLG worked closely with DFO for three years to prepare for the transfer of ownership of the land and buildings to the non-profit group. A part of the preparation by DFO for the transfer to BCLG was funding the entire cost of removing guano from the interior of the lighthouse and securing both buildings against entry and vandalism.

The land transfer from PWGSC to DFO was never concluded. In July 2007, PWGSC stated that they were not prepared to transfer ownership to a non public-sector group such as BCLG under any circumstances. Nor were they prepared to transfer the buildings to DFO for subsequent transfer to BCLG. However, it was stated that they would consider a licensing agreement, during which BCLG could carry out the restoration of the buildings.

The long-range plans for the harbour area proposed by the Hamilton Port Authority have included several potential development opportunities, such as commercial uses and marinas, for the area in the vicinity of the lighthouse. There also appears to have been a variety of options for management of the various components of that plan, including the Fisherman's Pier Development. This suggests that both private and public-sector agencies could be involved with various components of the development of the harbour and that there is an opportunity for integration of the Lighthouse and Keepers Cottage together with sufficient lands to support recommendations for an interpretive site.

The Lighthouse and Keepers Cottage are on lands within the city's municipal boundaries. The City of Hamilton is the owner of other heritage properties and has a history of successful heritage interpretive property operations. Transfer to the City of Hamilton may meet PWGSC's desire to only transfer the facilities to a public sector entity. It is therefore our recommendation that the most appropriate entity to take on the ownership of the Lighthouse and the Keeper's Cottage should be the City of Hamilton although consolidation of ownership under another public-sector agency remains a possibility. The extent of the lands required to support the operations of such a site are explored in later sections of this document.

Based on the above information, we recommend the following:

*It is recommended that negotiations be commenced as soon as possible between the City of Hamilton, the various elements within the federal government, and the Hamilton Port Authority in order to secure a clear title to the Beach Canal Lighthouse and the Keeper's Cottage including all access and parking for the facility, and, if the ultimate decision is to develop an Interpretive Centre on site (see Option 2 below) that the negotiations referred to above include sufficient space to provide for the establishment of an Interpretive Center of approximately 20,000 square feet total area and such parking as will be deemed to be necessary in accordance with the attendance projections offered in this study. Approximately 65,000 square feet of land would be required to fully service the needs of the site and accommodate parking and traffic requirements.*

## **Section 3**

### **Interpretive Potential**

With the high volume of traffic passing on the way to and from Niagara and the U.S. border, this site is an ideal location to display and interpret not only the Lighthouse and Keeper's Cottage, but also a much wider range of themes. Interpreting the Canal, the Lighthouse, life at the Lighthouse, and the industrial development of Hamilton harbour, as well as the unique residential community that has grown up over the past 200 years on the "beach strip," is only a part of the potential picture. Themes could include those of exploration, early settlement, war (the War of 1812 and the Hamilton and Scourge shipwrecks; war industry in both the First and Second World Wars), industrial development of Ontario and Canada, the development of transportation links, and many others.

The Province of Ontario is unique in Canada in not having a provincial museum to provide leadership and technical expertise that can be shared among smaller museums and historic sites in the province. There is no provincial facility in Ontario whose principal mandate is the interpretation, conservation and preservation of the material culture of the province. The telling of the history of Ontario, especially the post-European contact period, rests almost exclusively with the province's community museums. The story to be told at this site, therefore, could have provincial resonance in addition to local and national importance.

Thus, support at all levels of government for development of this site should be considered realistic and reasonable. Interpretation of the site can be done at a variety of levels:

- Interpret the Lighthouse and Keeper's Cottage as static artefacts using exterior signage and site access with only intermittent and limited tours of the interiors. Limited signage would be developed for interpretation of interiors. Such a scenario could be supported by a site-specific volunteer organization such as BCLG. This scenario would primarily showcase the buildings themselves while only touching on larger themes.
- Interpret the site, as above, but with more extensive development of interpretive materials that may include a broader story of the Beach Canal and its environs. This more ambitious program of interpretation should be supported by a greater level of access and may include a program of interpretive panels in the general vicinity of the site. An additional adjunct interpretive facility may be required at this level if volumes of visitation pose a risk to the Keeper's Cottage. Such a scenario would require, at a minimum, support from a larger agency than would be available from a purely volunteer organization.
- Interpret the site as above, but expand the site to include references to other attractions and sites in the local and Hamilton area. At this level, the site can both function as an interpretive centre and as a visitor centre, or gateway, to the larger community. It is at this point that supplementary facilities and land must be developed to avoid placing too much visitation burden on the relatively delicate heritage buildings. A gift shop and small visitor centre would appropriately serve as an adjunct to the two historic buildings.
- Interpret the site as above, but create a visitor centre that would have appropriate space for temporary exhibitions and curatorial services. As such, the site would serve as a multi-level attraction capable of attracting visitation for themed exhibits as well as tourists seeking information and those visiting to view the heritage site and canal operations.
- As above, but combined with commercial development of the general site as may be developed by the Hamilton Port Authority.

For this project to move forward successfully it is imperative to involve all stakeholder groups from the beginning of the planning process. It is particularly important to embrace potential projects similar to the (now abandoned) Fisherman's Pier Development Plan and to work closely with the Hamilton Port Authority in order to achieve the stated goal of the BCLG of having full access to the Lighthouse and Keeper's Cottage.

During the course of our writing this report, we developed several scenarios for the development of the site.

## Scenarios

The consultant's team presented a series of preliminary scenarios to the BCLG meeting on 14 May 2008. It is important to note that all scenarios presented here are based on the assumption that ownership of the two buildings would be transferred to the City of Hamilton. It is further assumed that the City would move forward with the interpreting these two buildings and use them to further tell the story of the history of the beach community and the industrial growth of the City of Hamilton focusing on the importance of the Harbour. The City of Hamilton has demonstrated its commitment to the interpretation of the history of the community through its various programs. The addition of this site would serve to further enhance this portfolio of important heritage properties and to make it available for public interpretation.

## Scenario 1

### **1a – Minimal Intervention and Investment, operating seasonally - Full Volunteer**

In this scenario, the site would become a small seasonal operation staffed totally by volunteers and operated on a reduced seasonal schedule – that is, during a short shoulder season and during the two summer months. Interpretation would be primarily of the buildings themselves. There would be no paid staff. In addition it is assumed that the site would be open for special community events, such as Doors Open, and offer special tours for pre-booked groups.

It is anticipated that this operation would have very little if any financial support from the City of Hamilton. Some modest grants and donations may be available to assist with the funding of special projects.

Annual visitation is projected at no more than 4000 visitors per year and the operating period is estimated to range anywhere from 3 to four months of scheduled access by the public. The annual operating budget is assumed to come entirely from self-generated revenues. It is estimated that to operate at this level, the annual budget will need to be in the range of \$17,000 to \$18,000.

Major drawbacks are the limitations imposed on the operation by reliance totally on volunteer labour, coordinated by volunteers. This is a no growth scenario with the future risk of neglected capital maintenance.

Public access would be limited to the Lighthouse at posted times and the main floor of the Keeper's Cottage. It is anticipated that the second floor of the Keeper's Cottage, and perhaps parts of the main floor, would be needed for support functions.

### **1 b – Minimal Intervention and Investment, operating seasonally - Volunteer with one part time paid staff**

In this scenario, the site would become a small seasonal operation staffed largely by volunteers with one City of Hamilton staff member partially responsible for the operation. The site manager's position is seen

# Beach Canal Lighthouse Business Plan

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as part time (1 FTE<sup>1</sup> @ 25%) and would be shared with other workloads within the City's heritage operation. In addition, two paid students could work for a total of 12-14 weeks during the summer months.

The season, in this option, would consist of 5 months general access—the beginning of June to the end of October. It is however assumed that pre-booked groups and special interest groups could gain access to the site for special events by making appointments in advance. In this scenario, the site would be open for less than the required 1080 hours per year (over 8 months) needed to qualify as a full time operation under the Ontario Ministry of Culture guidelines for full-time community based museums.

This operation is still viewed as minimal in function and programming and interpretation would remain primarily of the two heritage structures on the site. As a result of the close tie with the City and the other heritage operations within the corporation, a close working relationship would be expected in this and the subsequent options. This relationship should include some shared services, both museological and administrative. In addition it is assumed that joint marketing opportunities would be pursued with the other sister organizations which may expand the mandate.

This option relies heavily on volunteer labour for any special project initiatives and also calls for the use of volunteers in day-to-day operations of the site. It is anticipated that the annual operating budget would be in the range of \$65,000 with visitation in the area of 5,400 per year. The City of Hamilton contribution to this operation is projected at \$29,000 per year.

Public access would be limited to the hours of operation of the facility with both buildings being open to the public simultaneously during the summer months. It is anticipated that some shared service spaces may be made available to the site by the city. Such spaces would include the office space needed for the part-time manager.

No major building maintenance is anticipated as part of the operating costs of this scenario. Alternative or volunteer maintenance work would still be relied on.

## Scenario 2

### **Seasonal Operation in the existing buildings with one full-time and one part-time staff**

This scenario is based on one full time staff member assisted by one part time permanent staff position and further supported by one seasonal staff position. A strong volunteer reliance is still present not only in the area of providing public access to the site, but also in other areas of the operation, be it marketing or exhibit and interpretation operations.

With the added staff resources, particularly the introduction of a full time manager, this operation should see an improvement in the marketing of the site and provide a community visibility that will only come through direct contact with special interest groups and various marketing agencies such as tourist associations and travel groups.

The operation is still seasonal in nature with a limited number of hours of public access. However, as with the other scenarios, it is fully anticipated that access will be available in the off-season and off-hours of the standard operations timetable provided sufficient notification is made in advance.

The City's commitment to this operation is increased substantially, from \$29,000 to \$85,000 per year. However, the benefit of this increase rests in the improved professionalism of the operation. Although still considered part-time (under the Ontario Ministry of Culture guidelines for community museums), the operation has the potential of a considerably broadened interpretive base resulting in more than doubling

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<sup>1</sup> FTE = Full time employee

the annual attendance figures from an estimated 5,500 to almost 12,000. This increase in attendance is further projected to result in an equally dramatic increase in self-generated revenues through core activities such as admissions and special events revenue.

The Lighthouse and Keeper's Cottage would be open for full public access during the hours of operation. For this option it is recommended that parts of the ground floor of the Keeper's Cottage serve as interpretive center for the two buildings and it may be possible to use part of the space as a small gift shop. Interpretation of the greater site and region could be done here in a modest manner although constrained by the limitations of space. Additional support space, especially as it relates to off-season space for staff, would need to be supplied by the City.

## Scenario 3

### **Year round operation in the existing buildings with staff**

Under this scenario the site reaches a level of professional maturity enjoyed by the other heritage sites managed by the City of Hamilton. The Lighthouse and Keeper's Cottage would be open to the public on a year round basis and employ a full-time Manager and three half time (0.5 FTE x 3) staff comprised of an education and program officer, an administrative support person and a maintenance technician, for a total of 2.5 FTEs. In addition to this complement it is recommended that two seasonal staff be engaged to allow for wider interpretation of the site during the summer months and to permit some core staff absenteeism for holidays during the summer.

As is the case with almost all small community museums in this province, a continued reliance on volunteers is essential for the success of the various programs that may be offered. These volunteers can be drawn, in the first instance, from the existing group of dedicated volunteers.

The site is, in this scenario, open well over the minimum requirements for a full-time museum as defined by the Ontario Ministry of Culture and would have at least one full-time dedicated staff member (Manager/Curator). This would qualify the site for membership in the provincial Community Museum Operating Grant program (CMOG).

The City of Hamilton's annual contribution to this site is projected at approximately \$120,000.

In a manner similar to the previous option, both the Lighthouse and Keeper's Cottage would be open to the public at all times when the site is open. This scenario will require off-site support facilities, supported by the city, as the Keeper's Cottage is not capable of supporting all administrative functions needed to operate a full time operation. It is recommended that the Manager/Curator be located off-site with the administrative assistant and that such functions as booking of tours and programme development also be done off-site. A location within the City Centre complex for these functions would need to be found. The interpretive mandate would be enlarged, within constraints posed by the site, by the provision of support facilities off-site. At this level, a small separate interpretive building, kiosk or trailer might be considered to provide support space during the busiest periods – for this to take place, appropriate space must be acquired on site by lease, loan or purchase.

It is noted that this option, although meeting the immediate needs of having the site preserved, opened to the public and operated on a professional footing, will have limits to growth, which are reflected both in the visitor projections and in the financial growth projections. In addition, this option puts considerable pressure on the Keeper's Cottage by having it double up in use as an interpretive centre that may be at odds with the preservation objectives. As well, the buildings themselves will have limited attraction to the public as a result of their size and limited programming opportunities. We do however, with the consensus of the study committee, recommend further investigation of this Option as the minimum manner in which to advance the interests of this site.

## Scenario 4

### 4a - Interpretive Center operating year round functioning as a site-specific centre

To fully interpret the Canal, the Lighthouse, life at the Lighthouse and the industrial development of Hamilton harbour as well as the unique residential community that has grown up over the past 200 years on the “beach strip”, it is recommended that consideration be given to the construction of an interpretive center in close proximity to the Lighthouse. Although this scenario is the one that will provide the greatest benefit to the community and the full understanding of the exciting history surrounding this area of the City, it is also recognized as the most ambitious.

The detailed needs assessment of an interpretive center is presented in Appendix D of this report. Such a center should be in the range of 8,000 to 10,000 sq. feet and follow closely the guidelines recommended for such construction by the Ontario Ministry of Culture. In general terms, this would indicate that exhibition spaces within the center would provide for approximately 1,500 square feet of permanent exhibits with a similar amount of space dedicated to revolving or temporary exhibitions that could, from one year to the next, focus on a variety of specific themes dealing with the development of Hamilton’s harbour. The remainder of the space would be dedicated to support functions centering on the Lighthouse and Keeper’s Cottage. In the event of this option being implemented, it would be further recommended that the Keeper’s Cottage be fully dedicated to the display of daily life by the keeper and his family with the Lighthouse remaining as a fully restored structure, both interior and exterior.

An Interpretive Centre should include a number of visitor services that will help to enhance the heritage experience including revenue-generating centres such as a gift shop and a food service area. It has been demonstrated that quality food services included within heritage sites and museums can do very well at the upper end of the spectrum (i.e. Museum London, City of London, ON has a very successful restaurant within its building as does the Art Gallery in Oshawa). A gift shop area could offer an array of lighthouse souvenirs, nautical gifts, lighthouse books, jewellery, branded clothing, posters, children's corner and more. This store could be operated by the part-time staff supported by volunteers and in the initial stages be located in the renovated Keeper’s Cottage with proceeds used to support area heritage programs and new exhibits. It would become a destination for unique, quality gifts, especially for lighthouse tourists and collectors. Within the option of a full interpretive centre, this function should be expanded considerably in order to provide a large segment of the travelling public with more options.

Public access to the Lighthouse and Keeper’s Cottage would remain a priority. With the Interpretive center located within easy reach of these two buildings, there would be no need for off-site support spaces to be made available for the operation.

This scenario calls for a full time manager, administrative assistant/receptionist and a full time museum technician/maintenance person. In addition to these it is recommended that a part-time Programming/Education Officer be on staff to assist in the development and delivery of public programming initiatives. It is also recommended that this option include three seasonal staff employed full time for a period of at least 14 weeks per year. One of the challenges of this option is that three buildings need to remain open to the public during opening hours. With good planning and a sensible design/location of the interpretive center, staffing needs may be able to be situated in such a way that indirect oversight can be provided for the buildings. However, the need for volunteer staff remains strong with this option as it does with others.

It is anticipated that this option will require an operating budget of just over \$410,000 with an estimated annual contribution from the City of \$163,000. The total visitation for the year, in year one of this operation, is estimated at approximately 36,000.

Further development of option 4 suggests that a more comprehensive plan provides a better return on investment for the heritage community in Hamilton. This further investigation is presented as Option 4-b.

## **4b - Interpretive Center operating year round, functioning as a Multiple Museum Complex**

This scenario includes the full time interpretive center concept with the added function of having a number of special interest groups included within the center's perimeter. This concept is approaching what can best be described as a "Heritage Condominium". An example would be the Ontario Heritage Centre in Toronto which is owned and operated by the Ontario Heritage Trust but is also occupied by other not-for-profit groups such as the Architectural Conservancy of Ontario and the Black History Society. The central feature of this proposal rests with the need for a lead organization to own the center and then administer it within the general mandate. We have outlined the scope of the interpretive centre.

### **Concept for a Multiple Museum Complex**

This concept consists of a museum complex that will provide professional space for all partners and is viewed as a vital element that could also provide some support services for the existing heritage sites owned and operated by the City of Hamilton. In addition to service faculties for these sites, the centre would also be in a position to provide a small exhibition footprint for the other sites and lead to further serving the heritage community as a "point of entry" for the City's cultural tourists. Currently, this interpretive potential, whether viewed as a quality of life issue for local residents or a major tourism draw, could contribute to the stability of the cultural services sector in Hamilton.

The model presented here is expandable to permit the inclusion of a wide variety of museum concerns including those that have mandates relating to specific historic sites located throughout the City of Hamilton. It is recognized that, while other sites in current operation are typically site specific, over time this proposed centre could take on the role of a full curatorial centre for all the other sites and act as a coordinating facility that may be in a position to reduce some of the stress currently experienced by the other historic sites in areas such as collections storage, curatorial outreach and community research.

The concept outlined here would further enhance the function of all of the heritage sites operated by the City and assist in the meeting of the needs of the Beach Canal Lighthouse in an aggressive and comprehensive manner.

Museums and historic sites should not be seen as stand-alone facilities, but viewed as part of the quality of life components that are so vital for a dynamic community wishing to provide its residents and visitors with a "value added" experience within the municipal boundaries.

### **The Shared Museum Complex**

The shared museums complex would have a number of unique services to provide not only to the sites included in the City of Hamilton's heritage portfolio, but all of the participating organizations that will take part in this complex including the Beach Canal Lighthouse.

### **Space Allocation**

We have outlined the space allocation for such a proposed Interpretive Centre Facility as follows:

#### **Reception and Orientation Area**

This space would accommodate the principal lobby and reception counter. It would include an orientation gallery, which would familiarize the visitor with the mandates of all partners as well as give directions to off site facilities that are part of the partnership. For example, a small exhibit dedicated to each of the various city sites would be accommodated in this space that would give the highlights of each site and provide details of "how to get there – from here".

In addition, direction would be provided to exhibits within the buildings. These exhibits would be seen as permanent with relatively little changes except in areas of event notification. The Reception/Orientation area would also be the location for any “donor recognition” systems that may be developed as the result of capital and endowment campaigns that may be undertaken.

### **Shared Audio-Visual and Meeting Space**

A small theatre (85 to 125 seats) would be used for the general introduction of the facility, the community and its heritage. This space would be versatile and flexible. The space would be primarily designed as an audio-visual centre; it should be able to function as a lecture hall and venue for film showings. It is not seen as a fully equipped performing arts centre although it may be provided with facilities to accommodate musical performances.

### **Shared Temporary Exhibition Gallery**

This gallery would be available to all partners on a rotational basis and would provide a venue for special events such as receptions and travelling exhibitions. The space is seen as occupying approximately 1,200 square feet.

### **Shared Curatorial Space**

By far the largest single space allocation for this facility would be that dedicated to Curatorial functions such as collections storage for all partners. Those partners who operate off site facilities would have their primary support spaces at the centre including reserve collections storage, joint cataloguing facilities and such functions as exhibition design, label production and photography. This space would also accommodate the archival collection of all partners in a single facility. It is anticipated that this would result in savings from economy of scale and permit a single staff (paid or un-paid) to administer this centralized archival collection.

There may be some areas that will have to be resolved in order to keep ownership issues satisfactory to all partners. It is important in this scenario, however, to maintain a focus on economy of scale, safety of collections and customer service whether those “customers” be staff or members of the general public.

Collections storage spaces can be provided for within a single framework respecting the areas of individual institutional ownership of specific items. A collections management system providing for this differentiation should be developed. A large storage space can be subdivided using barriers that would permit the even flow of air movement and yet provide the needed individual institutional security that may be required to maintain single institutional accountability.

This area would also include staff entrance, shipping and receiving, object isolation areas, conservation workrooms, exhibition workshop, building maintenance shop, crate storage area and a waste disposal room.

### **Partner Galleries**

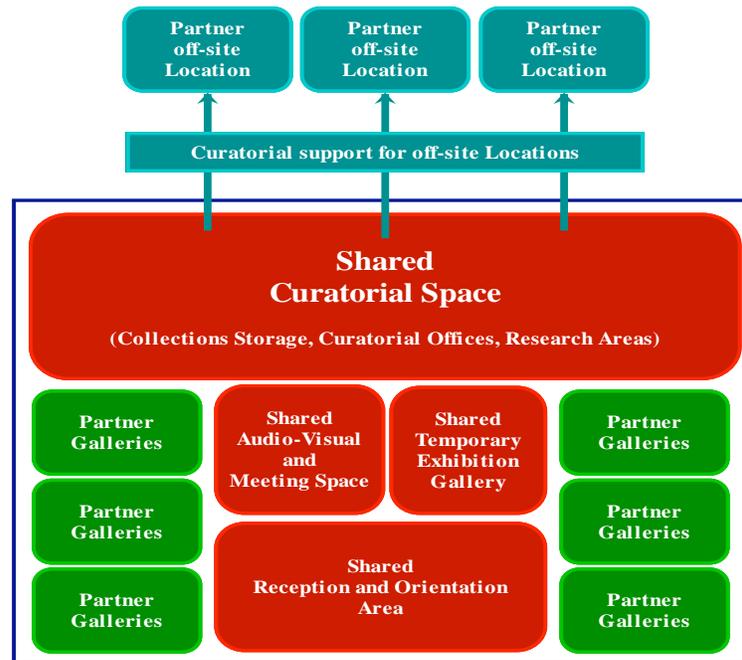
Each partner would be assigned gallery space particular to the mandate of the partner. These spaces would reflect the collection needs and be under the control of the specific partner but would need to adhere to a jointly agreed set of design specifications. One of the key challenges of this concept is to ensure that a common feel and unified “branding” is maintained as the visitor moves from one partner gallery to the next.

Designs Specifications will need to address such issues as:

<b>Labelling systems:</b>	Size, shape and text fonts for object labels, contextual panels and general item labels.
<b>Colours:</b>	Complementary colour charts including labels, case backgrounds and walls

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- Exhibition furniture:** Mounts, cases and platforms.
- Lighting:** Fixture type, illumination levels, fixture locations
- Floor Covering:** Textures and colours as well as material choices



## Governance of Multiple Museum Complex

The governance model proposed for the Multiple Museum Complex, whether located in a new purpose-built structure or a recycled heritage building, would remain the same.

The City of Hamilton would be seen as the senior partner and the site governed within the framework of the city and its heritage enterprises. However, should “outside agencies” be included in this concept it becomes important to give them a voice in the management of the centre. However, with the majority of the effort in the development of this centre concept, the City would be the key leader.

Other participants in the Multiple Museum Complex should be encouraged to take part in an advisory committee to the City with the specific mandate centring on the operational efficiencies of the Complex.

This option would require a staff complement consisting of five FTEs: a Manager, Programming Officer, Administrative Support person, and two Technician/Maintenance persons. Annual visitation is estimated at 45,000 and the City of Hamilton’s annual contribution to calculated to be in the range of \$226,000.

## Summary of Scenarios

Detailed analysis of revenues and attendance for each of the above scenarios is provided below. After looking at all of these scenarios, we narrowed down the scenarios into two recommended options.

Option 1 (which stems from scenario 3) is a year round operation within the existing buildings with a number of paid staff.

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Option 2 (which stems from scenario 4a) is a year round operation with the introduction of a separate purpose built building for an interpretive centre which would focus on the Beach Canal Lighthouse site.

Attendance Projections (Year One)	Mo	Scenarios					
		1a	1b	2	3	4a	4b
JAN	0	0	0	200	1,000	2,000	
FEB	0	0	0	200	1,500	2,500	
MAR	0	0	0	300	2,000	3,000	
APR	0	0	0	500	2,500	3,500	
MAY	0	0	1,000	1,000	3,000	4,000	
JUN	400	500	1,500	2,000	3,500	4,000	
JUL	1,500	2,000	4,000	6,000	7,500	8,500	
AUG	1,500	2,000	4,000	6,000	7,500	8,500	
SEP	400	500	1,500	2,000	3,000	4,000	
OCT	0	250	1,000	1,000	2,000	3,000	
NOV	100	0	0	700	1,000	1,000	
DEC	100	0	0	1,500	1,500	2,000	
<b>TOT</b>		<b>4,000</b>	<b>5,250</b>	<b>13,000</b>	<b>21,400</b>	<b>36,000</b>	<b>46,000</b>

Note: the Ontario Ministry of Culture definition for CMOG applicants as a "Full Time Museum" requires a site to be open to the public for a minimum of 1,080 hours per year during a minimum of 8 months in that year and must have a minimum of one person working full-time as the site curator or manager.

A seasonal operation is anything less than these requirements

INCOME SUMMARY	Scenarios					
	1a	1b	2	3	4a	4b
1 Brought Forward	0	0	0	0	0	0
2 Core Activities	16,600	23,110	55,850	90,710	160,400	201,750
3 Donations	1,200	3,000	4,000	6,000	9,000	12,500
4 Endowments and Trusts	0	0	0	0	0	0
5 Gift Shop	200	3,160	7,900	17,800	48,000	49,500
6 Municipality	0	29,000	85,000	120,000	163,000	226,000
7 Rent	0	0	0	0	1,000	20,000
8 Grant - Province of Ontario (CMOG)	0	3,000	10,000	15,000	20,000	25,000
9 Grant - Federal	0	4,500	3,200	6,500	9,000	12,000
<b>TOTAL MUSEUM INCOME</b>	<b>18,000</b>	<b>65,770</b>	<b>165,950</b>	<b>256,010</b>	<b>410,400</b>	<b>546,750</b>

EXPENSE SUMMARY	Scenarios					
	1a	1b	2	3	4a	4b
10 Salaries and Benefits	0	38,880	126,880	195,280	260,280	359,280
11 Conservation	200	800	1,000	2,200	4,200	5,700
12 Curatorial	1,100	1,300	2,200	4,800	8,300	8,800
13 Outreach	200	1,500	3,400	4,500	10,300	11,800
14 Marketing and Communication	3,250	5,400	6,600	8,900	27,500	28,000
15 Acquisitions	0	800	900	900	1,000	1,400
16 Displays	1,400	2,700	2,700	4,500	10,500	14,500
17 Building Maintenance	8,300	8,300	8,800	9,500	28,900	38,400
18 Gift Shop	200	3,160	7,900	17,800	48,000	49,500
19 Administration	1,700	2,800	5,400	6,700	11,300	29,000
<b>TOTAL MUSEUM EXPENSES</b>	<b>16,350</b>	<b>65,640</b>	<b>165,780</b>	<b>255,080</b>	<b>410,280</b>	<b>546,380</b>
Salary costs as a percentage of total op. costs		59	77	77	63	66
<b>TOTAL - Surplus / (-Deficit)</b>	<b>1,650</b>	<b>130</b>	<b>170</b>	<b>930</b>	<b>120</b>	<b>370</b>

# Beach Canal Lighthouse Business Plan

DETAILED REVENUE	Note	Scenarios					
		1a	1b	2	3	4a	4b
<b>1 Brought Forward</b>							
Brought Forward		0	0	0	0	0	0
<b>1 TOTAL Brought Forward</b>							
<b>2 Core Activities</b>							
Admission Revenue		16,600	22,410	53,950	88,810	149,400	186,750
Special Program Revenue		0	700	1,900	1,900	11,000	15,000
<b>2 TOTAL Core Activities</b>		16,600	23,110	55,850	90,710	160,400	201,750
<b>3 Donations</b>							
Individual (Donation Box)		500	1,500	2,000	2,500	3,000	4,500
Individual (General)		500	1,000	1,000	1,500	2,000	3,000
Corporate		200	500	1,000	2,000	4,000	5,000
<b>3 TOTAL -Donations</b>		1,200	3,000	4,000	6,000	9,000	12,500
<b>4 Endowments and Trusts</b>							
Endowments		0	0	0	0	0	0
Trusts		0	0	0	0	0	0
<b>4 TOTAL Endowments and Trusts</b>		0	0	0	0	0	0
<b>5 Gift Shop</b>							
Giftware		0	1,000	2,500	5,000	15,000	18,000
Books		0	1,600	4,000	8,000	25,000	30,000
Consignment Sales		0	2,000	5,000	12,000	30,000	30,000
<b>5 TOTAL -Gift Shop</b>		0	4,600	11,500	25,000	70,000	78,000
<b>6 Municipality -</b>							
Operating Contribution - City of Hamilton		0	29,000	85,000	120,000	163,000	226,000
Municipal Grant (other)							
<b>6 TOTAL Municipality</b>		0	29,000	85,000	120,000	163,000	226,000
<b>7 Rent</b>							
Special Events		0	0	0	0	500	10,000
Community Groups		0	0	0	0	500	10,000
<b>7 TOTAL - Rent</b>		0	0	0	0	1,000	20,000
<b>8 Grant - Province of Ontario (CMOG)</b>							
CMOG		0	3,000	10,000	15,000	20,000	25,000
Misc. Provincial Grants		0	0	0	0	0	0
<b>8 TOTAL - Grant, Province of Ont.</b>		0	3,000	10,000	15,000	20,000	25,000
<b>9 Grant - Federal</b>							
Student Wage Subsidy (Cdn Wks)		0	4,500	3,200	6,500	9,000	12,000
<b>9 TOTAL - Grants - Federal</b>		0	4,500	3,200	6,500	9,000	12,000
<b>TOTAL REVENUE</b>		<b>17,800</b>	<b>67,210</b>	<b>169,550</b>	<b>263,210</b>	<b>432,400</b>	<b>575,250</b>

# Beach Canal Lighthouse Business Plan

## DETAILED EXPENSES

Note	Scenarios					
	1a	1b	2	3	4a	4b
<b>10 Salaries and Benefits</b>						
Director/Curator/Manager (1 FTE=\$68,000)	0	18,000	68,000	68,000	68,000	68,000
Programming Officer (1 FTE=\$45,000)	0	0	0	22,500	22,500	45,000
Adm. Support/Gift Shop Staff (1 FTE=\$40,000)	0	0	20,000	20,000	40,000	40,000
Technician/Maintenance (1 FTE=\$45,000)	0	0	0	22,500	45,000	90,000
Core staff Benefits (@ 36%)	0	6,480	31,680	47,880	63,180	87,480
Seasonal Staff (1 pers x 400 hrs @ \$15.00/hr)	0	12,000	6,000	12,000	18,000	24,000
Seasonal Staff Benefits (@ 20%)	0	2,400	1,200	2,400	3,600	4,800
<b>10 TOTAL - Salaries and Benefits</b>	<b>0</b>	<b>38,880</b>	<b>126,880</b>	<b>195,280</b>	<b>260,280</b>	<b>359,280</b>
<b>11 Conservation</b>						
Supplies and Materials	100	300	500	1,000	2,000	2,500
Equipment	0	400	400	1,000	2,000	3,000
Miscellaneous Conservation	100	100	100	200	200	200
<b>11 TOTAL - Conservation</b>	<b>200</b>	<b>800</b>	<b>1,000</b>	<b>2,200</b>	<b>4,200</b>	<b>5,700</b>
<b>12 Curatorial</b>						
Supplies	200	400	500	1,500	3,000	3,000
Meetings/Conferences	300	300	500	1,200	2,000	2,500
Specific Professional Supplies	200	200	600	1,000	1,500	1,500
Travel	200	200	400	800	1,500	1,500
Miscellaneous Curatorial	200	200	200	300	300	300
<b>12 TOTAL - Curatorial</b>	<b>1,100</b>	<b>1,300</b>	<b>2,200</b>	<b>4,800</b>	<b>8,300</b>	<b>8,800</b>
<b>13 Outreach</b>						
Events and Activities	0	500	1,000	1,500	4,000	5,000
Community Outreach	0	500	1,400	2,000	4,000	4,500
Education Program supplies	0	300	700	700	2,000	2,000
Miscellaneous - Outreach	200	200	300	300	300	300
<b>13 TOTAL - Outreach</b>	<b>200</b>	<b>1,500</b>	<b>3,400</b>	<b>4,500</b>	<b>10,300</b>	<b>11,800</b>
<b>14 Marketing and Communications</b>						
Brochures, Posters, Flyers	2,000	4,000	5,000	6,000	20,000	20,000
In-house orientation Printing	500	500	500	1,000	3,000	3,000
Advertising - Print, Radio, TV.	600	600	800	1,500	3,500	4,000
Miscellaneous - Advertising	150	300	300	400	1,000	1,000
<b>14 TOTAL - Marketing and Communication</b>	<b>3,250</b>	<b>5,400</b>	<b>6,600</b>	<b>8,900</b>	<b>27,500</b>	<b>28,000</b>
<b>15 Acquisitions</b>						
Purchases	0	0	0	0	0	0
Customs, Duty, Taxes	0	0	0	0	0	0
Transportation, Shipping	0	500	500	500	600	1,000
Appraisals	0	200	300	200	200	200
Miscellaneous - Acquisitions	0	100	100	200	200	200
<b>15 TOTAL - Acquisitions</b>	<b>0</b>	<b>800</b>	<b>900</b>	<b>900</b>	<b>1,000</b>	<b>1,400</b>
<b>16 Displays</b>						
Permanent - Construction, Fabrication	500	500	500	1,000	3,000	5,000
Temporary - Construction, Fabrication	200	500	500	500	3,000	4,000
Offsite Exhibits	0	500	500	1,000	1,500	2,000
Photography, text panels, etc.	500	1,000	1,000	1,500	2,000	2,500
Miscellaneous - Displays	200	200	200	500	1,000	1,000
<b>16 TOTAL - Displays</b>	<b>1,400</b>	<b>2,700</b>	<b>2,700</b>	<b>4,500</b>	<b>10,500</b>	<b>14,500</b>
<b>17 Building Maintenance</b>						
<b>Lighthouse</b>						
Routine Repairs and Maintenance	1,000	1,000	1,000	1,000	1,500	1,500
Utilities	500	500	500	500	500	500
Janitorial Supplies and Maintenance	200	200	200	200	200	200
Grounds Maintenance	200	200	200	300	400	400
Security Systems (Monitoring)	250	250	250	250	250	250
HVAC Service Agreements	250	250	250	250	250	250
Taxes	0	0	0	0	0	0
Insurance (Property, Liability & Equipment)	600	600	600	600	800	800
Miscellaneous - Lighthouse	100	100	100	100	100	100
<b>SUB-TOTAL - Lighthouse</b>	<b>3,100</b>	<b>3,100</b>	<b>3,100</b>	<b>3,200</b>	<b>4,000</b>	<b>4,000</b>
<b>Keeper's Cottage</b>						
Routine Repairs and Maintenance	1,500	1,500	1,500	1,500	1,500	1,500
Utilities	800	800	1,000	1,200	1,500	1,500
Janitorial Supplies and Maintenance	300	300	500	800	1,000	1,000
Grounds Maintenance	800	800	800	800	800	800
Security Systems (Monitoring)	300	300	300	400	400	400
HVAC Service Agreements	400	400	500	500	600	600
Taxes	0	0	0	0	0	0
Insurance (Property, Liability & Equipment)	800	800	800	800	800	800
Miscellaneous - Keeper's Cottage	300	300	300	300	300	300
<b>SUB-TOTAL - Keeper's Cottage</b>	<b>5,200</b>	<b>5,200</b>	<b>5,700</b>	<b>6,300</b>	<b>6,900</b>	<b>6,900</b>

# Beach Canal Lighthouse Business Plan

## DETAILED EXPENSES (Cont.)

	Note	Scenarios					
		1a	1b	2	3	4a	4b
<b>Interpretive Center</b>							
Routine Repairs and Maintenance		0	0	0	0	2,000	3,500
Utilities		0	0	0	0	8,000	12,000
Janitorial Supplies and Maintenance		0	0	0	0	1,000	2,000
Grounds Maintenance		0	0	0	0	2,000	2,500
Security Systems (Monitoring)		0	0	0	0	500	1,000
HVAC Service Agreements		0	0	0	0	1,500	2,000
Taxes		0	0	0	0	0	0
Insurance (Property, Liability & Equipment)		0	0	0	0	2,500	3,500
Miscellaneous - Keeper's Cottage		0	0	0	0	500	1,000
<b>SUB-TOTAL - Keeper's Cottage</b>		<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>18,000</b>	<b>27,500</b>
<b>17 TOTAL - Building Maintenance</b>		<b>8,300</b>	<b>8,300</b>	<b>8,800</b>	<b>9,500</b>	<b>28,900</b>	<b>38,400</b>
<b>18 Gift Shop</b>							
Merchandise for re-sale (50%)		0	500	1,250	2,500	7,500	9,000
Books for re-sale (60%)		0	960	2,400	4,800	15,000	18,000
Consignment Sales (Pay back-75%)		0	1,500	3,750	9,000	22,500	22,500
Gift Shop Supplies		200	200	500	1,500	3,000	0
<b>18 TOTAL - Gift Shop</b>		<b>200</b>	<b>3,160</b>	<b>7,900</b>	<b>17,800</b>	<b>48,000</b>	<b>49,500</b>
<b>19 Administration</b>							
Office Supplies		300	300	800	1,200	2,500	3,000
Office Equipment Service Agreements		0	0	500	500	1,000	1,000
Postage		200	500	600	800	1,500	18,000
Telephone		800	800	1,000	1,000	1,500	1,600
Internet Charges		0	0	500	500	500	500
Accounts and Audits		250	500	1,000	1,500	2,500	3,000
Bank Charges		50	200	300	400	500	600
Institutional Memberships		0	300	500	500	800	800
Miscellaneous - Maintenance		100	200	200	300	500	500
<b>19 TOTAL - Administration</b>		<b>1,700</b>	<b>2,800</b>	<b>5,400</b>	<b>6,700</b>	<b>11,300</b>	<b>29,000</b>
<b>20 Bring Forward</b>							
Surplus (-Deficit)		1,650	130	170	930	120	370
<b>20 TOTAL - Bring Forward</b>		<b>1,650</b>	<b>130</b>	<b>170</b>	<b>930</b>	<b>120</b>	<b>370</b>
<b>TOTAL - EXPENSES</b>		<b>16,350</b>	<b>65,640</b>	<b>165,780</b>	<b>255,080</b>	<b>410,280</b>	<b>546,380</b>
<b>TOTAL - REVENUE</b>		<b>18,000</b>	<b>65,770</b>	<b>165,950</b>	<b>256,010</b>	<b>410,400</b>	<b>546,750</b>
<b>Surplus (Deficit)</b>		<b>1,650</b>	<b>130</b>	<b>170</b>	<b>930</b>	<b>120</b>	<b>370</b>

## **Section 4**

### **Marketing Opportunities**

#### **Introduction**

A standard definition of **Strategic Marketing** is the process of planning and executing the conception, pricing, promotion, and distribution of ideas and services to create exchanges that satisfy individual, public and organizational goals. It must always maintain a balance between the objectives of the facility and changes in market opportunities (including competition).

Marketing should not be an afterthought. Too many cultural and heritage organizations relegate marketing to this status, confusing it with promotion, which is only one of its components. Service launches, special events, and education programs are often completely planned before marketing is even considered. Typically, the issues within the heritage community related to marketing and advertising are typically so far below industry standards that marketing is frequently ineffective with funds spent unwisely. We recommend that appropriate budgets are made available to market the site once the project is implemented.

#### **Stakeholders should plan ahead, with a long-term approach to marketing the new site.**

As noted in the introduction to this report, the Beach Canal Lighthouse site is in a unique position both culturally and geographically. The history and interpretive opportunities contained within a few thousand square feet are remarkable. The current development of the surrounding waterfront areas is yet another major area of strength for this site. For example, the move to bring residents to the downtown area in the neighbouring City of Burlington through the construction of high-rise condominiums will bring high-density neighbourhoods within close proximity to this site. This increase in the numbers of relatively affluent residents will provide recreational and cultural opportunities for heritage sites such as the Beach Canal Lighthouse and an associated interpretive centre, which could offer the visiting public options of interest.

The Burlington Skyway vehicular traffic volume is now over 330,000 average workday trips; in peak summer hours that traffic flow could be a primary market focus for a renovated lighthouse 'Centre'. Signage would have to be provided on major arterial roads and the highway indicating the direction to the Lighthouse. Signs should be placed in such a manner as to direct the tourist (and the residents of the area) not only from the main highways, but also from within the municipal boundaries of both the Cities of Hamilton and of Burlington<sup>1</sup>.

However, the Lighthouse, although an important site and worthy of preservation and public access on its own, will not have the ability to attract visitors in significant numbers. Diverting a minimum of 500 visitors daily in peak tourism season should, however, be considered as a target. This represents only .0015% of the traffic volume passing the site. The challenge will be how to do this and what "value added" attraction can be provided to extend the visit to something more than a single point of interest. An opportunity exists for this site to act as a "Gateway" to Hamilton in general and its heritage attractions in particular.

#### **General Marketing Facts and Figures**

The Golden Horseshoe region with a population of approx. 8.1 million (25% of Canada's total) has Hamilton as the 'forward cleat' in the inner ring (total inner ring pop. 6.5). The TAMS estimate of the total heritage tourist population (over 18 yrs.) in Canada is 3 million, with 750,000 (again 25%) within the 2-3 hour drive to the access point of the Lighthouse. A three percent annual visitation rate (20,000 - 25,000) should be possible.

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<sup>1</sup> Signage on Provincial highways is controlled and managed by a private sector firm. Annual fees for direction signage would have to be included in the marketing budget.

# Beach Canal Lighthouse Business Plan

Tourism is currently Ontario's fifth largest export industry and is projected to become the fourth largest in the near future. Of the \$47.3 billion (1998) of tourism spending in Canada, \$11.5 billion was spent in Ontario. Expenditures in the Niagara region and Toronto were about \$2.1 billion and \$2.8 billion respectively.

Forecasted tourism visitations to the Niagara area range from about 22 million to upwards of 40 million, depending upon the investment level made in tourist facilities.

The Niagara Peninsula area acts as an international trade and tourism gateway between the Greater Toronto Area, and south western Ontario and the United States. Some 120 million people and major markets lie within 500 kilometres of the Peninsula.

As indicated in IBI's 2004 *Fisherman's Pier Marketing Opportunities Report*, the key land uses within Fisherman's Pier South would have included Piers 24, 25, 26 and 27, the lift bridge on Eastport Drive, the Hamilton Beach neighbourhood that includes residential dwellings and some small commercial/retail establishments, the Bell Cairn Training Centre, Windermere Basin, the Museum of Steam and Technology and a number of industrial operations. This Hamilton Port Authority funded report also included many tourism-driving factors in the area, including navigational usage facilities including the Lift Bridge and the Lighthouse site itself.

## DEMOGRAPHICS – CANADIAN HERITAGE TOURISTS

### Gender, Age, Education and Income

Demographic profiles of 3 activity segments are presented below and the various characteristics are compared among the three market segments. These are contrasted with the total Canadian population. As a summary, a demographic profile of each activity market segment is provided.

Demographic Characteristics - Canadian Adults					
ADULTS, 18+	TOTAL	ARTS TOURISTS	HERITAGE TOURISTS	ECO- TOURISTS	ANY SEGMENT
IN MILLIONS	23.3	1.6	<b>3.0</b>	2.2	4.9
UNWEIGHTED BASE SIZE	(18,385)	(540)	<b>(1,049)</b>	(669)	(1,592)
GENDER:	?	?	?	?	?
MEN	49 %	43 %	<b>48 %</b>	44 %	47 %
WOMEN	51 %	57 %	<b>52 %</b>	56 %	53 %
AGE:	?	?	?	?	?
18 - 24 YEARS	12 %	13 %	<b>10 %</b>	14 %	12 %
25 - 34 YEARS	19 %	20 %	<b>16 %</b>	25 %	20 %
35 - 44 YEARS	23 %	19 %	<b>24 %</b>	24 %	23 %
45 - 54 YEARS	18 %	18 %	<b>22 %</b>	19 %	20 %
55 - 64 YEARS	12 %	15 %	<b>18 %</b>	11 %	15 %
65+ YEARS	16 %	14 %	<b>11 %</b>	8 %	12 %
AVERAGE AGE (18+)	45 YEARS	44 YEARS	<b>45 YEARS</b>	41 YEARS	44 YEARS

## Beach Canal Lighthouse Business Plan

EDUCATION:	?	?	?	?	?
SOME SECONDARY	20 %	5 %	<b>8 %</b>	6 %	7 %
COMPLETED SECONDARY	26 %	16 %	<b>21 %</b>	18 %	20 %
SOME POST SECONDARY	36 %	41 %	<b>44 %</b>	43 %	43 %
UNIVERSITY GRADUATE	18 %	38 %	<b>27 %</b>	33 %	30 %
ANNUAL HOUSEHOLD INCOME:	?	?	?	?	?
UNDER \$60,000	70 %	59 %	<b>55 %</b>	62 %	59 %
\$60,000 - \$99,999\$	21 %	25 %	<b>31 %</b>	25 %	28 %
\$100,000+	9 %	16 %	<b>14 %</b>	13 %	14 %
AVERAGE HOUSEHOLD INCOME ('98)	\$50,000	\$59,000	<b>\$61,000</b>	\$56,000	\$59,000
SOURCE: HERITAGE CANADA & TAMS. NOTE: TOTAL COLUMN IS BASED ON FULL SAMPLE OF CANADIAN ADULTS. MARKET SEGMENT GROUPS ARE BASED ON A REDUCED SAMPLE OF THOSE WHO COMPLETED THE SURVEY.					

The most salient differences in gender, age, education and income vis-à-vis the general public for each activity market segment are highlighted below.

- **Arts tourists** are over-represented among women (57%), university graduates (38%), and those with household incomes of at least \$100,000 (16%).
- Possibly because it is the largest segment, **Heritage tourists** have more in common with the Canadian population at large on key demographic characteristics than do members of the **arts** and **Ecotourist** segments. **Heritage tourists** are almost evenly divided between men and women. They are concentrated in the 45 to 65 year old age group (40%). These Canadians have more formal education than does the general public.
- **Ecotourists** are also likely to be women (56%) but unlike **Arts tourists**, those with a special interest in the outdoors are concentrated at the young end of the age spectrum. Two-fifths of them are between the ages of 18 and 34 years. Because of their relative youth, **Ecotourists** are less apt than **Arts tourists** to have completed university.

## Household Size and Composition

Both **arts** and **Ecotourists** are more likely to live in adult-only households than Canadians in general. For **Arts tourists**, the explanation likely derives from their older ages - they may be empty nesters. In the case of **Ecotourists**, the absence of children/teens in the household is likely a function of their youth.

Household Composition - Canadian Adults					
ADULTS, 18+	TOTAL	ARTS TOURISTS	HERITAGE TOURISTS	ECO- TOURISTS	ANY SEGMENT
IN MILLIONS	23.3	1.6	<b>3.0</b>	2.2	4.9
UNWEIGHTED BASE SIZE	(18,385)	(540)	<b>(1,049)</b>	(669)	(1,592)
AVERAGE HH SIZE	2.8	2.2	<b>2.5</b>	2.5	2.5
ALL HH MEMBERS 18+	66 %	79 %	<b>68 %</b>	73 %	71 %
ANY CHILDREN/TEENS	34 %	21 %	<b>32 %</b>	27 %	29 %
THOSE WITH ANY CHILDREN:	?	?	?	?	?
13 - 17 YEARS	15 %	10 %	<b>14 %</b>	11 %	13 %
12 YEARS OR YOUNGER	25 %	15 %	<b>22 %</b>	20 %	21 %
UNDER 3 YEARS	8 %	4 %	<b>3 %</b>	5 %	5 %
NOTE: TOTAL COLUMN IS BASED ON FULL SAMPLE OF CANADIAN ADULTS. MARKET SEGMENT GROUPS ARE BASED ON A REDUCED SAMPLE OF THOSE WHO TRAVELLED AND COMPLETED THE SURVEY.					

**Heritage tourists** closely resemble the Canadian population as a whole with respect to household composition - 2-in-3 of them live in adult-only households and the remaining 1-in-3 have children living at home. A sizeable minority of **Heritage tourists** will likely be sharing their heritage travel experiences with young children - one-fifth have children under twelve years of age (22%).

# Beach Canal Lighthouse Business Plan

## Place of Birth and Ethnic Background

Most Canadians in the three segments were born in Canada and describe themselves as having either a *Canadian* or *British* heritage. The proportion of *new Canadians* in the **Arts tourists** group (22%) is comparable to the proportion of all adult Canadians born outside Canada (21%). These **Arts tourists** are, however, more likely to be new immigrants than are **Heritage** (17%) or **Ecotourists** (14%).

Place of Birth & Ethnic Background - Canadian Adults					
ADULTS, 18+	TOTAL	ARTS TOURISTS	HERITAGE TOURISTS	ECO-TOURISTS	ANY SEGMENT
IN MILLIONS	23.3	1.6	<b>3.0</b>	2.2	4.9
UNWEIGHTED BASE SIZE	(18,385)	(540)	<b>(1,049)</b>	(669)	(1,592)
PLACE OF BIRTH:	?	?	?	?	?
CANADA	79 %	78 %	<b>83 %</b>	86 %	84 %
ALL OTHER COUNTRIES	21 %	22 %	<b>17 %</b>	14 %	16 %
U.K./Europe	10 %	12 %	<b>9 %</b>	7 %	9 %
Asia	5 %	2 %	<b>2 %</b>	1 %	2 %
Central/South America	3 %	2 %	<b>1 %</b>	1 %	1 %
ETHNIC BACKGROUND:	?	?	?	?	?
CANADIAN	47 %	45 %	<b>45 %</b>	53 %	48 %
BRITISH	23 %	28 %	<b>32 %</b>	26 %	29 %
FRENCH	14 %	17 %	<b>12 %</b>	16 %	14 %
OTHER EUROPE	15 %	17 %	<b>18 %</b>	16 %	17 %
SOUTH ASIA	2 %	1 %	*	1 %	1 %
AFRICAN ANCESTRY/BLACK	2 %	1 %	<b>1 %</b>	1 %	1 %
MIDDLE EAST/WEST ASIA/NORTH AFRICA	2 %	*	<b>1 %</b>	*	1 %
EAST ASIA/SOUTHEAST ASIA	3 %	3 %	<b>3 %</b>	2 %	2 %
SOURCE: TAMS CANADA.. NOTE: TOTAL COLUMN IS BASED ON FULL SAMPLE OF CANADIAN ADULTS. MARKET SEGMENT GROUPS ARE BASED ON A REDUCED SAMPLE OF THOSE WHO TRAVELLED AND COMPLETED THE SURVEY.					

The fact that a substantial minority of **Arts tourists** are *new Canadians* helps explain their greater tendency to travel abroad. As noted previously, about half of these **arts** travellers claim to have taken trips to countries other than Canada and the USA in the past couple of years (49%) - a proportion that is significantly higher than those found among **Heritage** (37%) or **Ecotourists** (38%). Place of birth - in or outside Canada - also seems to have a substantive impact on travel activity preferences among members of each market segment.

# Beach Canal Lighthouse Business Plan

## Place of Residence

Essentially, each of the market segments examined mimics the regional distribution of Canada's adult population as a whole. Nonetheless, **Ecotourists** are over-represented in British Columbia (18%) and under-represented in Ontario (32%). **Heritage tourists**, on the other hand, are less likely to live in Quebec (17%) than would be expected based on the proportion of all adult Canadians who live in this that province (25%).

Place of Residence - Canadian Adults					
ADULTS, 18+	TOTAL	ARTS TOURISTS	HERITAGE TOURISTS	ECO-TOURISTS	ANY SEGMENT
IN MILLIONS	23.3	1.6	3.0	2.2	4.9
UNWEIGHTED BASE SIZE	(18,385)	(540)	1,049	(669)	(1,592)
ATLANTIC CANADA	8 %	6 %	7 %	6 %	7 %
QUEBEC	25 %	26 %	17 %	26 %	22 %
ONTARIO	38 %	41 %	43 %	32 %	39 %
PRAIRIES	7 %	7 %	11 %	9 %	10 %
ALBERTA	9 %	5 %	8 %	9 %	8 %
BRITISH COLUMBIA	13 %	15 %	14 %	18 %	15 %
SOURCE: TAMS CANADA. NOTE: TOTAL COLUMN IS BASED ON FULL SAMPLE OF CANADIAN ADULTS. MARKET SEGMENT GROUPS ARE BASED ON A REDUCED SAMPLE OF THOSE WHO TRAVELLED AND COMPLETED THE SURVEY.					

## SUMMARY

### Demographic and Destination Characteristics

**Heritage tourists** - the largest of the three segments - are almost a microcosm of the Canadian population at large from a demographic perspective. These **heritage** travellers are evenly divided between men and women, represent all age groups with some concentration in the 45 to 64 year age cohort. They are somewhat **more affluent** and have **more formal education** than does the Canadian population at large. This group of travellers is especially apt to be Canadian-born. While they take leisure trips to the USA and other countries, they are particularly likely to travel within Canada and show special interest in the western provinces as a destination.

### Some Preliminary Thoughts on Marketing Initiatives

1. The promotion of public transportation in the form of bus and a new multi-site ferry services to the Lighthouse could provide transportation choice and the means to reduce by-automobile-only access to this important heritage property.
2. Use web-based technology to both inform of project progress and to illustrate the intended look of the final refurbished site and how it relates to - and complements - other facilities in the immediate area.
3. Operate a spring-to-autumn Hamilton-Burlington 'double-decker' Heritage Tour Bus from the core to a number of marine theme sites in the immediate area (e.g., the Canadian Marine Discovery Museum, the new Lighthouse 'Centre', etc.) or extend the route of the existing tourist train.

# Beach Canal Lighthouse Business Plan

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4. Build a Preliminary Business plan with timelines that targets the Total Funding required to refurbish the Lighthouse and Keeper's Cottage. Begin by soliciting public (including harbour-based and other area industries) donations before moving to funding requests from Government sectors. Alert all regional MPs and MPPs of the intended 'go ahead' plan.

**NOTE:** There is no question that museums and heritage sites, by presenting history, collections, science and the arts, offer experiences, ideas, personal reflections, and satisfactions not found in other places. That does not mean museums should attempt to present themselves as quiet, isolated havens, distinct from other, more commercial, competitors. Quite the opposite. Many displays, such as blockbuster exhibitions, are also major tourist attraction and revenue makers.

4. Notify other lighthouse associations as well as canal groups, of the project intent to help foster interest and support. There are many such groups in North America and other continents.

5. Conduct a site renovation 'donations push' draw for a mini-tour of lighthouses in the region (26 lighthouses exist on the Canadian side of Lake Ontario/ Lake Erie). Offer many secondary prizes such as Ray Jones' book *Great Lakes Lighthouses - Ontario to Superior* or similar lighthouse theme publications.

6. To increase awareness of the project, remain visibly active in lighthouse preservation groups and enthusiasts nation-wide.

There is a list of Canadian lighthouses in serious danger this includes Lighthouse or light station structures in danger of demolition, collapse, serious neglect, decay as well as in danger of disposal to offshore and non-heritage uses. These endangered lighthouses offer textbook examples of the inadequacy of Canadian government lighthouse preservation. During the initial writing of this report, only 3% of Canadian lighthouses had genuine heritage protection and only 12% even partial protection. That compared poorly to the United States where over 70% of lighthouses over 50 years of age are protected by the National Register of Historic Places. Current federal policy is to sell historic lighthouses off to the highest bidder. The decaying wrecks of lighthouses on the list show the natural result of that "disposal" process which treated lighthouses like parking lots or army surplus boots. Equally disturbing were the historic lighthouses still owned by the Canadian government but severely neglected by funding cuts at the Canadian Coast Guard. Many community groups are striving to save these historic structures (such as the BCLG) but are held back by federal policies enforced by Canada's Treasury Board. Lighthouse Digest has compiled a list of endangered lighthouses. However, during completion of this report a national lighthouse protection act was established. Issues of decaying sites, however, remain. We would highly recommend that the BCLG call or write local MPs, Senators and Mayors to tell them that the National Lighthouse Protection Act should be rigorously used to help keep the "Lights On."

7. Develop a new, separate Interpretive Centre (between the Lighthouse and Keeper's Cottage or some other suitable location within visual connection to the two buildings - See Option 4). Bring the history/story/images to the walls, offer reproduction sections, suitable for framing, of the diary written by the long-time keeper George Thomson for sale, stock the centre with artefacts and rotating exhibits - all focused on the history of the Lighthouse (from the original wooden structure to the existing structure).

8. Write a weekly/monthly column in the Hamilton Spectator about the project, the volunteers' progress, and the funding targets. Get the local schools and the heritage associations signed up for the duration. Develop a 'Beach Canal Lighthouse' website contest, using secondary high school talent.

## Museum Brand Development and Marketing

In the cultural-heritage business, professional branding is essential to success. A brand is a set of expectations instilled in its customers, as well as its employees/volunteers, and others in nearby facilities. It should be an identity concept that is easily distinguishable from others. Equally important, a site brand should enhance communication with all customers – the public included.

# Beach Canal Lighthouse Business Plan

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For the Beach Canal Lighthouse Group concept, branding success must include the recognition that everything the group does and says must drive confidence and increase value for ‘the customer’ (citizens, funding sources, distant heritage visitors, etc.). This is rarely an easy task and there are many rational reasons to dedicate both time and funds to branding the site, including:

- Market differentiation (distinctive understanding & advantage)
- Increased cross-promotional opportunities (better overall margins)
- Better awareness and recognition (leadership in a competitive market)
- Private/public investor confidence (fostering new alliances & funding).

Without question, successful branding initiatives can have immense payback and add genuine value to the buy-in process, whether a site is new or well-established. However, the branding success will depend on an implementation strategy that comprises four essential principals. These important elements are:

- It must be a genuine reflection of core strengths-values-management commitments, and also align with heritage customer values.
- The brand must identify a unique position that clearly differentiates market position, going forward.
- It must carry through every aspect of the BCLG organization, requiring articulation of the site’s identity into a series of actions, beliefs and tools.
- Finally, and perhaps most important, it must be consistent over time.

In every brand development process, four distinct elements are employed, each weighted equally:

**Value Proposition;** it defines the uniqueness you provide to customers.

**Brand Character Definition and Expression** follows; the character of your brand must make sense to your most important target market. Next,

**Positioning Statements** must express your place in the market to help investors, future visitors and others understand your intent; these concepts often form a mission statement or a by-line tagged to your logo (e.g., ‘We’re Keeping the Beach Light On’). And lastly,

**Key Messages** must communicate your chosen information; these 4-5 statements must promote the brand intent and be consistently employed by the entire team.

Further along in the process, brand launch must include a continuous monitoring process to measure value over time to ensure maximum impact is being derived. This stage may include press releases, promotional programs, presentation and memorable methods of reaching the marketplace.

## Summary

No question, a professionally developed brand will give the site identity, character, presence in the market and respect. A brand can grow successfully by leaving a lasting mental picture – meaning a positive mark upon everyone inside the new facility and outside in the customer base. As a ROI value factor, professionally developed branding programs would contribute dramatically to the project’s success.

## Marketing Processes Framework

The definition of marketing and the associated success-oriented Marketing Framework are addressed in the following Exhibit diagram. This process outlines a marketing framework that could be used in addressing

# Beach Canal Lighthouse Business Plan

the scope of marketing activities over both the current pre-build/opening phase, as well as additional recommendations for continuous action after the facility is open to the public (e.g., 2010-2012). The scope of activity comprises three (3) functional areas:

- Research and Planning,
- Visitor Experience Development & Delivery,
- Communications and Sales Promotion.

In common usage, the term ‘heritage marketing’ is often too narrowly defined; we strongly encourage the development of a more balanced and integrated approach that includes all 3 of these functional areas, not simply Communications and Promotion (the most common acronyms for marketing processes). This comprehensive, image-building process should begin immediately as a formal project and continue for a 3-5 year period (even if the new facility opens during that timeframe.)

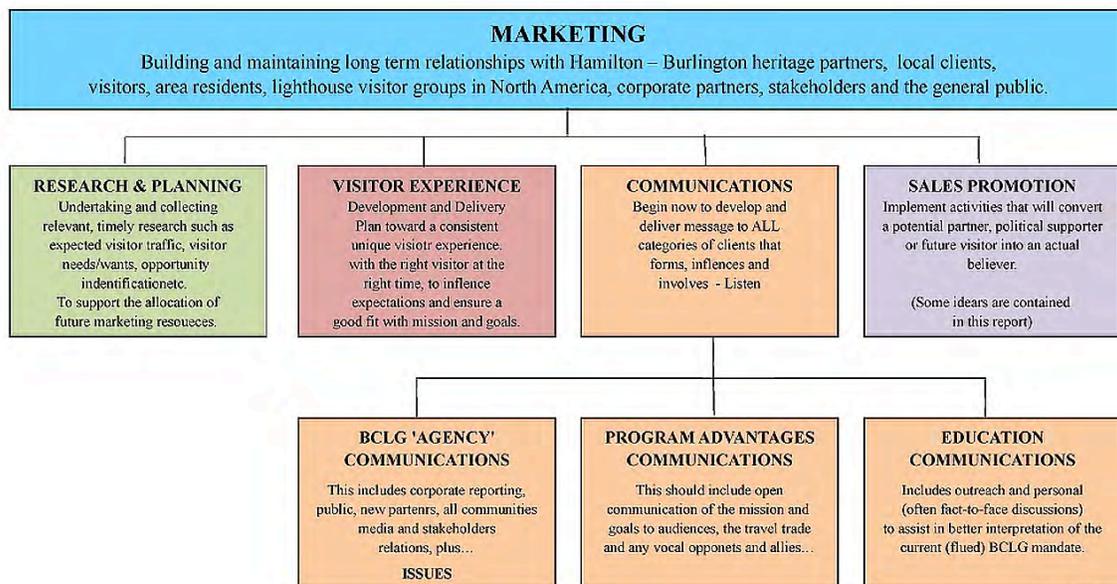
## Marketing the Selected Operating Options (Option 1 and Option 2)

Given the limited estimated operating budgets outlined, the Beach Canal Lighthouse site’s future Business Plan will require a carefully managed process that employs a stepped method of satisfying customer understanding and anticipated requirements.

Before outlining potential 5-year expenditure plans for the various marketing initiatives of Options 1 and 2, it should be reiterated that **MARKETING** means:

- looking outward, not inwards
- constant awareness of what is happening in your market place
- asking, not telling customers what they want
- caring about processes/services as well as ‘products’
- communicating all this through the organization.

“We don’t have marketing, we have information”, said one famous UK museum, in response to a question from a journalist writing about the marketing of museums.



CCRC Inc-2008

## Marketing Strategy and Ideas

Year ONE Operating Budget \$13,400

### 5-year Marketing Plan Focused on Growth and Understanding.

#### MARKETING PLAN PROCESS - Year 1 for both Options 1 and 2

To help ensure continued acceptance and growth, the road to future success may well be based on 'open-architecture' planning. Therefore, we recommend that a 'business map' that charts the Beach Canal Lighthouse Group's course over the next 5 years be developed. This dynamic plan could, of course, be updated as customer trends and heritage markets evolve. [The document could well lead to previously unexplored 'idea development' steps.]

If pursued, this "business map" could include the development of a comprehensive Marketing Plan outlining various directions that should be investigated to take better advantage of new trends, as well as more traditional heritage funding channels. This planning document could contain many interrelated categories for many forms of outreach services (e.g., multimedia support, alliances/partnerships, e-information development, international connections, customer support promise, visitation growth plans, public alliances, heritage associations, etc) including, but not restricted to, the following general topics:

#### **Situational Analysis**

Definition .... determine the audience demand for in-house skills and services and where optimal needs and growth is expected, as well as any areas of decline. (This section could also identify unexplored opportunities, requiring detailed, independent study.)

#### **Competition**

Definition..... obtain information on the attraction strategies of local-regional-national 'competitors', as pricing, service additions, marketing methods, annual memberships, school groups/curriculum, etc.

#### **Economic factors**

Definition..... compile information within selected audience 'zones' where the site could compete, such as target industries for funding, growth regions, etc. Goal: Find out groups that have the most interest in the Lighthouse site.

#### **Technology Impact**

Definition... advancing technologies can result in new opportunities as well as declines in more traditional methods. Explore the use of technology to enhance information services, e.g., virtual museums, etc.

#### **Internal Environment**

Definition.... explore the potential of offering new forms of information options to customers to help them better understand the importance of the site and its place in the history of the region and the Province.

#### **Target Markets**

Definition.... describe customers in detail including and why they buy and visit. This process will assist everyone in using resources to address 'how we can do better', new ideas/markets, etc. Identify opportunities that reverse negatives (e.g., declines in tourist visitation in Ontario and elsewhere).

# Beach Canal Lighthouse Business Plan

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## **Opportunities & Problems**

Definition.... identify the 10 best opportunities what action to take in overcoming any anticipated problems. (This must be true BCLG team process.)

## **Goals & Objectives**

Definition.... detail how the entire team can meet future targets, and define specific objectives... such as quarterly profits, growth, alliances, ROI targets, etc.

## **Marketing Strategy**

Definition.... develop an action plan centred on ways to reach annual growth objectives. This could include how to differentiate the site from similar regional competitors, promote its history in the market(s), carve out audience niches, promotional campaign(s), rewarding experienced volunteers, targeting events, etc.

## **Schedule Tasks**

Definition.... list actions required to implement every item described in the plan's 'market strategy' and when these actions must take place. Share results. (Update only when actions are implemented, not simply to add more tasks.) Revise quickly as 'unknowns' occur.

**Do everything possible to preserve the site's heritage.**

**NOTE:** CCRC makes a minimum funding assumption (ref. ANNEX 1) that year-over-year Marketing, Communications and Outreach growth is \$5,000 for Option 1 – starting from a base budget in year one of \$8,900 and Option 2 at \$10,000 from a base of \$27,500. A similarly conservative assumption of \$13,400 for both options in Year 1 for the development of an initial Marketing Plan – outlined in the previous pages of this document.

### **Option 1: Year 2 [Marketing Budget \$18,400]**

CORPORATE IDENTITY/LOGO:	\$1,500
SIGNAGE:	\$3,000
PUBLIC RELATIONS KITS:	\$1,200
PRINT MEDIA ADVERTISING:	\$3,500
EDITORIAL COVERAGE:	Free
BROADCAST ADVERTISING:	\$2,500
BANNER ADVERTISING:	\$1,500
WEBSITE:	\$5,200

### **Option 1: Year 3 [Budget \$23,400]**

LIGHTHOUSE VIDEO:	\$6,500
OPEN HOUSE EVENT:	\$3,000
MARKETING AUDIT:	\$2,400
PRINT MEDIA ADVERTISING:	\$3,500
EDITORIAL COVERAGE:	Free
BROADCAST ADVERTISING:	\$3,500
TRANSPORT ADVERTISING:	\$2,500
SCHOOL OUTREACH:	\$2,500
WEBSITE UPDATE:	\$1,000
STREET BANNERS:	\$2,000

### **Option 1: Year 4 [Budget \$28,400]**

CONFERENCE SPONSOR:	\$3,000
CO-OP TV ADVERTISING:	\$5,500

# Beach Canal Lighthouse Business Plan

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LIGHTHOUSE THEME ITEMS:	\$4,000
PUBLIC INFO KITS:	\$2,200
PRINT MATERIALS UPDATE:	\$5,500
BROADCAST ADVERTISING:	\$2,500
NEW GIVEAWAY PROMOS:	\$4,000
2 <sup>nd</sup> MARKETING AUDIT:	\$1,500
IMAGE MATERIALS:	\$3,700

## **Option 1: Year 5 [Budget \$33,400]**

Year 5 expenditures will be based on updating collateral materials and operational surplus in any number of categories. Marketing expense predictions 4 years after doors open require budget actuals and specific operational needs. Ref. ANNEX 1.

## **Option 2: Year 2 [Budget \$37,800]**

CORPORATE IDENTITY/LOGO:	\$3,000
SIGNAGE & POSTER:	\$6,000
PUBLIC RELATIONS PUSH:	\$6,500
PRINT MEDIA MATERIALS:	\$7,000
EDITORIAL COVERAGE:	Free
BROADCAST ADVERTISING:	\$5,500
BANNER ADVERTISING:	\$2,500
WEBSITE:	\$7,100

## **Option 2: Year 3 [Budget \$47,800]**

LIGHTHOUSE VIDEO:	\$7,500
INTERPRETIVE CENTRE CONF.:	\$6,000
GUEST SPEAKERS (2):	\$4,000
PRINT MEDIA ADVERTISING:	\$5,500
EDITORIAL COVERAGE:	Free
BROADCAST ADVERTISING:	\$4,500
TRANSPORT ADVERTISING:	\$4,000
SCHOOL OUTREACH:	\$3,500
WEBSITE UPDATE:	\$2,800
STREET BANNERS:	\$3,000
MARKETING AUDIT:	\$2,400
CASH TO RESERVE FUND:	\$10,000

## **Option 2: Year 4 [Budget \$57,800]**

REGIONAL CONFERENCE:	\$5,000
CO-OP TV ADVERTISING:	\$9,000
LIGHTHOUSE THEME ITEMS:	\$5,000
ADS FOR ON-LOAN DISPLAYS:	\$3,000
PRINT MATERIALS UPDATES:	\$6,500
BROADCAST ADVERTISING:	\$2,500
INTERNET PROMOS:	\$2,000
2 <sup>nd</sup> MARKETING AUDIT:	\$2,500
SITE IMAGE MATERIALS:	\$3,700
VOLUNTEER APPRECIATION:	\$5,500
CASH TO RESERVE FUND:	\$15,000

## **Option 2: Year 5 [Budget \$63,800]**

## Beach Canal Lighthouse Business Plan

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As stated in Option 3, Year 5 expenditures will be based on updating collateral materials and operational surplus in any number of categories. Marketing expense predictions 4 years after doors open will require budget actuals and specific operational.

## **Section 5**

### **5-Year Forecast for the Preferred Options**

#### **Introduction**

In summary, Option 1 calls for the restoration of the Lighthouse and Keeper's Cottage with all visitor support facilities provided from within the existing buildings. Option 2 is based on the assumption that an interpretive center of approximately 10,000 square feet is constructed on or near the site of the Beach Canal Lighthouse site.

The best way to approach the detailed business plan for these two options is to view them through the proposed five-year financial projections. While some of these have been expanded in the marketing section of this report, the following sections detail the day-to-day operational requirements for each option and offer a five-year projection for each of the two options with recommendations following from these projections.

In the detailed development of each of these two options, a refinement of operational costs has occurred. Minor variations with the original option forecasts have occurred as each of the two options were "fine tuned".

#### **OPTION 1**

##### **A year round operation within the existing buildings with a number of paid staff.**

In this option, we recommend that all curatorial support services be located outside of the existing heritage buildings complex.

#### **Opinion of Cost**

We have included the previously completed Opinion of Cost prepared at the end of 2007 to define this value. The original document, together with explanations of the individual items, is included in Appendix B of this report. The values presented at that time have been incremented slightly to account for inflation, which, in the construction industry over the summer of 2008, was quite high. This inflation may attenuate as the imminent recession begins to bite.

In addition to the base restoration costs, we have added costs to include fitting out of the interpretive component of the Keeper's Cottage and an allowance for furnishings. The cost breakdown is presented on the following pages.

## Beach Canal Lighthouse Business Plan

### Opinion of Cost – Lighthouse – Option One

Item	Budget
1. Preliminary documents – Since much of the information could be developed under a voluntary basis, a small amount is carried here for expenses only.	1,025
2. Investigation and testing may include mortar tests, tests for hazardous materials, and coring to determine the depth of ground water and condition of the pilings supporting the foundation.	7,750
3. Support facilities – to be installed in the Keeper’s Cottage. Some preliminary upgrading would be required and a budget allowance is included. If done in sequence, some of the upgrade work to the lighthouse could be included as a part of the upgrade and restoration work to the cottage.	10,250
4. Scaffolding – for restoration work of this type, a full scaffolding system is recommended as this work is done in a sequence including initial marking of areas to be repaired, cutting out, backpointing and pointing. Once pointed, the masonry must be allowed to cure (or carbonate) for a period of a month and the scaffolding used during this period to support tarps to keep the mortar damp by providing shade.	180,000
5. 100% repointing, 50% deep backpointing and application of limewash.	215,000
6. Lantern repairs which will include new caulking, glazing, and painting both inside and outside. The budget provided is for contracted work which may, to a great extent, be completed by instructed volunteers.	40,000
7. Window repairs and stairway repairs – as much as possible, the remaining existing stairs should be used with rotted or damaged areas replaced with similar material. Vestibule installation.	21,500
8. Interior interpretive panels, furnishings, lighting etc.	24,475
<b>Base cost</b>	<b>500,000</b>
Contingency – a contingency of approximately 15% is usually recommended to deal with issues that may not be reasonably anticipated at the design stage. This may be adjusted as the work progresses.	75,000
Construction budget – this amount may be lowered by volunteer labour or donations of materials but a total figure should be used as an indicator of the total value of the project as it may be useful in obtaining grants and donations from various sources	575,000
Engineering and consulting – we have carried a rate for this work of 10% which is lower than recommended fees. However, the involvement of skilled professionals with the project is an asset. Some of these costs may be lowered with donations of time. A full estimate of cost, as noted above, is useful in terms of donations and grants.	57,500
<b>Total budget for Lighthouse</b>	<b>632,500</b>

## Beach Canal Lighthouse Business Plan

### Opinion of Cost – Keeper’s Cottage – Option One

Item	Budget
1. Preliminary documents - Since much of the information may be developed under a voluntary basis, a small amount is carried here for expenses only. Restoration plans would be prepared under the consulting budget (below).	1,025
2. Dismantling – sequential dismantling will reveal the original layout and finishes. This must be carefully done and all information keyed to the drawings. Testing (below) for hazardous materials should be done first.	20,500
3. Investigation and testing may include mortar tests, and tests for hazardous materials such as lead paint.	2,550
4. Support facilities –to be installed in the Keeper’s Cottage. Since the amount is already carried under the Lighthouse budget only minor renovations would be required to complete the area.	2,050
5. Scaffolding – only a limited amount of scaffolding should be required for this project as it can be relocated as the work progresses.	25,750
6. Shingles and flashing – the roof appears to be in fair to good condition. Installation of shingles to the rear shed and repairs to the main roof are recommended at present.	15,500
7. Pointing and masonry repairs – the exterior walls are in good condition save for some noted cracking and areas, particularly at the foundation, which may require repairs.	20,500
8. Window repairs would include the fabrication of new exterior storm windows and rehabilitation of the original windows. Testing and assessment of original paint layers should be done with all painted elements prior to refinishing to establish and record the original colour schemes.	10,250
7. Rear wing repairs would include a full restoration of the wing to its original appearance	20,500
8. Landscaping – a modest budget is provided for minor improvements to paths and planting areas. No allowance is made for a site fence, as its size is not known.	1,750
9. Insulation – a modest amount of insulation and upgrading can be installed depending on decisions related to how the site is to be operated. More extensive insulation would reduce the authenticity of the restoration but may provide more usability and vice versa.	3,750
10. Interior plaster repairs and painting – once an assessment of original colours is completed, repairs and painting can be performed to the interior finishes. The degree of restoration should govern the policy – either repair the plaster using original materials, or cover the plaster with ¼” drywall and paint. Options should be carefully assessed at the planning stage.	20,500
11. Interior woodwork repairs and painting.	3,000

## Beach Canal Lighthouse Business Plan

12. Interior doors and hardware	2,500
13. Interior trim restoration	5,250
14. New electrical system	10,250
15. New heating system – minimum damage to the fabric of the building is advisable so this selection must be made with a view to providing climate control with delivery of heating and/or cooling in as discrete manner as possible.	10,250
16. Interior interpretive panels, furnishings, lighting etc.	15,000
<b>Base cost</b>	<b>190,875</b>
Contingency – for work of this type a contingency of approximately 15% is usually recommended to deal with issues that may not be reasonably anticipated at the design stage. This may be adjusted as the work progresses.	28,625
Construction budget – this amount may be lowered by volunteer labour or donations of materials but a total figure should be used as an indicator of the total value of the project as it may be useful in obtaining grants and donations from various sources	219,500
Engineering and consulting – we have carried a rate for this work of 10% which is lower than recommended fees. However, the involvement of skilled professionals with the project is an asset for the project, Some of these costs may be lowered with donations of time. A full estimate of cost, as noted above, is useful in terms of donations and grants.	22,000
<b>Total budget</b>	<b>241,500</b>

Total budget for Lighthouse restoration	632,500
Total budget for Keeper's Cottage	241,500
<b>Base cost for restoration and conversion to suit Option 1</b>	<b>874,000</b>

The opinions of cost provided are based on visible information and current conditions at the time of this report. The amounts are presented in current dollars to the date of the report but are not escalated into the future. The opinions of cost will be subject to prevailing market conditions, escalations or reductions in material and labour costs over which we, and our sources, have no control. The amounts could have a range of +/- 20% depending on market conditions at the time of the work. Contingencies must be included in the pricing to cover unseen or unknown issues that may only be visible after initiation of the work.

While the costs presented are opinions related to the potential cost of contracted work, it is probable that some reductions can be made in the totals by virtue of the donation of materials or labour. In such instances the value of the labour and donated materials should be accounted for and offset against the budget figures. It is important that this be done so that fundraising and applications for grants fully represent the value of the work.

# Beach Canal Lighthouse Business Plan

## Staffing and Expenses

Under this full-time operational scenario the site would be operated at a level of professional maturity enjoyed by the other heritage sites managed by the City of Hamilton. The Lighthouse and the Keeper's Cottage would be open to the public on a year round basis and employing a full-time Manager and three half time (0.5 FTE x 3) staff comprised of an education and program officer, an administrative support person and a maintenance technician, for a total of 2.5 FTEs. In addition to this complement it is recommended that two seasonal staff be engaged to allow for wider interpretation of the site during the summer months and to permit some core staff absenteeism for holidays during the summer.

As is the case with almost all small community museums operating in the province of Ontario, a continued reliance on volunteers is essential for the success of the various programs that may be offered by the BCLG in cooperation with the City of Hamilton. These volunteers can be drawn from the existing group of dedicated volunteers.

The site would be open well over the minimum requirement for a full-time museum as defined by the Ontario Ministry of Culture and is projected to employ one full-time dedicated staff member (Manager/Curator) to oversee the operation. This would qualify the site for membership in the provincial Community Museum Operating Grant program (CMOG) - the only mandated museum grants programme in the province.

The City of Hamilton's annual contribution to this site would be in the area of \$106,000 and increase modestly on an annual basis.

Both the Lighthouse and Keeper's Cottage would be open to the public at all times when the site is open. Option 1 would need strong curatorial support facilities which would need to be provided off-site by the City of Hamilton as the Keeper's Cottage is not capable of supporting all administrative functions needed to operate a full time historic site. It is recommend that Option 1 be managed by the Manager/Curator and that this position be located off-site with the administrative assistant and that such functions as booking of tours and programme development also be off site. A location within the City Centre complex for these functions would need to be found. It is further noted that the budget projections developed as part of this Option does not include an allocation for rent payments to the City for these services. It is assumed that the space, furnishings, etc. can be found within the existing financial framework of the City.

<b>Cost of Operations per Visitor</b>	<b>Five Year Projection (Scenario 3)</b>				
	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
Total Operating Costs	256,010	270,575	284,535	296,865	310,460
Annual Attendance	21,400	24,500	26,900	29,100	31,400
<b>TOTAL Cost / Visitor</b>	<b>11.96</b>	<b>11.04</b>	<b>10.58</b>	<b>10.20</b>	<b>9.89</b>

All site interpretation, gift shop functions and other facilities such as public washrooms would have to be included within the framework of the Keeper's Cottage. The costs of installing these services are included in the capital forecast presented elsewhere in this report. It should also be noted that the financial forecasts presented here make the assumption that all capital work has been completed and therefore only minor costs for infrastructure maintenance has been included in the budget.

It is noted that this scenario, although meeting the immediate needs of having the site preserved, opened to the public and operated on a professional footing, would have limits to growth, which is reflected both in the visitor projections and within the financial growth projections of this option.

# Beach Canal Lighthouse Business Plan

<b>REVENUE SUMMARY</b>	<b>Five Year Projection (Option One)</b>				
	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
1 Brought Forward	0	0	0	0	0
2 Core Activities	90,710	103,575	114,135	123,265	133,310
3 Donations	6,000	7,000	8,300	9,500	10,000
4 Endowments and Trusts	0	0	0	0	0
5 Gift Shop	39,700	39,700	41,900	41,900	43,350
6 Municipality	106,000	107,000	108,000	110,000	112,000
7 Rent	0	0	0	0	0
8 Grant - Province of Ontario (CMOG)	15,000	15,000	15,000	15,000	15,000
9 Grant - Federal	6,500	6,500	6,500	6,500	6,500
<b>TOTAL MUSEUM INCOME</b>	<b><u>263,910</u></b>	<b><u>278,775</u></b>	<b><u>293,835</u></b>	<b><u>306,165</u></b>	<b><u>320,160</u></b>

<b>EXPENSE SUMMARY</b>	<b>Five Year Projection (Option One)</b>				
	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
10 Salaries and Benefits	195,280	199,360	205,592	209,944	214,080
11 Conservation	2,200	2,300	2,000	2,000	2,500
12 Curatorial	4,800	5,000	5,200	6,300	6,400
13 Outreach	4,500	4,500	4,500	4,500	4,500
14 Marketing and Communication	8,900	18,400	23,400	28,400	33,400
15 Acquisitions	900	900	900	900	900
16 Displays	4,500	5,000	5,500	5,500	6,000
17 Building Maintenance	9,500	11,000	11,800	12,700	13,400
18 Gift Shop	26,500	25,200	27,000	28,000	30,500
19 Administration	6,700	7,000	7,600	7,800	8,200
<b>TOTAL MUSEUM EXPENSES</b>	<b><u>263,780</u></b>	<b><u>278,660</u></b>	<b><u>293,492</u></b>	<b><u>306,044</u></b>	<b><u>319,880</u></b>
Salary costs as a percentage of total op. costs		72	70	69	67
<b>TOTAL - Surplus / (-Deficit)</b>	<b><u>130</u></b>	<b><u>115</u></b>	<b><u>343</u></b>	<b><u>121</u></b>	<b><u>280</u></b>

On the following pages are the budget spreadsheets for Revenue and Expenditures for Option 1. Following each sheet, we include budget notes for the detailed sheets for OPTION 1. “R” Notes (R-02) are notes related to Revenue and “E” Notes reference Expenditures.

# Beach Canal Lighthouse Business Plan

<b>DETAILED REVENUE</b>	<b>Note</b>	<b>Five Year Projection (Option One)</b>				
		<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
<b>1 Brought Forward</b>						
Brought Forward	<b>R-01</b>	0	0	0	0	0
1 TOTAL Brought Forward						
<b>2 Core Activities</b>						
Admission Revenue	<b>R-02</b>	88,810	101,675	111,635	120,765	130,310
Special Program Revenue	<b>R-03</b>	1,900	1,900	2,500	2,500	3,000
2 TOTAL Core Activities		90,710	103,575	114,135	123,265	133,310
<b>3 Donations</b>						
Individual (Donation Box)	<b>R-04</b>	2,500	2,500	2,800	3,000	3,500
Individual (General)	<b>R-05</b>	1,500	1,500	2,000	2,500	2,500
Corporate	<b>R-06</b>	2,000	3,000	3,500	4,000	4,000
3 TOTAL - Donations		6,000	7,000	8,300	9,500	10,000
<b>4 Endowments and Trusts</b>						
Endowments	<b>R-07</b>	0	0	0	0	0
Trusts	<b>R-08</b>	0	0	0	0	0
4 TOTAL Endowments and Trusts		0	0	0	0	0
<b>5 Gift Shop</b>						
Giftware (Markup - 50%)	<b>R-09</b>	7,500	7,500	9,000	9,000	9,750
Books (Markup @ 40)	<b>R-10</b>	11,200	11,200	11,900	11,900	12,600
Consignment Sales (Markup @ 75%)	<b>R-11</b>	21,000	21,000	21,000	21,000	21,000
5 TOTAL - Gift Shop		39,700	39,700	41,900	41,900	43,350
<b>6 Municipality</b>						
Operating Contribution - City of Hamilton	<b>R-12</b>	106,000	107,000	108,000	110,000	112,000
Municipal Grant (other)	<b>R-13</b>	0	0	0	0	0
6 TOTAL Municipality		106,000	107,000	108,000	110,000	112,000
<b>7 Rent</b>						
Special Events	<b>R-14</b>	0	0	0	0	0
Community Groups		0	0	0	0	0
7 TOTAL - Rent		0	0	0	0	0
<b>8 Grant - Province of Ontario (CMOG)</b>						
CMOG	<b>R-15</b>	15,000	15,000	15,000	15,000	15,000
Misc. Provincial Grants	<b>R-16</b>	0	0	0	0	0
8 TOTAL - Grant, Province of Ont.		15,000	15,000	15,000	15,000	15,000
<b>9 Grant - Federal</b>						
Student Wage Subsidy (Cdn Wks)	<b>R-17</b>	6,500	6,500	6,500	6,500	6,500
9 TOTAL - Grants - Federal		6,500	6,500	6,500	6,500	6,500
<b>TOTAL REVENUE</b>		<b>263,910</b>	<b>278,775</b>	<b>293,835</b>	<b>306,165</b>	<b>320,160</b>

## REVENUE

### Note R-01 Brought Forward

This budget line is left with a "0" balance. It is assumed that budget planning would be based on a "not-for-profit" model and that each year the budget base would start from a neutral position. However, in the event that surpluses (or deficits) are to be carried forward as a means of financial policy, this category would provide for that function.

### Note R-02 Core Activities – Admissions Revenue

One of the principal revenue streams from this operation would be admissions revenue. We have analyzed the admissions rates at the five sites operated by the City of Hamilton and estimated (based on similar sites of similar scope of programmes and size), and developed a

# Beach Canal Lighthouse Business Plan

forecast of visitor flow that is based on a moderately aggressive advertising and marketing plan (see section 4). Funds have been provided for this plan within the operating budget.

CITY OF HAMILTON OWNED HERITAGE SITES	ANNUAL ATTENDANCE				
	2003	2004	2005	2006	2007
Whitehern Historic House	6,596	6,010	4,605	5,998	6,546
Dundurn National His. Site	68,076	65,507	64,073	48,818	53,703
Children's Museum	24,752	21,287	19,883	18,105	17,556
Museum of Steam and Tech	14,041	13,262	13,050	11,312	12,388
Battlefield House Museum	9,865	15,353	11,079	17,077	22,210
<b>ANNUAL TOTAL</b>	<b>123,330</b>	<b>121,419</b>	<b>112,690</b>	<b>101,310</b>	<b>112,403</b>

A site of this size, without an associated interpretive centre, may be limited by the number of visitors the fabric of the building can accommodate without sustaining unacceptable levels of wear and tear. In a building with interior wood and frame finishes, it is usually assumed that an annual attendance of approximately 25,000 is the point at which damage due to visitation may require protective procedures and alternative facilities to direct most of the visitation to events in newer non-heritage programming areas. Regardless, with even a much smaller visitation, protective measures such as runners and barriers should be a part of the plan. The large numbers in the summer seasons can only be attracted and serviced with on-site programming such as fairs and festivals – with a guided tour arrangement and capped visitor numbers for those actually entering the house.

Attendance Projections (Year One)	Mo	Five Year Projection (Option One)				
		1	2	3	4	5
	JAN	200	200	300	300	500
	FEB	200	200	500	800	1,000
	MAR	300	400	800	1,000	1,300
	APR	500	800	1,000	1,300	1,500
	MAY	1,000	1,200	1,500	1,800	2,000
	JUN	2,000	2,500	3,000	3,200	3,500
	JUL	6,000	6,500	6,500	6,800	7,000
	AUG	6,000	6,500	6,500	6,800	7,000
	SEP	2,000	2,500	2,500	2,800	2,800
	OCT	1,000	1,500	1,800	1,800	2,000
	NOV	700	700	1,000	1,000	1,200
	DEC	1,500	1,500	1,500	1,500	1,600
	<b>TOT</b>	<b>21,400</b>	<b>24,500</b>	<b>26,900</b>	<b>29,100</b>	<b>31,400</b>

### Note R-03 Core Activities – Special Programmes

These are programs that relate specifically to the site. These can include lectures by staff and invited guests (off site - the buildings do not provide for sufficient space to accommodate this function), special educational programs and community activities that the site may take part on an annual basis.

Revenue based on Admissions Charges	@	Five Year Projection (Option One)				
		1	2	3	4	5
Adult - General Admissions	5.00	32,100	36,750	40,350	43,650	47,100
Student - General Admissions	4.00	4,280	4,900	5,380	5,820	6,280
Child - General Admissions	3.00	9,630	11,025	12,105	13,095	14,130
School Program Admissions	4.00	25,680	29,400	32,280	34,920	37,680
Group Tours Admissions	4.00	8,560	9,800	10,760	11,640	12,560
Special Events Admissions	4.00	8,560	9,800	10,760	11,640	12,560
		<b>88,810</b>	<b>101,675</b>	<b>111,635</b>	<b>120,765</b>	<b>130,310</b>

**Note R-04 Donations – Individual (Donation Box)**

It is recommended that the site establish a donation box in the vicinity of the front desk and admissions area. Most sites of this size and scope with the projected attendance figures included in this business plan can expect to gain between \$2,500 and \$3,500 annually from a simple request for help.

**Note R-05 Donations - General (General)**

Donations that are outside the noted area above, such as gifts that arrive in the mail or in other ways, but NOT through the donation box at the front desk.

**Note R-06 Donations – Corporate**

Financial gifts from organizations that wish to support the aims and objectives of the site. These can be the results of staff/Board approaches to specific organizations as well as unsolicited gifts.

**Note R-07 Endowments and Trusts - Endowments**

**Note R-08** The raising of funds from Endowments and Trusts require a substantial amount of work and a commitment of substantial time.

**Note R-09 Gift Shop – Giftware**

A gift shop can provide a small revenue centre to assist in the operation of the site. However, most frequently such an operation must be viewed as a visitor service rather than a major retail outlet. Because of the relatively small space available within the walls of the Keeper's Cottage, it is viewed as a relatively small operation with a limited line of goods. All items for sale should have a theme approach that reflects the role and function of the Lighthouse and must not be viewed as competition to commercial markets. While we have provided for income from this source, a judgement must be made to ensure that the space used and time required is acceptable and this may only be the case with a staff person at the point of sale at all times.

**Note R-10 Gift Shop – Books**

As with Giftware, it is anticipated that book sales would be specific to the site and focus on the general theme of lighthouses, City of Hamilton history and Great Lakes navigation.

**Note R-11 Gift Shop – Consignment Sales**

Consignment sales can be a relatively inexpensive way to stock a gift shop. However, it should be noted that it also represents a substantial commitment of staff time. Good quality control of the material offered for sale must be maintained and staff must be prepared to offend some members of the community from time to time. This area is one that lends itself well to a volunteer coordinator.

**Note R-12 Municipality – Operating Contribution – City of Hamilton**

The operating budget of the BCL would require a contribution of \$106,000 in year one from the City of Hamilton. In the proposal, the consultants have used salary figures supplied by City staff and applied an approximate benefit package that reflects what staff costs currently are for the City. It is noted here that the staff costs are considerably higher than the contribution from the City. It is also noted that the projected city contribution grows by approximately 4% over the five years covered by this forecast. There is modest incremental growth built into salary increases that are larger than the City's increase in operating contributions (see discussion on NOTE E-01/07).

**Note R-13 Municipality – Municipal Grant (other)**

From time to time the Municipality may wish to provide a special grant for a specific project. However, such grants cannot form part of an operating forecast at this time as any such projects would be funded through the capital budget process and would exist outside the

## Beach Canal Lighthouse Business Plan

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operations budget. However, there might, from time to time with appropriate promotion, be grants made available from neighbouring municipalities.

**Note R-14 Rent – Special Events**

This category has been left with “0” revenue. It is not anticipated that there would be sufficient space available for the receipt of rental income from special events or from community groups.

**Note R-15 Grants – Province of Ontario – Community Museum Operating Grant**

As a full time (more than 1,080 hours of posted public access over a minimum of 8 months per year, and with one full time staff member dedicated solely to the management of this site) the Beach Canal Lighthouse could qualify for this statutory grant program. The program is based on annual expenditures of the site (using the previous year financial statements) and given the projected operating budget it is estimated that the annual CMOG contribution would be in the range of \$15,000. It is noted here, however, that there is considerable ministerial discretion on the amount received by individual organizations, but the current pattern reflects that this amount is achievable. There are, however, no promises given for this grant – the City would have to work with the Ministry of Culture Staff to ensure eligibility.

**Note R-16 Grants – Province of Ontario – Misc. Provincial Grants**

From time to time the Province may introduce program specific grants. In the event that such a program grant is made available (upon application) the BCL should seek such funding. However, applications for these grants should not place an undue burden on staff and the programme must be assessed as being of direct benefit to the site.

**Note R-17 Grant – Federal – Student Wage Subsidy (Cdn Wks)**

The Federal Government has a long history of supporting student employment. These programs are frequently offered at a 50% to 60% subsidy. This program has been included in this budget but, should it not be available, the summer student employment indicated in this budget may have to be reduced by 50%.

# Beach Canal Lighthouse Business Plan

## DETAILED EXPENSES

	Note	Five Year Projection (Option One)				
		1	2	3	4	5
<b>10 Salaries and Benefits</b>						
Director/Curator/Manager (1 FTE=\$68,000 @ 100%)	E-01	68,000	69,500	71,500	73,000	74,500
Programming Officer (1 FTE = \$45,000 @ 50%)	E-02	22,500	23,000	23,600	24,200	24,800
Adm.Support/Gift Shop Staff (1 FTE = \$40,000 @ 50%)	E-03	20,000	20,500	21,000	21,500	22,000
Technician/Maintenance (1 FTE = \$45,000 @ 50%)	E-04	22,500	23,000	23,600	24,200	24,200
Core Staff Benefits (calculated at 36% of salaries)	E-05	47,880	48,960	50,292	51,444	52,380
Seasonal Staff (2 pers x 400 hrs @ \$15.00 /hr)	E-06	12,000	12,000	13,000	13,000	13,500
Seasonal Staff Benefits (calculated at 20% of salaries)	E-07	2,400	2,400	2,600	2,600	2,700
<b>10 TOTAL - Salaries and Benefits</b>		<b>195,280</b>	<b>199,360</b>	<b>205,592</b>	<b>209,944</b>	<b>214,080</b>
<b>11 Conservation</b>						
Supplies and Materials	E-08	1,000	1,000	1,000	1,000	1,500
Equipment	E-09	1,000	1,000	500	500	500
Miscellaneous Conservation		200	300	500	500	500
<b>11 TOTAL - Conservation</b>		<b>2,200</b>	<b>2,300</b>	<b>2,000</b>	<b>2,000</b>	<b>2,500</b>
<b>12 Curatorial</b>						
Supplies	E-10	1,500	1,500	1,500	2,000	2,000
Meetings/ Conferences	E-11	1,200	1,200	1,200	1,200	1,200
Specific Professional Supplies	E-12	1,000	1,000	1,000	1,500	1,500
Travel	E-13	800	1,000	1,200	1,300	1,400
Miscellaneous Curatorial		300	300	300	300	300
<b>12 TOTAL - Curatorial</b>		<b>4,800</b>	<b>5,000</b>	<b>5,200</b>	<b>6,300</b>	<b>6,400</b>
<b>13 Outreach</b>						
Events and Activities	E-14	1,500	1,500	1,500	1,500	1,500
Community Outreach	E-15	2,000	2,000	2,000	2,000	2,000
Education Program Supplies	E-16	700	700	700	700	700
Miscellaneous - Outreach		300	300	300	300	300
<b>13 TOTAL - Outreach</b>		<b>4,500</b>	<b>4,500</b>	<b>4,500</b>	<b>4,500</b>	<b>4,500</b>
<b>14 Marketing and Communications</b>						
Brochures, Posters, Flyers	E-17	6,000	7,000	8,000	8,500	9,000
In-house Orientation Printing	E-18	1,000	1,500	1,800	2,000	2,500
Advertising - Print, Radio, TV.	E-19	1,500	1,500	2,000	3,000	3,500
Special Marketing Initiatives (See Section 3 of report)	E-20	0	8,000	11,200	14,500	18,000
Miscellaneous - Advertising		400	400	400	400	400
<b>14 TOTAL - Marketing and Communication</b>		<b>8,900</b>	<b>18,400</b>	<b>23,400</b>	<b>28,400</b>	<b>33,400</b>
<b>15 Acquisitions</b>						
Purchases	E-21	0	0	0	0	0
Customs, Duty, Taxes		0	0	0	0	0
Transportation, Shipping		500	500	500	500	500
Appraisals	E-22	200	200	200	200	200
Miscellaneous - Acquisitions		200	200	200	200	200
<b>15 TOTAL - Acquisitions</b>		<b>900</b>	<b>900</b>	<b>900</b>	<b>900</b>	<b>900</b>
<b>16 Displays</b>						
Permanent - Construction, Fabrication	E-23	1,000	1,500	1,500	1,000	1,000
Temporary - Construction, Fabrication	E-24	500	500	500	1,000	1,000
Off-site Exhibits	E-25	1,000	1,000	1,500	1,500	2,000
Photography, text panels, etc.		1,500	1,500	1,500	1,500	1,500
Miscellaneous - Displays		500	500	500	500	500
<b>16 TOTAL - Displays</b>		<b>4,500</b>	<b>5,000</b>	<b>5,500</b>	<b>5,500</b>	<b>6,000</b>

# Beach Canal Lighthouse Business Plan

## DETAILED EXPENSES (Cont.)

	Note	Five Year Projection (Option One)				
		1	2	3	4	5
<b>17 Building Maintenance</b>						
<b>Lighthouse</b>						
Routine Repairs and Maintenance	E-26	1,000	1,000	1,000	1,000	1,000
Utilities	E-27	500	500	500	500	500
Janitorial Supplies and Maintenance	E-28	200	200	200	200	200
Grounds Maintenance		300	300	300	300	300
Security Systems (Monitoring)	E-29	250	250	250	250	250
HVAC Service Agreements	E-30	250	250	250	250	250
Taxes	E-31	0	0	0	0	0
Insurance (Property, Liability & Equipment)		600	600	600	600	600
Miscellaneous - Lighthouse		100	100	100	100	100
<b>SUB-TOTAL - Lighthouse</b>		<b>3,200</b>	<b>3,200</b>	<b>3,200</b>	<b>3,200</b>	<b>3,200</b>
<b>Keeper's Cottage</b>						
Routine Repairs and Maintenance	E-32	1,500	2,500	3,000	3,500	3,500
Utilities	E-33	1,200	1,500	1,600	1,800	1,200
Janitorial Supplies and Maintenance	E-34	800	800	800	800	2,000
Grounds Maintenance	E-35	800	800	800	800	800
Security Systems (Monitoring)		400	500	500	600	600
HVAC Service Agreements	E-36	500	500	600	700	700
Taxes	E-37	0	0	0	0	0
Insurance (Property, Liability & Equipment)		800	900	1,000	1,000	1,100
Miscellaneous - Keeper's Cottage		300	300	300	300	300
<b>SUB-TOTAL - Keeper's Cottage</b>		<b>6,300</b>	<b>7,800</b>	<b>8,600</b>	<b>9,500</b>	<b>10,200</b>
<b>17 TOTAL - Building Maintenance</b>		<b>9,500</b>	<b>11,000</b>	<b>11,800</b>	<b>12,700</b>	<b>13,400</b>
<b>18 Gift Shop</b>						
Merchandise for re-sale (50%)	E-38	5,000	5,000	6,000	6,000	6,500
Books for re-sale (60%)	E-39	8,000	8,000	8,500	8,500	9,000
Consignment Sales (Pay back-75%)	E-40	12,000	12,000	12,000	12,000	12,000
Gift Shop Supplies	E-41	1,500	200	500	1,500	3,000
<b>18 TOTAL - Gift Shop</b>		<b>26,500</b>	<b>25,200</b>	<b>27,000</b>	<b>28,000</b>	<b>30,500</b>
<b>19 Administration</b>						
Office Supplies	E-42	1,200	1,200	1,400	1,400	1,500
Office Equipment Service Agreements	E-43	500	500	600	600	700
Postage		800	800	800	800	800
Telephone		1,000	1,200	1,400	1,500	1,600
Internet Charges		500	500	500	500	500
Accounts and Audits		1,500	1,500	1,500	1,500	1,500
Bank Charges		400	500	600	700	800
Institutional Memberships	E-44	500	500	500	500	500
Miscellaneous - Maintenance		300	300	300	300	300
<b>19 TOTAL - Administration</b>		<b>6,700</b>	<b>7,000</b>	<b>7,600</b>	<b>7,800</b>	<b>8,200</b>
<b>20 Bring Forward</b>						
Surplus (-Deficit)		130	115	343	121	280
<b>20 TOTAL - Bring Forward</b>		<b>130</b>	<b>115</b>	<b>343</b>	<b>121</b>	<b>280</b>
<b>TOTAL - EXPENSES</b>		<b>263,780</b>	<b>278,660</b>	<b>293,492</b>	<b>306,044</b>	<b>319,880</b>
<b>TOTAL - REVENUE</b>		<b>263,910</b>	<b>278,775</b>	<b>293,835</b>	<b>306,165</b>	<b>320,160</b>

## EXPENSES

### Note E-01 Salaries and Benefits – Director/Curator/Site Supervisor (1 FTE = \$68,000 @ 100%)

Based on information obtained from city staff, the consultants have estimated that the senior person employed at this site (City employee) would most likely be placed in a salary grid at a starting level of \$68,000 per year. We have not offered a title for this position, but it is noted that depending on the employer, one of the three options offered above may be appropriate.

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The job specifications for this position should include experience with the operation of a small heritage site, preferably in the municipal sector. A minimum of 5 years experience would be an asset as it is viewed as a “self starting” position. This should be viewed as a jr. management position with the candidate holding, at a minimum an undergraduate degree, but preferably with some post graduate experience.

This position has an element of supervisory responsibility of a part time staff as well as the need to organize and implement annual budgets of under \$350,000.

Incremental increases have been provided for over the five-year forecast consistent with most grid movements at the municipal level. There are no inflationary increments in this budget.

**Note E-02 Salaries and Benefits – Programming Officer (1 FTE = \$45,000 @ 50%)**

This is a half-time position and would be responsible for the development of programming initiatives for the site. Previous experience in the area of public relations and programming would be helpful. This position may be time-shared with other sites/departments in order to attract the needed skill sets.

**Note E-03 Salaries and Benefits – Adm. Support/Gift Shop Staff (1 FTE = \$40,000 @ 50%)**

This is a half-time position and would be responsible for the delivery of administrative assistance to the Manager/Curator. The position would also serve as the central contact point for all matters relating to general information and gift shop issues. Previous experience in the area of administration and gift shop operations would be helpful.

This position may be time-shared with other sites/departments in order to attract the needed skill sets.

**Note E-04 Salaries and Benefits – Technician/Maintenance (1 FTE = \$45,000 @ 50%)**

This is a half-time position and would be responsible for the day-to-day care of the site including all aspects of building maintenance. It is understood that for some site equipment service contracts to specific agencies would be let. However, this position is to supervise those contracts and to insure that all work is performed to specifications. Some object handling and assistance with the development of in-house exhibits would also fall under the job description of this position. While technical positions are not usually part-time, this maintenance position can be placed under this category.

Previous experience in the area of technical museum work and building maintenance would be helpful. This position may be time-shared with other sites/departments in order to attract the needed skill sets.

**Note E-05 Salaries and Benefits – Core Staff Benefits (calculated at 36% of salaries)**

The consultants have been supplied the figure of 35% of salaries as being those normally applied by the City of Hamilton for benefits (Part time employees percentage is approximately 24%).

**Note E-06 Salaries and Benefits – Seasonal Staff (2 pers x 400 hrs @ \$15.00/ hr)**

In order to provide additional staff during the summer months, two persons are recommended for summer employment. We have provided for app. \$6,000 for each of these positions and included in the revenue side (see Note R-17) provisions for a grant to support 50% of these salaries. In the event that the grants should not be available, this category should be reduced to one student funded totally by the BCL.

**Note E-07 Salaries and Benefits – Seasonal Staff Benefits (Calculated at 20% of salaries)**

To cover areas such as mandatory vacation pay and health and other employment benefits

**Note E-08 Conservation – Supplies and Materials**

# Beach Canal Lighthouse Business Plan

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Although it is not anticipated that the BCL would have a major collection to curate, there would be areas of the site that would need care and attention in line with the principles of conservation and care of collections. We have provided a modest amount for the development of a preventive conservation program of such interpretive items as may be made available, either through gifts, loans from private individuals or from other sites within the City of Hamilton. We would recommend that BCL undertake only such conservation of museum objects as would normally be considered as preventative. In the event that any artefacts to be used by the BCL would need full conservation, such treatment be done by outside agencies on a contract basis or by sites within the City of Hamilton's heritage network that have the capabilities to perform such work.

**Note E-09 Conservation – Equipment**

As part of a program of preventative conservation it would be necessary for the BCL to monitor the environment within the site. This budget line would provide for the purchasing of some basic monitoring equipment such as data loggers to track relative humidity and temperatures. It is anticipated that two such loggers can be purchased in each of years one and two and from that point onward, any draws on this account would be minor in nature and represent only the acquisition of small pieces of equipment. We would recommend that BCL purchase electronic date loggers (i.e. ACR-Data Logger) for environmental monitoring and that such purchases be staged over a two-year period.

**Note E-10 Curatorial – Supplies**

This category provides for the purchase of items unique to the area of research and collections maintenance. It is from this category that monographs, special subject matter research tools such as books, would be drawn. Any materials needed in the cataloguing routine such as accessions folders, special inks, photo equipment etc. needed by the BCL would come from this expense line.

**Note E-11 Curatorial – Meetings / Conferences**

Conferences and workshops focusing specifically on the aspect of curatorial learning such as the Ontario Museum Association annual meeting and also that of the Canadian Museums Associations. It is anticipated that the Manager/Curator would be the principal user of this account.

**Note E-12 Curatorial – Special Professional Supplies**

From time to time special supplies would be required. This category can also be used for obtaining expert opinions on matters outside the expertise of the Curator.

**Note E-13 Curatorial – Travel**

This would cover any travel that is conducted specifically within the area of curatorial activities. Such travel would include, but not necessarily be limited to, travel to view special collections and to and from curatorial workshops and meetings.

**Note E-14 Outreach – Events and Activities**

This category would permit the BCL to take advantage of staging events and activities for the community within the confines of the BCL site. The category would also permit the staff to show appreciation to volunteers and other members of the community by staging special events targeted specifically at such support groups of the site.

**Note E-15 Outreach – Community Outreach**

This would allow the BCL to take part in special events staged by other organizations, but events where the BCL should have a presence. A special exhibit at a local heritage fair would be a typical example of this type of expenditure.

**Note E-16 Outreach – Education Program Supplies**

# Beach Canal Lighthouse Business Plan

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From time to time, it would be advantageous for the BCL to stage educational programs that may have some extraordinary program supply expense. Christmas programs, with a special event or activity or craft, may be funded from this expense line.

**Note E-17 Marketing and Communications – Brochures, Posters, Flyers**

A relatively modest amount has been allocated of this “off-site” printing. It is from here where the major marketing flyers/Brochures would be taken. It is anticipated that supplies would be printed in sufficient quantities to last for two or more years allowing for a diversification of printing jobs on an annual basis. eg. brochures one year and major posters a second, and so on.

**Note E-18 Marketing and Communications – In-house Orientation Printing**

With the establishment of desktop publishing, it is anticipated that the BCL staff would produce most of the day-to-day printing needs. This expense centre provides the resources for such printing. The materials costs for orientation maps, monthly or weekly program announcements and simple flyers would come from this category.

**Note E-19 Marketing and Communications – Advertising – Print, Radio, TV.**

It is anticipated that most media advertising from this category would be within the area of print (radio apparently does not work well in this market). TV advertising is outside the reach of most heritage sites and a high reliance on community TV and the public service elements of commercial TV would need to be explored fully. Even within the print media, this budget line is very limited and care must be taken on what events and in what media advertising is done. Other media, such as bus advertising, can be considered.

**Note E-20 Marketing and Communications – Special Marketing Initiatives**

For a full description of this expense area (year two through five) refer to section four of this report.

**Note E-21 Acquisitions – Purchases**

It is relatively rare for small heritage sites and community museums to have acquisition budgets. In the event that a “must have” object is offered for sale, the Curator usually maintains a list of individuals who have come forward as willing to purchase objects (with a stated limit) on behalf of the museum and then donate the object or the cash to the site. For this reason, no amount has been allocated for this line item.

**Note E-22 Acquisitions – Appraisals**

The Curator can appraise objects donated to the BCL up to a value of \$1,000 (for tax purposes). In the event that an object is offered to the BCL that exceeds that amount, appraisals can frequently be obtained at no cost to the organization through professional courtesies from established dealers who have the good of the institution in mind. A very modest figure has therefore been provided for appraisals.

**Note E-23 Displays – Permanent – Construction, Fabrication**

With a relatively small area for permanent exhibits this account is modest. However, it would permit for some minor changes in labelling and object placement and allows the curator the flexibility of developing new exhibition furniture where required.

**Note E-24 Displays – Temporary – Construction, Fabrication**

This would probably be limited to no more than one or two individual cases per year. The space is simply not available for major in-house temporary exhibits.

**Note E-25 Displays – Off-site Exhibits**

It is not anticipated that the BCL would be engaged in an active off-site exhibition program. From time to time opportunities may present themselves where a small exhibit would be advantageous at a location offered to the BCL. This category would allow such a program.

# Beach Canal Lighthouse Business Plan

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- Note E-26 Building Maintenance<sup>1</sup> – Lighthouse – Routine Repairs and Maintenance**  
Following a major restoration of the site, it is not anticipated that this category would need to be very large. This would change over time and as the restoration ages, maintenance costs would rise. However, this should not be a major problem for at least the first 10 to 15 years.
- Note E-27 Building Maintenance – Lighthouse – Utilities**  
Costs for utilities at the Lighthouse can be kept to an absolute minimum and it is recommended that only sufficient heat be maintained inside the structure to keep it in good repair. No workstations would be located within the Lighthouse.
- Note E-28 Building Maintenance – Lighthouse – Janitorial Supplies and Maintenance**  
Minimum Janitorial supplies are allocated within this budget line. The principle cost would be supplies for the care and maintenance of the interior of the structure.
- Note E-29 Building Maintenance – Lighthouse – Security Systems (Monitoring)**  
A security system should be installed as a part of the capital project. Monitoring of this system, for no more than two or three detectors should not reach more than \$250 per year, especially when coupled with the system provided for the Keeper’s Cottage (the Lighthouse would be viewed as one of the zones within this system).
- Note E-30 Building Maintenance – Lighthouse – HVAC Service Agreements**  
As noted above, it is not anticipated that either building would be equipped with complicated HVAC systems and therefore only a relatively small amount has been allocated for this cost.
- Note E-31 Building Maintenance – Lighthouse – Taxes**  
As it is assumed that the City of Hamilton would become the owner of this property, there should be no property taxes levied against it nor would there be offered grants in lieu of taxes.
- Note E-32 Building Maintenance – Keeper’s Cottage – Routine Repairs Maintenance**  
As noted above, following a major capital restoration of the site, it is not anticipated that this category would need to be very large. However, more assets would need to assigned to the Keeper’s Cottage than to the Lighthouse as a result of the additional wear and tear on this property. In addition it is here where most of the interpretive activities would take place and the cottage must be maintained at a level greater than that of most homes of the same size.
- Note E-33 Building Maintenance – Keeper’s Cottage – Utilities**  
As this would be the principle work site for some of the staff, the building would need to be maintained not only at a level suitable for the housing of artefacts, but also for the comfort of visitors and staff.
- Note E-34 Building Maintenance – Keeper’s Cottage – Janitorial Supplies and Maintenance**  
Washrooms and general building maintenance would both draw on this line item.
- Note E-35 Building Maintenance – Keeper’s Cottage – Grounds Maintenance**  
To provide for the upkeep of the grounds including snow removal in winter. A grounds plan would need to be designed that complements the two structures and “binds” them together as a single site. This account would provide the expenses, with the small amount set aside under the Lighthouse accounts for this service.
- Note E-36 Building Maintenance – Keeper’s Cottage – HVAC Service Agreements**

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<sup>1</sup> Note that the costs identified are to provide an overall picture. Not all identified costs would be directly from the museum budget – some, such as maintenance, would be covered by various City sections and departments.

# Beach Canal Lighthouse Business Plan

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Although presented here as two separate line items (Tower and Cottage) it is assumed that this service contract can be one and the same. As noted above, there should be relatively few issues for the first 10 to 15 years of operation recognizing that the systems would be new. In year one, all of these systems should be covered by warranties.

**Note E-37 Building Maintenance – Keeper’s Cottage – Taxes**

See Note 31

**Note E-37a Insurance**

As the city self-insures, this note has been added in the assumption that there will be the assumption of some liability for the site.

**Note E-38 Gift Shop – Merchandise for re-sale (50%)**

As seen above it is recommended that a small gift shop be operated. A conservative 50% markup on all giftware is recommended (although figures tend to vary). This amount is reflected in the profit margin of this operation.

<u>Gift Shop Profit (Not inc. Staff)</u>	<u>Five Year Projection (Option One)</u>				
	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>
Gift Shop Revenue	39,700	39,700	41,900	41,900	43,350
Gift Shop Expenses	26,500	25,200	27,000	28,000	30,500
<b>TOTAL Gift Shop Profit</b>	<b><u>13,200</u></b>	<b><u>14,500</u></b>	<b><u>14,900</u></b>	<b><u>13,900</u></b>	<b><u>12,850</u></b>

**Note E-39 Gift Shop – Books for re-sale (60%)**

A 60% markup is recommended for the resale of all reading materials.

**Note E-40 Gift Shop – Consignment Sales**

As noted above, it is recommended that a system of consignment sales be organized. Because of the staff time required to administer this it is recommended that 75% be added to the fees requested by the artist/maker – some consignment sales can be too troublesome to consider.

**Note E-41 Gift Shop - Supplies**

Custom bags (branding), cash register tapes, gift boxes, etc are covered by this account.

<u>Gift Shop Sales over Annual Attendance</u>	<u>Five Year Projection (Option One)</u>				
	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>
Gift Shop Sales	39,700	39,700	41,900	41,900	43,350
Annual Attendance	21,400	24,500	26,900	29,100	31,400
<b>TOTAL Gift Shop Profit per visitor</b>	<b><u>1.86</u></b>	<b><u>1.62</u></b>	<b><u>1.56</u></b>	<b><u>1.44</u></b>	<b><u>1.38</u></b>

**Note E-42 Administration – Office Supplies**

Standard office supplies such as paper, pencils, pens, etc are recovered from this portion of the budget.

**Note E-43 Administration – Office Equipment Service Agreements**

Costs of operating photocopying equipment and maintenance costs on computer systems are charged to this account.

**Note E-44 Administration – Institutional Memberships**

Special membership fees to organizations that cater specifically to the advancement of research into lighthouses or assists in protecting the heritage of such sites are covered by this category.

# Beach Canal Lighthouse Business Plan

## OPTION 2

### **A year round operation within the introduction of a separate purpose-built building for an interpretive centre focused on the Beach Canal Lighthouse site**

This option calls for the full restoration of both the Lighthouse and Keeper's Cottage. All visitor support services would be provided through a purpose-built interpretive center that would also function as the staff and curatorial support center for the site.

### **Opinion of Cost**

The base point for the Opinion of Cost for Option 2 is presented under Option 1 and expanded to include the installation of an interpretive facility and site improvements.

Item	Budget
Total budget for Lighthouse restoration based on Option 1	632,500
Total budget for Keeper's Cottage based on Option 1	241,500
Budget for new Interpretive Centre based on 10,000 square feet at a cost of \$ 300 per square	3,000,000
Allowance for landscape, parking access, and other site improvements	250,000
<b>Total preliminary costs for Option 2</b>	<b>\$ 4,124,000</b>

As noted under Option 1, the opinions of cost provided are based on current conditions at the time of this report. The amounts are presented in current dollars to the date of the report but are not escalated into the future. As the proposed visitor centre is not designed, we have provided an approximate cost on a per square foot basis, which is based on average costs of other such sites at the time of writing this report.

The opinions of cost will be subject to prevailing market conditions, escalations or reductions in material and labour costs over which we, and our sources, have no control. The amounts could have a range of +/- 20% depending on market conditions at the time of the work.

### **Staffing and Expenses**

Under this full-time operation option the site would be operated at a level of professional maturity enjoyed by the other heritage sites managed by the City of Hamilton. The Lighthouse and the Keeper's Cottage would be open to the public on a year round basis and employ a full-time Manager, Administrative Support/Gift Shop person and a full time Museum Technician/Maintenance person. In addition to this staffing, a part time (50%) Programming Officer and three seasonal staff members are recommended<sup>2</sup>. A reliance on volunteer staff is assumed and members of the BCLG have expressed an interest in maintaining their involvement with the site, not only under Option 1, but also under this Option.

The site would, as in the previous option, be open well over the minimum requirements for a full-time museum as defined by the Ontario Ministry of Culture and employ one full-time dedicated staff member (Manager/Curator) to oversee the operation, which would qualify the site for membership in the provincial Community Museum Operating Grant program (CMOG) - the only mandated museum grants programme in the province.

<sup>2</sup> This is the minimum although, if funds permitted, a full-time programming officer plus three part time interpreters + volunteers would provide a more comprehensive service.

# Beach Canal Lighthouse Business Plan

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The City of Hamilton’s annual contribution to this site under this option is estimated at \$163,000 in year one increasing to \$216,500 in year five. The major portion of this increase is in response to the assumption that staff would move through the established grid at an incremental rate of approximately 3% per year. As is the case with all budget figures, we have not applied inflationary increases. All increases in budget lines are a result of general increases in programming activities and the wear and tear on the building fabric.

Both the Lighthouse and Keeper’s Cottage would be open to the public at all times when the site is open. Option 2 is viewed primarily as a “stand-alone” heritage site offering such staff and curatorial support elements as required. All staffing positions would be housed within the interpretive center.

<b>Cost of Operations per Visitor</b>	<b>Five Year Projection (Option 2)</b>				
	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
Total Operating Costs	399,045	425,930	457,535	483,495	510,335
Annual Attendance	31,300	33,200	35,900	38,300	39,900
<b>TOTAL Cost / Visitor</b>	<b>12.75</b>	<b>12.83</b>	<b>12.74</b>	<b>12.62</b>	<b>12.79</b>

All site interpretation, gift shop functions as well as public washrooms would be housed within the interpretive center. In a best-case scenario, the center would be within easy walking distance of the Lighthouse and Keeper’s Cottage preferably with a strong visual connection.

One of the main strengths of this option is that the heritage elements of the site would be without the intrusion of museological support functions and would permit for the full interpretation of not only the Lighthouse but also the Keeper’s Cottage as period pieces, inside and out.

# Beach Canal Lighthouse Business Plan

<b>INCOME SUMMARY</b>	<b>Five Year Projection (Option 2)</b>				
	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
1 Brought Forward	0	0	0	0	0
2 Core Activities	131,795	139,680	151,485	161,445	168,585
3 Donations	9,000	10,000	11,000	12,000	13,000
4 Endowments and Trusts	0	0	0	0	0
5 Gift Shop	65,250	68,250	73,050	76,050	79,250
6 Municipality	163,000	177,000	190,000	202,000	216,500
7 Rent	1,000	2,000	3,000	3,000	4,000
8 Grant - Province of Ontario (CMOG)	20,000	20,000	20,000	20,000	20,000
9 Grant - Federal	9,000	9,000	9,000	9,000	9,000
<b>TOTAL MUSEUM INCOME</b>	<b>399,045</b>	<b>425,930</b>	<b>457,535</b>	<b>483,495</b>	<b>510,335</b>

<b>EXPENSE SUMMARY</b>	<b>Five Year Projection (Option 2)</b>				
	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
10 Salaries and Benefits	254,160	259,336	267,608	274,544	281,536
11 Conservation	4,200	4,200	4,800	4,900	5,400
12 Curatorial	8,300	8,800	10,300	10,300	11,300
13 Outreach	10,300	12,300	13,800	15,300	16,300
14 Marketing and Communication	28,000	38,300	48,300	58,300	68,300
15 Acquisitions	1,000	1,100	1,100	1,400	1,400
16 Displays	10,500	14,000	15,000	16,000	16,000
17 Building Maintenance	28,900	33,300	38,150	41,050	44,300
18 Gift Shop	41,500	42,200	45,500	48,500	52,000
19 Administration	11,300	11,500	12,500	12,700	13,300
<b>TOTAL MUSEUM EXPENSES</b>	<b>398,160</b>	<b>425,036</b>	<b>457,058</b>	<b>482,994</b>	<b>509,836</b>

On the following pages are the budget spreadsheets for Revenue and Expenditures for Option 2. Following each sheet, we include budget notes for the detailed sheets for OPTION 2. “R” Notes (R-02) are notes related to Revenue and “E” Notes reference Expenditures. While many of the Notes are essentially the same for this option as compared with Option One, they have been repeated here so that this option may be looked at in isolation.

# Beach Canal Lighthouse Business Plan

DETAILED REVENUE	Note	Five Year Projection (Option 2)				
		1	2	3	4	5
<b>1 Brought Forward</b>						
Brought Forward	<b>R-01</b>	0	0	0	0	0
1 TOTAL Brought Forward		<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
<b>2 Core Activities</b>						
Admission Revenue	<b>R-02</b>	129,895	137,780	148,985	158,945	165,585
Special Program Revenue	<b>R-03</b>	1,900	1,900	2,500	2,500	3,000
2 TOTAL Core Activities		<u>131,795</u>	<u>139,680</u>	<u>151,485</u>	<u>161,445</u>	<u>168,585</u>
<b>3 Donations</b>						
Individual (Donation Box)	<b>R-04</b>	3,000	3,500	4,000	4,500	5,000
Individual (General)	<b>R-05</b>	2,000	2,000	2,000	2,500	2,500
Corporate	<b>R-06</b>	4,000	4,500	5,000	5,000	5,500
3 TOTAL - Donations		<u>9,000</u>	<u>10,000</u>	<u>11,000</u>	<u>12,000</u>	<u>13,000</u>
<b>4 Endowments and Trusts</b>						
Endowments	<b>R-07</b>	0	0	0	0	0
Trusts	<b>R-08</b>	0	0	0	0	0
4 TOTAL Endowments and Trusts		<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>	<u>0</u>
<b>5 Gift Shop</b>						
Merchandise for re-sale (50%)	<b>R-09</b>	15,000	18,000	18,000	21,000	21,000
Books for re-sale (60%)	<b>R-10</b>	24,000	24,000	28,800	28,800	32,000
Consignment Sales (Pay back-75%)	<b>R-11</b>	26,250	26,250	26,250	26,250	26,250
5 TOTAL - Gift Shop		<u>65,250</u>	<u>68,250</u>	<u>73,050</u>	<u>76,050</u>	<u>79,250</u>
<b>6 Municipality</b>						
Operating Contribution - City of Hamilton	<b>R-12</b>	164,000	177,000	190,000	202,000	216,500
Municipal Grant (other)	<b>R-13</b>	0	0	0	0	0
6 TOTAL Municipality		<u>163,000</u>	<u>177,000</u>	<u>190,000</u>	<u>202,000</u>	<u>216,500</u>
<b>7 Rent</b>						
Special Events	<b>R-14</b>	500	1,000	1,500	1,500	2,000
Community Groups		500	1,000	1,500	1,500	2,000
7 TOTAL - Rent		<u>1,000</u>	<u>2,000</u>	<u>3,000</u>	<u>3,000</u>	<u>4,000</u>
<b>8 Grant - Province of Ontario (CMOG)</b>						
CMOG	<b>R-15</b>	20,000	20,000 #	20,000	20,000	20,000
Misc. Provincial Grants	<b>R-16</b>	0	0	0	0	0
8 TOTAL - Grant, Province of Ont.		<u>20,000</u>	<u>20,000</u>	<u>20,000</u>	<u>20,000</u>	<u>20,000</u>
<b>9 Grant - Federal</b>						
Student Wage Subsidy (Cdn Wks)	<b>R-17</b>	9,000	9,000	9,000	9,000	9,000
9 TOTAL - Grants - Federal		<u>9,000</u>	<u>9,000</u>	<u>9,000</u>	<u>9,000</u>	<u>9,000</u>
<b>TOTAL REVENUE</b>		<u><b>399,045</b></u>	<u><b>425,930</b></u>	<u><b>457,535</b></u>	<u><b>483,495</b></u>	<u><b>510,335</b></u>

## REVENUE

### Note R-01 Brought Forward

This budget line is left with a "0" balance. It is assumed that budget planning would be based on a "not-for-profit" model and that each year the budget base would start from a neutral position. However, in the event that surpluses (or deficits) are carried forward as a means of financial policy, this category would provide for that function. Within this budget forecast there is a small surplus recorded for each year of operation. For the sake of simplicity, this surplus has NOT been brought forward. The assumption is made that each year starts with a 0 balance from the year before.

# Beach Canal Lighthouse Business Plan

## Note R-02 Core Activities – Admissions Revenue

One of the principal revenue streams from this operation would be admissions revenue. We have analyzed the admissions rates at the five sites operated by the City of Hamilton and estimated, based on similar sites of similar scope of programmes and size, and developed a forecast of visitor flow that is based on a moderately aggressive advertising and marketing

CITY OF HAMILTON OWNED HERITAGE SITES	ANNUAL ATTENDANCE				
	2003	2004	2005	2006	2007
Whitehern Historic House	6,596	6,010	4,605	5,998	6,546
Dundurn National His. Site	68,076	65,507	64,073	48,818	53,703
Children's Museum	24,752	21,287	19,883	18,105	17,556
Museum of Steam and Tech	14,041	13,262	13,050	11,312	12,388
Battlefield House Museum	9,865	15,353	11,079	17,077	22,210
<b>ANNUAL TOTAL</b>	<b>123,330</b>	<b>121,419</b>	<b>112,690</b>	<b>101,310</b>	<b>112,403</b>

Attendance Projections (Year One)	Mo	Five Year Projection (Option 2)				
		1	2	3	4	5
	JAN	500	500	700	700	800
	FEB	800	800	1,000	1,200	1,400
The Ontario Ministry of Culture definition for CMOG applicants as a "Full Time Museum" requires a site to be open to the public	MAR	1,500	1,500	1,800	1,800	2,000
	APR	2,000	2,200	2,200	2,400	2,500
for a minimum of 1,080 hours per year during a minimum of 8 months in that year and must have a minimum of one person working full-time as the site curator or manager.	MAY	2,000	2,400	2,600	2,800	3,000
	JUN	3,000	3,000	3,200	3,400	3,500
	JUL	7,500	7,500	8,000	8,000	8,500
	AUG	7,500	7,500	8,000	8,500	8,500
	SEP	2,500	2,800	3,000	3,500	3,500
A seasonal operation is anything less than these requirements	OCT	1,500	2,000	2,400	2,600	2,800
	NOV	1,000	1,200	1,200	1,400	1,400
	DEC	1,500	1,800	1,800	2,000	2,000
	<b>TOT</b>	<b>31,300</b>	<b>33,200</b>	<b>35,900</b>	<b>38,300</b>	<b>39,900</b>

## Note R-03 Core Activities – Special Programmes

These are programs that relate specifically to the site. These can include lectures by staff and invited guests. This option would permit not only for an aggressive programming package to take place, but would also permit for site rentals as a means of revenue. Income can be generated, for example, from the rental of meeting rooms or foyer and galleries for special events. With the visitor centre, these events can be held on site as opposed to Option One.

Revenue based on Admissions Charges	@	Five Year Projection (Option 2)				
		1	2	3	4	5
Adult - General Admissions	5.00	46,950	49,800	53,850	57,450	59,850
Student - General Admissions	4.00	6,260	6,640	7,180	7,660	7,980
Child - General Admissions	3.00	14,085	14,940	16,155	17,235	17,955
School Program Admissions	4.00	37,560	39,840	43,080	45,960	47,880
Group Tours Admissions	4.00	12,520	13,280	14,360	15,320	15,960
Special Events Admissions	4.00	12,520	13,280	14,360	15,320	15,960
		<b>129,895</b>	<b>137,780</b>	<b>148,985</b>	<b>158,945</b>	<b>165,585</b>

## Note R-04 Donations – Individual (Donation Box)

It is recommended that the site establish a donation box in the vicinity of the front desk and admissions area. Most sites of this size and scope with the projected attendance figures

# Beach Canal Lighthouse Business Plan

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included in this business plan can expect to gain between \$3,000 and \$5,000 annually from a simple request for help.

**Note R-05 Donations - General (General)**

Donations that are outside the noted area above, such as gifts that arrive in the mail or in other ways, but NOT through the donation box at the front desk.

**Note R-06 Donations – Corporate**

Financial gifts from organizations that wish to support the aims and objectives of the site. These can be the results of staff/Board approaches to specific organizations as well as unsolicited gifts.

**Note R-07 Endowments and Trusts - Endowments**

Endowments and Trusts require substantial amounts of work and commitment to raising these types of funds. It is recommended that the BCL consider the establishment of an Endowment Campaign for the specific purpose of supporting the operations and programmes.

**Note R-08 Endowments and Trusts – Trusts**

See above.

**Note R-09 Gift Shop – Giftware**

A gift shop can provide a small revenue centre to assist in the operation of the site. However, most frequently such an operation must be viewed as a visitor service rather than a major retail outlet. Space should be provided near the information and reception counter of the Interpretive Center for a small Gift Shop. It is further recommended that this space be a minimum of 400 square feet in order to provided for the attractive display of giftware without appearing to be overcrowded.

**Note R-10 Gift Shop – Books**

As with Giftware, it is anticipated that book sales would be specific to the site and focus on the general theme of Lighthouses, City of Hamilton history and Great Lakes navigation.

**Note R-11 Gift Shop – Consignment Sales**

Consignment sales can be a relatively inexpensive way to stock a gift shop. However, it also represents a substantial commitment of staff time. Good quality control of the material offered for sale must be maintained and staff must be prepared to offend some members of the community from time to time. This area is one that lends itself well to a volunteer coordinator.

**Note R-12 Municipality – Operating Contribution – City of Hamilton**

The operating budget of the BCL would require a contribution of \$167,000 in year one from the City of Hamilton. In the proposal we have used salary figures supplied by City staff and applied an approximate benefit package that reflects what staff costs currently are for the City. It is noted here that the staff costs are considerably higher than the contribution from the City. It is also noted that the projected city contribution grows by approximately 4-5% per year over the five years covered by this forecast. There are modes incremental growths built in to salary increases that are larger than the City's increase in operating contributions (see discussion on NOTE E-01/07).

**Note R-13 Municipality – Municipal Grant (other)**

From time to time the Municipality may wish to provide a special grant for a specific project. However, such grants cannot form part of an operating forecast at this time as any such projects would be funded through the capital budget process and would exist outside the operations budget. However, there might, from time to time with appropriate promotion, be grants made available from neighbouring municipalities.

## Beach Canal Lighthouse Business Plan

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**Note R-14 Rent – Special Events**

With the availability of spaces such as meeting rooms, the Interpretive Foyer and a temporary exhibition gallery, community groups may wish to make use of the facility for non-traditional heritage activities and receptions. This can be translated into a model revenue source. For the purposes of this budget an estimate of \$500 in year one, growing to \$2,000 in year five have been made.

**Note R-15 Grants – Province of Ontario – Community Museum Operating Grant**

As a full time (more than 1,080 hours of posted public access over a minimum of 8 months per year, and with one full time staff member dedicated solely to the management of this site) the Beach Canal Lighthouse qualifies for this statutory grant program. The program is based on the annual expenditures of the site (using the previous year financial statements) and given the projected operational budget it is estimated that the annual CMOG contribution would be in the range of \$20,000. It is noted here, however, that there is considerable ministerial discretion on the amount received by individual organizations, but the current pattern reflects that this amount is achievable. There are, however, no promises given for this grant – the City would have to work with the Ministry of Culture Staff to ensure eligibility.

**Note R-16 Grants – Province of Ontario – Misc. Provincial Grants**

From time to time the Province may introduce program specific grants. In the event that such a program grant is made available (upon application) the BCL should seek such funding. However, applications for these grants should not place an undue burden on staff and the programme must be assessed as being of direct benefit to the site.

**Note R-17 Grant – Federal – Student Wage Subsidy (Cdn Wks)**

The Federal Government has a long history of supporting student employment. These programs are frequently offered at a 50% to 60% subsidy. This program has been included in this budget but should it not be available, the summer student employment indicated in this budget may have to be reduced by 50%.

# Beach Canal Lighthouse Business Plan

## DETAILED EXPENSES

	Note	Five Year Projection (Option 2)				
		1	2	3	4	5
<b>10 Salaries and Benefits</b>						
Director/Curator/Manager (1 FTE=\$68,000 @ 100%)	E-01	68,000	69,500	71,500	73,000	74,500
Programming Officer (1 FTE = \$ 45,000 @ 50%)	E-02	22,500	23,000	23,600	24,200	24,800
Adm. Support/Gift Shop Staff (1 FTE = \$ 40,000 @ 100%)	E-03	40,000	41,200	42,400	43,600	44,800
Technician/Maintenance (1 FTE = \$ 45,000 @ 100%)	E-04	45,000	46,400	47,800	49,600	51,000
Core Staff Benefits (calculated at 36% of salaries)	E-05	56,160	64,836	66,708	68,544	70,236
Seasonal Staff (3 pers x 400 hrs @ \$15.00 / hr)	E-06	18,000	12,000	13,000	13,000	13,500
Seasonal Staff Benefits (calculated at 20% of salaries)	E-07	4,500	2,400	2,600	2,600	2,700
<b>10 TOTAL - Salaries and Benefits</b>		<b>254,160</b>	<b>259,336</b>	<b>267,608</b>	<b>274,544</b>	<b>281,536</b>
<b>11 Conservation</b>						
Supplies and Materials	E-08	2,000	2,000	2,500	2,500	3,000
Equipment	E-09	2,000	2,000	2,000	2,000	2,000
Miscellaneous Conservation		200	200	300	400	400
<b>11 TOTAL - Conservation</b>		<b>4,200</b>	<b>4,200</b>	<b>4,800</b>	<b>4,900</b>	<b>5,400</b>
<b>12 Curatorial</b>						
Supplies	E-10	3,000	3,000	3,500	3,500	4,000
Meetings / Conferences	E-11	2,000	2,000	2,500	2,500	2,500
Specific Professional Supplies	E-12	1,500	1,500	1,500	1,500	1,500
Travel	E-13	1,500	2,000	2,500	2,500	3,000
Miscellaneous Curatorial		300	300	300	300	300
<b>12 TOTAL - Curatorial</b>		<b>8,300</b>	<b>8,800</b>	<b>10,300</b>	<b>10,300</b>	<b>11,300</b>
<b>13 Outreach</b>						
Events and Activities	E-14	4,000	5,000	5,500	6,000	6,500
Community Outreach	E-15	4,000	4,500	5,000	5,500	5,500
Education Program Supplies	E-16	2,000	2,500	3,000	3,500	4,000
Miscellaneous - Outreach		300	300	300	300	300
<b>13 TOTAL - Outreach</b>		<b>10,300</b>	<b>12,300</b>	<b>13,800</b>	<b>15,300</b>	<b>16,300</b>
<b>14 Marketing and Communications</b>						
Brochures, Posters, Flyers	E-17	20,000	25,000	25,000 #	25,000	25,000
In-house Orientation Printing	E-18	3,000	3,500	4,000	4,500	5,000
Advertising - Print, Radio, TV.	E-19	3,500	4,000	4,000	4,500	4,500
Special Marketing Initiatives (See Section 3 of report)	E-20	1,000	5,300	14,800	23,800	33,300
Miscellaneous - Advertising		500	500	500	500	500
<b>14 TOTAL - Marketing and Communication</b>		<b>28,000</b>	<b>38,300</b>	<b>48,300</b>	<b>58,300</b>	<b>68,300</b>
<b>15 Acquisitions</b>						
Purchases	E-21	0	0	0	0	0
Customs, Duty, Taxes		0	0	0	0	0
Transportation, Shipping		600	600	600	800	800
Appraisals	E-22	200	300	300	400	400
Miscellaneous - Acquisitions		200	200	200	200	200
<b>15 TOTAL - Acquisitions</b>		<b>1,000</b>	<b>1,100</b>	<b>1,100</b>	<b>1,400</b>	<b>1,400</b>
<b>16 Displays</b>						
Permanent - Construction, Fabrication	E-23	3,000	5,000	5,000	5,000	5,000
Temporary - Construction, Fabrication	E-24	3,000	4,000	5,000	6,000	6,000
Off-site Exhibits	E-25	1,500	1,500	1,500	1,500	1,500
Photography, text panels, etc.		2,000	2,500	2,500	2,500	2,500
Miscellaneous - Displays		1,000	1,000	1,000	1,000	1,000
<b>16 TOTAL - Displays</b>		<b>10,500</b>	<b>14,000</b>	<b>15,000</b>	<b>16,000</b>	<b>16,000</b>

# Beach Canal Lighthouse Business Plan

## DETAILED EXPENSES (Cont.)

	Note	Five Year Projection (Option 2)				
		1	2	3	4	5
<b>17 Building Maintenance</b>						
<b>Lighthouse</b>						
Routine Repairs and Maintenance	E-26	1,500	1,500	1,500	1,500	1,500
Utilities	E-27	500	600	700	800	900
Janitorial Supplies and Maintenance	E-28	200	200	200	200	200
Grounds Maintenance		400	400	500	500	600
Security Systems (Monitoring)	E-29	250	250	250	250	250
HVAC Service Agreements	E-30	250	250	300	300	350
Taxes	E-31	0	0	0	0	0
Insurance (Property, Liability & Equipment)		800	800	900	900	1,000
Miscellaneous - Lighthouse		100	100	100	100	100
SUB-TOTAL - Lighthouse		4,000	4,100	4,450	4,550	4,900
<b>Keeper's Cottage</b>						
Routine Repairs and Maintenance	E-32	1,500	1,500	1,500	1,500	1,500
Utilities	E-33	1,500	1,800	2,000	2,300	2,500
Janitorial Supplies and Maintenance	E-34	1,000	1,000	1,000	1,000	1,000
Grounds Maintenance	E-35	800	800	1,000	1,000	1,200
Security Systems (Monitoring)		400	400	400	400	400
HVAC Service Agreements	E-36	600	600	800	800	1,000
Taxes	E-37	0	0	0	0	0
Insurance (Property, Liability & Equipment)		800	800	900	900	1,000
Miscellaneous - Keeper's Cottage		300	300	300	300	300
SUB-TOTAL - Keeper's Cottage		6,900	7,200	7,900	8,200	8,900
<b>Interpretive Center</b>						
Routine Repairs and Maintenance	E-38	2,000	3,000	4,000	5,000	5,000
Utilities	E-39	8,000	8,500	9,000	9,500	10,000
Janitorial Supplies and Maintenance	E-40	1,000	3,000	3,500	4,000	4,000
Grounds Maintenance	E-41	2,000	2,000	2,500	2,500	3,000
Security Systems (Monitoring)		500	500	500	500	500
HVAC Service Agreements	E-42	1,500	1,500	2,500	2,500	3,500
Taxes	E-43	0	0	0	0	0
Insurance (Property, Liability & Equipment)		2,500	2,500	2,800	2,800	3,000
Miscellaneous - Keeper's Cottage		500	1,000	1,000	1,500	1,500
SUB-TOTAL - Interpretive Center		18,000	22,000	25,800	28,300	30,500
17 TOTAL - Building Maintenance		28,900	33,300	38,150	41,050	44,300
<b>18 Gift Shop</b>						
Merchandise for re-sale	E-44	10,000	12,000	12,000	14,000	14,000
Books for re-sale	E-45	15,000	15,000	18,000	18,000	20,000
Consignment Sales	E-46	15,000	15,000	15,000	15,000	15,000
Gift Shop Supplies	E-47	1,500	200	500	1,500	3,000
18 TOTAL - Gift Shop		41,500	42,200	45,500	48,500	52,000
<b>19 Administration</b>						
Office Supplies	E-48	2,500	2,500	2,800	2,800	3,000
Office Equipment Service Agreements	E-49	1,000	1,000	1,000	1,000	1,000
Postage		1,500	1,700	1,900	2,100	2,300
Telephone		1,500	1,500	1,800	1,800	1,800
Internet Charges		500	500	500	500	500
Accounts and Audits		2,500	2,500	2,700	2,700	2,900
Bank Charges		500	500	500	500	500
Institutional Memberships	E-50	800	800	800	800	800
Miscellaneous - Maintenance		500	500	500	500	500
19 TOTAL - Administration		11,300	11,500	12,500	12,700	13,300
<b>20 Bring Forward</b>						
Surplus (-Deficit)		885	894	477	501	499
20 TOTAL - Bring Forward		885	894	477	501	499
<b>TOTAL - EXPENSES</b>		<b>398,160</b>	<b>425,036</b>	<b>457,058</b>	<b>482,994</b>	<b>509,836</b>
<b>TOTAL - REVENUE</b>		<b>399,045</b>	<b>425,930</b>	<b>457,535</b>	<b>483,495</b>	<b>510,335</b>

# Beach Canal Lighthouse Business Plan

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## EXPENSES

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**Note E-01 Salaries and Benefits – Director/Curator/Manager (1 FTE = \$68,000 @ 100%)**

Based on information obtained from the city staff, the consultants have estimated that the senior person employed at this site (City employee) would most likely be placed in a salary grid at a starting level of \$68,000 per year. We have not offered a title for this position, but it is noted that depending on the employer, one of the three options offered above may be appropriate. The job specifications for this position should include experience with the operation of a small heritage site, preferably in the municipal sector. A minimum of 5 years experience would be an asset as it is viewed as a “self starting” position. This should be viewed as a jr. management position with the candidate holding, at a minimum an undergraduate degree, but preferably with some post graduate experience.

This position has an element of supervisory responsibility of two full time and several part time staff as well as the need to organize and implement annual budgets of between \$400,000 and \$550,000.

Incremental increases have been provided over the five-year forecast consistent with most grid movements at the municipal level. There are no inflationary increments in this budget.

**Note E-02 Salaries and Benefits – Programming Officer (1 FTE = \$45,000 @ 50%)**

This is a half-time position and would be responsible for the development of programming initiatives for the site. Previous experience of the area of public relations and programming would be helpful. This position may be time-shared with other sites/departments in order to attract the needed skill sets.

**Note E-03 Salaries and Benefits – Adm. Support/Gift Shop Staff (1 FTE = \$40,000 @ 100%)**

This is a full position and would be responsible for the delivery of administrative assistance to the Manager/Curator. The position would also serve as the central contact person for all matters relating to general information and gift shop issues for the site. Previous experience of the area of administration and gift shop operations would be helpful.

**Note E-04 Salaries and Benefits – Technician/Maintenance (1 FTE = \$45,000 @ 100%)**

This is a full-time position and would be responsible for the day-to-day care of the site including all aspects of building maintenance. It is understood that for some site equipment service contracts to specific agencies would be let. However, this position is to supervise those contracts and to insure that all work is performed to specifications. Some object handling and assistance with the development of in-house exhibits would also fall under the job description of this position.

This position would also assist in the fabrication and installation of all exhibits within the Interpretive Center and where necessary, assist with the development of period interiors for the Keeper’s Cottage.

Previous experience of the area of technical museum work and building maintenance would be helpful. This position may be time-shared with other sites/departments in order to attract the needed skill sets.

**Note E-05 Salaries and Benefits – Core Staff Benefits (calculated at 36% of salaries)**

The consultants have been supplied the figure of 36% of salaries as being those normally used as benefit levels within the City of Hamilton.

**Note E-06 Salaries and Benefits – Seasonal Staff (3 pers x 400 hrs @ \$15.00/ hr)**

In order to provide additional staff during the summer months, three persons are recommended for summer employment. We have provided for app. \$6,000 for each of these

# Beach Canal Lighthouse Business Plan

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positions and included in the revenue side (see Note R-17) provisions for a grant to support 50% of these salaries. In the event that the grants should not be available, this category should be reduced to one student funded totally by the BCL.

**Note E-07 Salaries and Benefits – Seasonal Staff Benefits (Calculated at 20% of salaries)**

To cover areas such as mandatory vacation pay and health and other employment benefits

**Note E-08 Conservation – Supplies and Materials**

Although it is not anticipated that the BCL would have a major collection to curate, there would be areas that would need the attention of conservation and museum principles of care of collections. We have provided a modest amount to the development of preventive conservation program of such interpretive items as may be made available, either through gifts, loans from private individuals or from other sites within the City of Hamilton heritage network. The Interpretive Centre would have an area for artefact storage and this space would need to have conservation issues addressed. The mandate of the site would need to be expanded to deal with the Beach area, Transportation and changing architecture (both industrial and architectural). This would, from time to time, mean an increase of collections that would need conservation treatment. It is not proposed that a conservation lab be included in the interpretive centre, however, space for “passive conservation” treatment and object isolation would be needed. We recommend that the BCL undertake only such conservation of museum objects as would normally be considered as preventative. In the event that any artefacts need full conservation, such treatment would be done by outside agencies or by sites within the City of Hamilton’s heritage network.

**Note E-09 Conservation – Equipment**

As part of a program of preventative conservation it would be necessary for the BCL to monitor the environment within the site. This budget line would provide for the purchasing of some basic monitoring equipment such as data loggers to track relative humidity and temperatures. It is anticipated that two such loggers can be purchased in each of years one and two and from that point onward, any draws on this account would be minor in nature and represent only the acquisition of small pieces of equipment. We recommend that the BCL purchase electronic date loggers for environmental monitoring and that such purchases be staged over a two to three year period.

**Note E-10 Curatorial – Supplies**

This category provides for the purchase of items unique to the area of research and collections maintenance. It is from this category that monographs, including special subject matter for research tools such as books, would be drawn. Any materials needed in the cataloguing routine such as accessions folders, special inks, photo equipment etc. needed by the BCL would come from this expense line.

**Note E-11 Curatorial – Meetings / Conferences**

Conferences and workshops focusing specifically on the aspect of curatorial learning such as the Ontario Museum Association annual meeting and also that of the CMA. It is anticipated that the Manager/Curator would be the principal user of this account.

**Note E-12 Curatorial – Special Professional Supplies**

From time to time special supplies would be required. This category can also be used for the obtaining of expert opinions on matters outside the expertise of the Curator.

**Note E-13 Curatorial – Travel**

This would cover any travel that is conducted specifically within the area of curatorial activities. Such travel would include, but not necessarily be limited to travel to view special collections and to and from curatorial workshops and meetings.

**Note E-14 Outreach – Events and Activities**

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This category would permit the BCL to take advantage of staging events and activities for the community within the confines of the BCL site. The category would also permit the staff to show appreciation to volunteers and other members of the community by staging special events targeted specifically at such support groups of the site.

**Note E-15 Outreach – Community Outreach**

This would allow the BCL to take part in special events staged by other organizations, but events where the BCL should have a presence. A special exhibit at a local heritage fair would be a typical example of this type of expenditure.

**Note E-16 Outreach – Education Program Supplies**

From time to time, it would be advantageous for the BCL to stage educational programs that may have some extraordinary program supply expense. Christmas programs, with a special event or activity or craft may be funded from this expense line.

**Note E-17 Marketing and Communications – Brochures, Posters, Flyers**

A relatively modest amount has been allocated to this “off-site” printing. It is here that the major marketing flyers/Brochures would be funded. It is anticipated that supplies would be printed in sufficient quantities to last for two or more years allowing for a diversification of printing jobs on an annual basis. Brochures one year and major posters a second, and so on.

**Note E-18 Marketing and Communications – In-house Orientation Printing**

With the establishment of desktop publishing, it is anticipated that the BCL staff would produce most of the day-to-day printing needs. This expense centre provides the resources for such printing. The materials costs for orientation maps, monthly or weekly program announcements and simple flyers would come from this category.

**Note E-19 Marketing and Communications – Advertising – Print, Radio, TV.**

It is anticipated that most media advertising from this category would be within the area of the print or radio area. TV advertising is outside the reach of most heritage sites and a high reliance on community TV and the public service elements of commercial TV would need to be explored fully. Even within the print media, this budget line is very limited and care must be taken on what events and in what media advertising is done.

**Note E-20 Marketing and Communications – Special Marketing Initiatives**

For a full description of this expense area (year two through five) refer to section four of this report.

**Note E-21 Acquisitions – Purchases**

It is relatively rare for small heritage sites and community museums to have acquisition budgets. In the event that a “must have” object is offered for sale, the Curator usually maintains a list of individuals who have come forward as willing to purchase objects (with a stated limit) on behalf of the museum and then donate the object or the cash to the site. For this reason, no amount has been allocated for this line item.

**Note E-22 Acquisitions – Appraisals**

The Curator can appraise objects donated to the BCL up to a value of \$1,000 (for tax purposes). In the event that an object is offered to the BCL that exceeds that amount, appraisals can frequently be obtained at no cost to the organization through professional courtesies from established dealers who have the good of the institution in mind. A very modest figure has been provided for appraisals with this in mind.

**Note E-23 Displays – Permanent – Construction, Fabrication**

This account would permit for the annual upgrading of permanent exhibits. Although permanent in nature, it would continue to be necessary, from time to time, to make changes and repairs.

**Note E-24 Displays – Temporary – Construction, Fabrication**

With the introduction of the Interpretive Center, this budget item becomes extremely important and would assist the staff in designing, fabricating and installing one small temporary exhibit annually. Over time, a stock of standard exhibition cases and exhibit furniture would be developed that would make this task simpler and more efficient.

**Note E-25 Displays – Off-site Exhibits**

It is not anticipated that the BCL would be engaged in an active off-site exhibition program. However, from time to time opportunities may present themselves where a small exhibit would be advantageous at a location offered to the BCL. This category would permit such a program.

**Note E-26 Building Maintenance – Lighthouse – Routine Repairs and Maintenance**

Following a major capital restoration of the site, it is not anticipated that this category would need to be very large. This would change over time and as the restoration ages, maintenance costs would rise. However, this should not be a major problem for at least the first 10 to 15 years.

**Note E-27 Building Maintenance – Lighthouse – Utilities**

Costs for utilities at the Lighthouse can be kept to an absolute minimum and it is recommended that only sufficient heat be maintained inside the structure to keep it in good repair. No workstations would be located within the Lighthouse.

**Note E-28 Building Maintenance – Lighthouse – Janitorial Supplies and Maintenance**

Minimum Janitorial supplies are allocated within this budget line. The principal cost would be supplies for the care and maintenance of the interior of the structure.

**Note E-29 Building Maintenance – Lighthouse – Security Systems (Monitoring)**

A security system would be installed a part of the capital project. Monitoring of this system, for no more than two or three detectors should not reach more than \$250 per year, especially when coupled with the system provided for the Keeper's Cottage (the Lighthouse and interpretive centre would be viewed as zones within this system).

**Note E-30 Building Maintenance – Lighthouse – HVAC Service Agreements**

As noted above, it is not anticipated that this building would be equipped with complicated HVAC systems and therefore only a relatively small amount has been allocated for this cost.

**Note E-31 Building Maintenance – Lighthouse – Taxes**

As it is assumed that the City of Hamilton would become the owner of this property, there would be no property taxes levied against it nor would there be offered grants in lieu of taxes.

**Note E-32 Building Maintenance – Keeper's Cottage – Routine Repairs Maintenance**

As noted above, following a major capital restoration of the site, it is not anticipated that this category would need to be very large. However, more assets would need to be assigned to the Keeper's Cottage than to the Lighthouse as a result of the additional wear and tear on this property. As this property would also house period furnishings attention would need to be placed in the area of passive conservation and maintaining an appropriate level of environmental control for the objects housed here. Consideration should be given to the removal of some objects that may be particularly sensitive during specific climatic shifts and place these objects in the interpretive centre.

**Note E-33 Building Maintenance – Keeper's Cottage – Utilities**

As there would be no permanent workstation in this building, the utility costs would focus solely on the needs of the objects housed in the building.

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- Note E-34 Building Maintenance – Keeper’s Cottage – Janitorial Supplies and Maintenance**  
Washrooms for the public would be in the interpretive centre and supplies would not come from this line item. This line item would be for the daily upkeep and cleaning of the building.
- Note E-35 Building Maintenance – Keeper’s Cottage – Grounds Maintenance**  
To provide for the upkeep of the grounds including snow removal in winter. A grounds plan would need to be designed that compliments the structures and “binds” them together as a single site. This account would provide the expenses, with the small amount set aside under the Lighthouse accounts for this service.
- Note E-36 Building Maintenance – Keeper’s Cottage – HVAC Service Agreements**  
Although presented here as three separate line items (Tower, Cottage and Interpretive Centre) it is assumed that this service contract can be one and the same. As noted above, there should be relatively few issues for the first 10 to 15 years of operation recognizing that the systems would be new. In year one, all of these systems would be covered by warranties.
- Note E-37 Building Maintenance – Keeper’s Cottage – Taxes**  
See Note 31
- Note E-37a Insurance**  
As the city self-insures, this note has been added in the assumption that there will be the assumption of some liability for the site.
- Note E-38 Building Maintenance – Interpretive Centre – Routine Repairs Maintenance**  
As noted above, following a major capital project where all equipment is new, it is not anticipated that this category would need to be very large. However, over time the equipment would age at the same rate. This would mean that a capital replacement plan should be put into place soon after opening the facility in order to prevent a major expenditure fifteen to twenty years down the road when all HVAC systems would begin to fail simultaneously and place an unreasonable burden on the operation at that time.
- Note E-39 Building Maintenance – Interpretive Centre – Utilities**  
It is assumed that with a new building of this type, all HVAC systems would be highly energy efficient. It is a difficult area to estimate as there are a great number of variables to be considered in calculating the energy costs of modern buildings (including rapid fluctuations in energy costs, shortages in some energy sectors, changes in average temperatures, extreme weather events, etc.). Some flexibility would need to be present in these figures and experimentation in point settings and efficiencies would need to be undertaken once the building is operational.
- Note E-40 Building Maintenance – Interpretive Centre – Janitorial Supplies and Maintenance**  
This area would cover such items as washroom supplies and cleaning supplies.
- Note E-41 Building Maintenance – Interpretive Centre – Grounds Maintenance**  
To provide for the upkeep of the grounds including snow removal in winter. A grounds plan would need to be designed that compliments the three structures and “binds” them together as a single site. This account would provide the expenses, with the smaller amount set aside under the Lighthouse accounts for this service.
- Note E-42 Building Maintenance – Interpretive Centre – HVAC Service Agreements**  
Although presented here as three separate line items (Tower, Cottage and Interpretive Centre) it is assumed that this service contract can be one and the same. As noted above, there should be relatively few issues for the first 10 to 15 years of operation recognizing that the systems would be new. In year one, all of these systems would be covered by warranties.

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**Note E-43 Building Maintenance – Interpretive Centre – Taxes**  
See Note 31

Gift Shop Profit (Not inc. Staff)	Five Year Projection (Option 2)				
	1	2	3	4	5
Gift Shop Revenue	65,250	68,250	73,050	76,050	79,250
Gift Shop Expenses	41,500	42,200	45,500	48,500	52,000
<b>TOTAL Gift Shop Profit</b>	<b>23,750</b>	<b>26,050</b>	<b>27,550</b>	<b>27,550</b>	<b>27,250</b>

**Note E-44 Gift Shop – Merchandise for re-sale (50%)**  
As noted above it is recommended that a small gift shop be operated. A conservative 50% markup on all giftware is recommended. This amount is reflected in the profit margin of this operation.

**Note E-45 Gift Shop – Books for re-sale (60%)**  
A 60% markup is recommended for the resale of all reading materials.

**Note E-46 Gift Shop – Consignment Sales**  
As noted above, it is recommended that a system of consignment sales be organized. Because of the staff time required to administrate this it is recommended that 75% be added to that requested by the artist/maker.

**Note E-47 Gift Shop - Supplies**  
Custom bags (branding), cash register tapes, gift boxes, etc are covered by this account.

Gift Shop Profit over Annual Attendance	Five Year Projection (Option 2)				
	1	2	3	4	5
Gift Shop Profit	23,750	26,050	27,550	27,550	27,250
Annual Attendance	31,300	33,200	35,900	38,300	39,900
<b>TOTAL Gift Shop Profit per visitor</b>	<b>0.76</b>	<b>0.78</b>	<b>0.77</b>	<b>0.72</b>	<b>0.68</b>

**Note E-48 Administration – Office Supplies**  
Standard office supplies such as paper, pencils, pens, etc are recovered from this portion of the budget.

**Note E-49 Administration – Office Equipment Service Agreements**  
Costs of operating photocopying equipment and maintenance costs on computer systems are charged to this account.

**Note E-50 Administration – Institutional Memberships**  
Special membership fees to organizations that cater specifically to the advancement of research into lighthouses or assist in protecting the heritage of such sites are covered by this category.

## **Section 6**

### **Community Response**

#### **Interviews**

As consultants we were provided with a total of just over 20 names and completed interviews of over two thirds of these – some potential interviewees were unavailable. In all cases we have guaranteed the person being interviewed that we would not disclose specific responses that could be linked to any individual. For that reason, we have not given the names of the interviewees in this report.

#### **Preliminary summary of responses**

**1. Do you consider this heritage site of real significance to the region and/or your department?**  
Responses varied from very important to the community as well as the individual responding. It was generally felt that it was of great regional significance. It was felt that the site was not only of regional importance but also of importance to the various stakeholders involved.

**1a. Outline current ownership issues.**

It was quite an eye-opener as to the varied responses to this question, from an outright “I don’t know” to detailed understanding of ownership (two responses). The general consensus on this question is that it is confusing and complex BUT something that can, will and should be resolved. Generally responses were that this is something that the BCLG can and needs to resolve soon.

**2. Would you be willing to assist in the resolution of ownership issues?**

Generally the response to this question was: no - too busy; too closely connected to the issue; has to be solved at a higher level; too new to my existing job – etc. We have only identified two individuals who stated that they would be willing to work towards a solution.

**2a. On the issue of site ownership – what are the central issues?**

There is a general reluctance to discuss this issue and it may require mediation. Some personal issues have been allowed to creep into this discussion that must be resolved at the outset of the negotiation process. There are some positive feelings towards the fact that a resolution can be found but it is recognized by all persons interviewed to date that it will be difficult and time consuming. It is also noted that a number of individuals have indicated that they do not wish to get involved in this particular issue. It is up to the BCLG to get this resolved. There is a general lack of positive direction offered here.

**3. Has the ownership issue of this site tainted your enthusiasm for this project?**

Generally the response to this was no. Most of the respondents retain their enthusiasm and optimism on the positive outcome of this proposal. All see it as important and worth while. Given the general lack of enthusiasm for Q 2a this is a bit surprising but also creates optimism for the final outcome. One of the repeating responses is that linking this project with the now-abandoned Fisherman’s Pier project would have strengthened the eventual outcome.

**4. Suggestions for the best way forward for this project.**

Community networking is the central response to this question. That included all heritage organizations operating in the Hamilton/Burlington area, media outlets as well as natural history organizations.

**5. Does the City of Hamilton support the heritage community?**

The City is generally viewed as a supporter of heritage projects and Dundurn Castle was repeated by many as one of the key examples of a well-done project. So far, only one or two have expressed any reservations and they seem to be qualified with “it depends on who you talk to”.

# Beach Canal Lighthouse Business Plan

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**6. Who should pay for restoration of the Lighthouse (City, Province, Federal, private)?**

Most respondents have indicated that all of the above need to take out a “stake” in this project. It is also the consensus that the first step is a solid business plan that outlines possible sources of revenue. A public campaign needs to be organized that includes accessing all sources.

**7. Would you be willing to attend meetings and assist in the Fundraising?**

So far most of the respondents have begged off on this issue. Only two have come across as definitely interested, some are giving a reluctant yes – but with some broad restrictions and most are a definite NO. Conflicts of interest and too busy are cited as the main reasons for the NO.

**8. How well do the heritage groups in Hamilton and Burlington work together?**

The response was very positive. The overall impression is that the organizations in the two cities are closely connected and work well with each other. Some competition for funding was cited by several, however the overall “score” on this question was very good cooperation with some minor room for improvement.

**9. Have you been part of the BCLG consultation process in the past?**

Most of the respondents have attended meetings in the past and some have had more than a passing connection with the BCLG. However, there was an overall impression that the BCLG seems to lack a strong focus on the project.

**10. Do you have any recommendations for the BCLG?**

The responses range from – NONE - to some lengthy responses centering on issues such as networking, public relations and our favourite “the lift bridge blocks the view”.

**11 Considering the costs of Heritage Restorations – Is this site worth it?**

The response to this was overwhelmingly positive with several responses offering some suggestions including full communication with the neighbourhood to “and get the light working”.

**12. Can we set up a follow-up interview, perhaps fact to fact?**

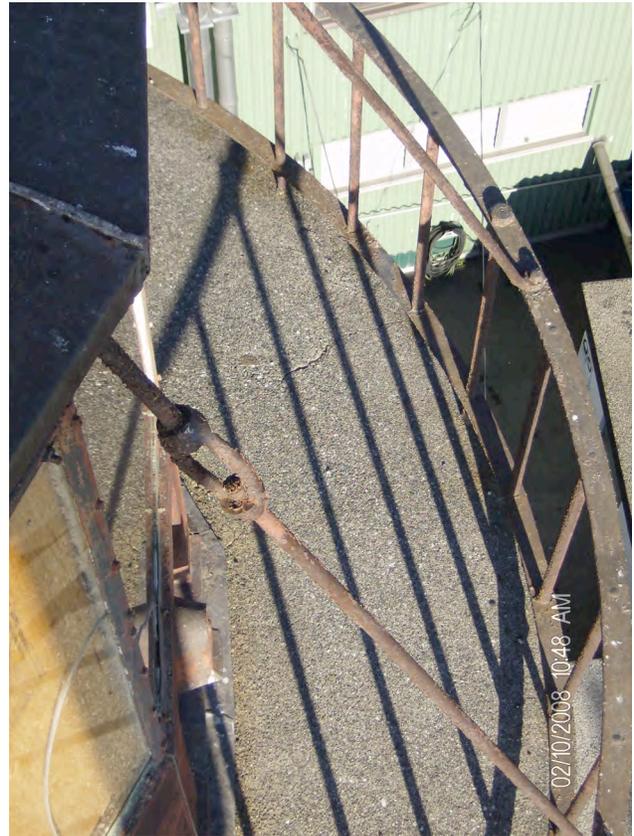
This one split evenly - 50/50 from a firm “NO-I am too busy” to an “Absolutely, would be delighted to talk some more.”

**13 Any other comments?**

Not many. One of note – Include the Lift Bridge in the project.

**14. Do you have a quote we may use in the final report?**

Evenly split 50/50. From NO to some general, and at times very vague comments.



## **Section 7**

### **Next Steps**

The key issue must be acceptance by the City of Hamilton in the role of site operator. Once established, this will enable negotiations to take place, which will ensure an appropriate custody transfer of the heritage site into hands that will see to their proper restoration. Having completed land and custody transfer, final determination of a phased development can begin which, if soon enough may attract considerable federal support in the form of cultural funding.

### **Summary of Recommendations**

In summary, one of two options is recommended and it will be up to BCLG and the City of Hamilton to determine, ultimately, which of the recommendations is the most appropriate for action keeping in mind that Option 1, if selected, should be done so on the basis that it is the first step on the path that will ultimately lead to the completion of Option 2.

### **Option 1**

Recommendations for Option 1, as detailed in the above sections, can be summarized as follows:

- *that all curatorial support services be provided outside the existing matrix of the heritage buildings complex.*
- *that a donation box be established adjacent to the front desk of the complex.*
- *that the Beach Canal Lighthouse Group consider the establishment of an Endowment Campaign for the specific purpose of supporting the Lighthouse in its operations and programmes.*
- *that an annual contribution of \$106,000 be provided by the City of Hamilton to operate this site and that that contribution be increased by approximately 1% per year (This is a pre-inflation amount).*
- *that once restoration of this site is underway and an operational scenario has been adopted, that the City of Hamilton move immediately to have the site included in the Community Museum Operating Grant program and make application to the Province of Ontario for such inclusion.*
- *that the City of Hamilton engage a Manager to supervise the day-to-day operations of the BCL and that this position be brought on stream as soon as the decision is made to move forward with the restoration of this site. This position, during the site restoration process, would be the City's principle contact point with the restoration team and on completion of the project would continue on as the site manager.*
- *that the City of Hamilton engage three part time staff members to assist in the operation and maintenance of the BCL site. These three positions should each consist of one half FTE and include a Programme Officer, Adm. Assistant and a Technician/Maintenance person. The positions should be filled a minimum of two months prior to the completion of restoration of the site.*
- *that BCL undertake only such conservation of museum objects as would normally be considered as preventative. In the event that any artefacts to be used by the BCL would need*

## Beach Canal Lighthouse Business Plan

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*full conservation, such treatment be done by outside agencies on a contract bases or by sites within the City of Hamilton's heritage network that has the capabilities to perform such work.*

- *that BCL purchase electronic data loggers (i.e. ACR-Data Logger) for environmental monitoring and that such purchases be staged over a two year period.*

### **Option 2**

Recommendations for Option 2, as detailed in the above sections, can be summarized as follows:

- *that all curatorial support services be provided within the proposed new Interpretive Center.*
- *that a donation box be established adjacent to the front desk of the complex.*
- *that the Beach Canal Lighthouse Group consider the establishment of an Endowment Campaign for the specific purpose of supporting the Lighthouse in its operations and programmes.*
- *that a gift shop be provided for in the design of the lobby area of the proposed Interpretive Center of a minimum of 400 sq. feet.*
- *that the City of Hamilton provide an annual contribution of \$167,000 to operate this site and that that contribution be increased by approximately 4% per year (This is a pre-inflation amount).*
- *that once restoration of this site is underway the City of Hamilton move immediately to have the site included in the Community Museum Operating Grant program and make application to the Province of Ontario for such inclusion.*
- *that the City of Hamilton engage a Site Supervisor for the day-to-day operations of the BCL and that this position be brought on-stream as soon as the decision is made to move forward with the restoration and construction of this site. This position, during the site restoration and the interpretive center construction process, would be the City's principle contact point with the restoration team and on completion of the project would continue on as the site manager.*
- *that the City of Hamilton engage two full time and one part time staff members to assist in the operation and maintenance of the BCL site. The positions should be filled a minimum of two months prior to e the completion of the restoration of the site and the completed construction of the Interpretive Centre.*
- *that BCL undertaken only such conservation of museum objects as would normally be considered as preventative. In the event that any artefacts to be used by the BCL would need full conservation, such treatment shall be done by outside agencies on a contract basis or by sites within the City of Hamilton's heritage network.*
- *that BCL purchase electronic data loggers (i.e. ACR-Data Logger) for environmental monitoring and that such purchases be staged over a two to thee year period.*

### **Conclusion**

#### **Approach to the Project**

It must be emphasized that all interventions and materials used in the restoration of the two existing buildings should be considered as elements of a complete system. In accordance with international policies related to the conservation of historic sites, all interventions should be reversible - as far as is practicable and technically feasible – so that the original elements of the buildings can be reconstituted if new information or methods of restoration become known in future.

Due to the importance of this site and the complexity of the conservation issues, a consulting team should be assembled with a well-established record of competence in industrial heritage conservation work of this type.

#### **Options**

This business plan has developed two options for the Beach Canal Lighthouse. Option 1 is a low-key site-specific restoration and interpretive site with a focus on the structures and features of the immediate site, while Option 2 is a more ambitious program with focus on both the immediate site and the broader cultural interests of the City of Hamilton and communities surrounding it. It will be up to the community to determine which option is best. We have added some comments touching on the issues related to moving this site ahead.

#### **Option 1**

Option 1 is the base option that should be the minimum objective for the development of the site. It ensures restoration of both structures and provides an interpretive function to illuminate this important heritage site to the immediate community and to passing visitors. However, its influence is limited and will have little incremental beneficial effects for the City of Hamilton at large beyond adding the needed interpretation of a key part of the history of the city. In other words, it is a reasonable and responsible response to this important heritage resource and should be supported if other options cannot be funded.

#### **Option 2**

Option 2 represents a much more sizeable commitment both in terms of initial capital cost and annual operating costs. However, its benefit to the community will be much higher in its ability to showcase the themes and work of many heritage groups, act as a gateway to attractions in the City of Hamilton and surroundings, and create a heritage/cultural function in an incredibly important heritage zone in Ontario. This site has been progressively both bypassed and over-passed by incremental additions and changes to the transportation networks that intersect here. While these transportation changes have virtually concealed the Lighthouse and the Keeper's Cottage from the view and consciousness of passers-by, they also represent the biggest opportunity for the site and for tourism in Hamilton due to the incredible volume of traffic passing by. If only a small proportion (approximately 0.15%) of the traffic was captured, the site should be more than viable. The pattern of roads and ramps (we have driven exits to Eastport Drive from both directions) lend themselves to easy access to tourists both coming from the U.S. and Niagara and to tourists from Toronto going to the U.S. and Niagara Falls as there is only a minor diversion rather than a major redirection in their route. To do this, appropriate signage would be key, as would information placed in tourist and travel guides. The site can, once it attracts tourists, act as a guidepost to other attractions in Hamilton – the site would therefore make other attractions in the City more viable as well. In addition, while the contribution to the operations of the larger site would be larger than for option one, the benefits would far exceed the additional costs. In other words, there would be considerably more “bang for the buck” were this option to be implemented.

# Beach Canal Lighthouse Business Plan

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## Capital and Operating Costs

We have included preliminary capital costs for each development in Section 5 and developed more detailed costs for a visitor centre in Appendix D. While the costs for each may seem daunting for a small organization, the key to success is the marketing of the idea. Capital costs, in reality, represent only a very small proportion of the long-term operational costs of any heritage site and therefore, it is vital that the “package” that is developed be both viable and a revenue generator over the long term. Communities as small as both the counties of Huron and of Bruce have seen the importance of presenting their history through their county museums and, despite populations each of approximately 60,000, have put several millions of dollars into their sites to showcase their history to visitors and to their own populations.

We have provided operating budgets for each option and based revenue streams on projected attendance levels, which are conservative given the volume of potential visitors passing near the site. With appropriate marketing activities, as we have outlined, these visitation levels should be achievable. Creative management of the site, and the provision of facilities that can be used by a wide variety of interest groups for many types of programming activities will reinforce the vitality of the resource and allow for reinterpretation of its functions and offerings into the future.

## Overall Benefits

Many heritage sites that are developed in a modest manner will fail once the originators of the site move on, pass away or lose interest. That is a key reason for this site to be operated by the City of Hamilton from the outset. It is also a reason to think on a larger scale to ensure that the site does not remain a “backwater” but becomes a vital centre of attraction for heritage-related interests and a key component of the landscape of sites throughout the City.

Indeed, the site should be viewed as the key component for the following reason – the entrance across the bar was the original entrance to Hamilton – it was Hamilton’s front door. As proposed in Option Two, by using the site to showcase other heritage interests at an interpretive centre at this location, this historic entrance to Hamilton can become the new front door to Hamilton’s heritage and attractions. This new facility can re-establish and re-define this entry point making this the orientation point for potentially hundreds of thousands of visitors into the future.



## **Section 9**

### **Closure**

The Consultants (Goldsmith Borgal & Company Ltd. Architects (GBCA) and Canadian Cultural Resource Consultants and their sub-consultants for the benefit of the client to whom it is addressed have written this report. The information and data contained herein represent the Consultants' best professional judgment in light of the knowledge and information available to the consultants at the time of preparation. Except as required by law, this report and the information and data contained herein are to be treated as confidential and may be used and relied upon only by the client, its officers and employees. The Consultants deny any liability whatsoever to other parties who may obtain access to this report for any injury, loss or damage suffered by such parties arising from their use of, or reliance upon, this report or any of its contents without the express written consent of the Consultants and the client.

The Consultants have prepared this report in accordance with the Scope of Services agreed with the Client. If you have any questions regarding the information contained herein, please contact the undersigned.

Yours sincerely  
Goldsmith Borgal & Co. Ltd. Architects

Canadian Cultural Resource Consultants

## **Appendix A**

### **PreservationWorks! Report**

The following document was commissioned in late 2004 by the Beach Canal Lighthouse Group through the Architectural Conservancy of Ontario to establish a general scope of work for upgrading the existing buildings. The results of this document have been rolled into the information assessed for the various options in the present study.

# Beach Canal Lighthouse Business Plan

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## **ARCHITECTURAL CONSERVANCY OF ONTARIO**

Suite 204 -10 Adelaide Street East, Toronto, Ontario M5C 1J3  
(416) 367-8075 / Fax (416) 367-8630 Email: aco@on.aibn.com

14 February 2005

Dave Auger  
Executive Director  
Beach Canal Lighthouse Group  
964 Lakeshore Rd.  
Burlington, ON L7S 1A2

Dear Sir:

We are pleased to present herewith an outline conservation study of the Beach Canal Lighthouse.

As requested, we have worked with the Beach Canal Lighthouse Group (BCLG) to identify the conservation challenges that the group will face as they take over ownership of this important heritage asset from the Federal Government.

We wish you all the best success in developing this important resource and appreciate your use of the ACO PreservationWorks! program.

Yours truly

Gillian Haley  
Acting Director  
PreservationWorks!

## 1. Historic Overview:

Extensive research has been done on the history of the lighthouse and Keeper's Cottage, which was made available to us by the Beach Canal Lighthouse Group (BCLG).

The first Hamilton Beach lighthouse was constructed in 1838 of wood in a manner similar to many others constructed in the 1800s to meet Britain's desire to improve navigation and enhance development in her Canadian colonies after the Napoleonic wars. Many early and mid-19th century lighthouses remain on the East Coast of Canada as well as in Georgian Bay. On completion, a lighthouse keeper was hired to maintain the light and building. The keeper worked in conjunction with the ferryman and both resided in homes near the Canal.

Although the usual problem with lighthouses on the Great Lakes was water spray freezing in the stone mortar, untypically the flaw of the first Burlington lighthouse and the pier was that they were of wood<sup>1</sup>. This proved to be a flaw as they were susceptible to the random spray of embers from the smokestacks of passing steamers. On several occasions, it was reported that the ferryman and lighthouse keeper had to rip off pieces of the pier and throw them into the Canal because they had caught fire. On 18 July 1856, the steamship Ranger was passing through the Canal when sparks strayed and caused a major fire that destroyed the lighthouse, a ferry, a house, and a local log house in the vicinity. A temporary lighthouse was built and was eventually replaced in 1858 by the current structure.

John Brown, who also constructed the six imperial lighthouses on Lake Huron and Georgian Bay in the mid 1850's, was hired to build the 1858 lighthouse. It was constructed of white dolomite limestone (over five feet thick at chest height) and about 55 feet high. It is almost identical to the lighthouse built by Brown on Christian Island in Georgian Bay, and similar to the recently restored Chantry Island light in Southampton or the Point Clark light north of Goderich.

On completion of the stonework, an interior staircase was installed which was typical of 1850's lights (earlier lighthouses, such as the one constructed c. 1845 at Presqu'île and the 1818 Thames River light at Lighthouse Cove, near Windsor, had similar stairs). Then the lantern room was added with the light at the top. This lighthouse was one of the first to use coal oil, rather than the traditional whale oil<sup>2</sup>. This began a new trend in preferred energy sources, which angered many whalers, since it threatened their livelihood – although since Kerosene was invented in Nova Scotia a few years earlier, it still had the net effect of supporting Canadian producers. The lighthouse was maintained without major repairs until 1958, which is a time frame not dissimilar to that of the Bonavista light in Newfoundland, which was in continuous operation from c1845 to 1962.

In 1958, a powerful storm swept through the region and the lighthouse that was thought to be invulnerable sustained water damage with water penetrating the lighthouse and damaging its structure and lantern. A few months after the storm, timber planks were bedded in concrete to make the foundation of the lighthouse stronger so that it could withstand the exterior elements.

In 1961, the lighthouse was replaced with a more modern beacon located at the end of the south Canal pier. The new lighthouse is powered by electricity and the beam of light can be seen approximately 15 miles from the Canal. The old stone lighthouse officially ceased operations in 1968, marking the end of manned lighthouses at the Burlington Canal.

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<sup>1</sup> Ironically, the Presqu'île Light, constructed of stone c1845, was subject to freezing such that a massive crack formed on the south (lake) side of the stone tower within a few years of construction. To prevent collapse, the tower was banded with tripled planks of 2x6 framing staggered up the exterior (to allow ventilation of the stone) and then covered with wood shingles – a stone tower that became a wooden one, which is how it is to the present day.

<sup>2</sup> The hatch at the ground floor gave access to the oil storage cellar, which still smells of coal oil. Of interest is that, for safety reasons, lighthouses in the U.S. typically had a separate building for storage of the oil while the British American sites used the space under the entrance in the main tower.

The stone lighthouse was not torn down because the cost was too high. The lighthouses on the Burlington Canal have been a symbol of Hamilton Harbour's growth and development. Since the Canal was first opened to vessels over one hundred years ago, it has helped to develop the areas of Burlington, Dundas and Hamilton and it remains a significant symbol of our history of industrialization and development.

## 2. The Conservationists

The Beach Canal Lighthouse Group is a group of local folks determined to acquire, restore and preserve the 1858 Lighthouse (and the 1857 Keeper's Cottage) beside the lift bridge at the Burlington Bay Canal. The group is raising funds and building local partnerships to restore the limestone tower and brick house in time for their 150<sup>th</sup> Anniversary in 2008. Both buildings are in remarkable condition for their age.

Pete Coletti, the last keeper of The Burlington Light, has been elected an honorary member of The Lighthouse Group. Pete held the position of keeper for 25 years and is now retired down east.

## 3. Survey Methods:

Two site visits were made to the site by the Consultants:

- In the first visit, only the lower portion of the tower was accessed via the internal stair. Many treads are missing on the stair and it is generally in an unsafe conditions. The top hatch in the floor of the lantern level is locked closed from the interior.
- The City of Hamilton provided a snorkel lift, which allowed access to the platform at the lantern level from the exterior. The lantern was not entered due to fungal hazards posed by pigeon excrement contamination.

## 4. Condition Report:

### 4.1 Foundations:

*The foundations appear to be performing very well on both buildings. No significant cracking or settlement was noted.*

### 4.2 Superstructure:

#### Lighthouse:

The masonry tower shaft is stable and is not showing any serious deformations and cracking. A number of masonry joints are open, particularly on the east side facing Lake Ontario. The joints have opened due to weathering, causing freeze/thaw action in the joints, which eventually leads to their deterioration and failure. Thus the observation of greatest deterioration occurring toward Lake Ontario makes sense, as this is where precipitation borne on the east wind off the lake occurs.

Deteriorated or inadequate mortar joints must be replaced by a qualified heritage mason in accordance with good conservation practices. All loose joints made with inappropriate materials must be rebuilt. The deterioration of masonry will continue unabated in this environment. The pace of deterioration will accelerate exponentially from this point on and restoration work should proceed without delay.

The interior surface of the masonry is in much better condition, reflecting its protected location.

# Beach Canal Lighthouse Business Plan

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The wood stairs are unsafe and must be rebuilt and should be done so to conform with the original details, including the beaded stringers, which are very typical of 19th century sites.

There are broken windows in the lantern, which must be replaced. Originally, these windows would have been of plate glass, which is heavy and expensive. A suitable alternative would be the use of laminated glass which can withstand weather and vandals and which does not look substantially different from the original.

An environmental clean up of the pigeon guano must be done by a licensed hazardous waste contractor. After that is done, it is very important that the buildings be secured to prevent re-contamination. In addition, original coatings of lead-based paint should be removed, particularly from the lantern, and replaced with rust-stabilizing coatings (based on Tannic acid or other similar compounds).

The structure of the lantern appears to be stable and sound. This can only be confirmed after the environmental clean up is completed. The usual clean up and painting tasks will be required. Access is difficult and this will be the largest cost item related to the lantern. It must be noted that while the lantern is unusually complete when compared with other lighthouses in Eastern Canada, the handrail at the lantern level is not secure. Some repair to metalwork and to the supporting deck must be done to make this level safe.

Access for masonry repairs must be coordinated with the repairs to the lantern to minimize access costs. We assume that the shaft will have scaffolding erected in order to get good access for masonry repairs.

## Light Keeper's Cottage.

This building was originally a 2 story 2 unit residential structure. The structure itself is sound and no major structural repairs are required.

Minor structural repairs are required in the basement where a post is not adequately supported and some beams may need reinforcing due to inappropriate modifications that have weakened them.

The Wooden shed at the back has settled, perhaps due to rot in the supporting timbers. The presence of split lath, the appearance of a similar (though differently clad) rear addition in early photographs, and the general arrangement suggest that this was a frame summer kitchen for the building. A frame addition would reduce the amount of heat generated by cooking activities in the main house during the summer. This addition is therefore an important part of the main house.

Masonry restoration is required. There are several areas of loose bricks, near the foundations, and at the top of the gable walls.

The original coping on the top of the gable walls has been removed and not replaced. This allows water to enter the middle of the brick wall. Of note are the small chimneys at the roof, which sit on "shoulders" formed by the truncated remains of the original chimneys. There is sufficient photographic and in situ information to permit a complete restoration of these elements.

We were not able to check the condition of wood members framing into foundation walls or upper exterior walls. This should be done at every opportunity where exterior walls are opened.

There are signs of water infiltration into the building at the gable ends of the second floor ceiling as evidenced by failing plaster. This may be due to the lack of copings on the gable walls.

## 5. Architectural Assessment:

The composition of the lighthouse together with the Keeper's Cottage is remarkable for its completeness and its proximity to a major urban area. Both the house and the lighthouse, while modified since original construction, sufficiently complete in their details, or remnants of details, that a good quality restoration can be undertaken.

### Lighthouse

The details of the lighthouse include the masonry generally, the entrance door, the interior wood landings, floors and stair (which requires considerable repair and restoration), and the cupola/lantern. The latter is very complete and includes the vent from the last fitted light source (presumably carbon arc).

It is noted that the lantern house does not conform to images published as late as the 1870's and it is suggested that the existing may be a replacement. Early lantern houses of European manufacture typically had rounded tops. Further research is recommended.

### Keeper's Cottage

The exterior masonry of the Keeper's Cottage is multiple-wythe masonry in excellent condition, and of a high order (Flemish Bond on the front wall with English-bond on the sides and rear). Although some changes were done to the windows, notably on the south elevation, these are easily discernable due to the manner in which the brick is cut and detailed (notably at the voussoirs) and these interventions can be reversed if deemed to be in the best interests of a restoration.

Interior trim is sufficiently intact and original to be able to deduce earlier arrangements of doors and changes. This is particularly the case around the trim at the door at the bottom of the main stair where at least one significant change occurred as is evidenced by cut and modified trim.

The fireplace is original as is the base course of pressed brick, which would have backed up the original hearth.

Of interest, too, is the rear shed, which is of frame construction with wood siding to the exterior and lath and plaster at the interior. The lath is hand-split, dating to no later than the mid-1800's, which suggests strongly that this addition is original to the house and most likely served as a summer kitchen. Early photos do show a wood addition, albeit with a different arrangement of siding. Therefore, some siding removal is recommended with a view to researching the original cladding arrangement and verifying the originality of this wing.

A prime feature of the original house would have been the chimneys which are currently too small in relation to the original. However, the bases of the original chimneys are clearly visible on the peak of each gable forming a "shoulder" under the current units. Using this evidence and early photographs, an entirely appropriate restoration is possible.

## 6. Budgets and Schedule:

Budgeting for the recommended conservation work is beyond the scope of this assignment. We recommend that you contact Ms. Laurie Wells at Summit Restoration, Burlington (Tel. (905) 332-5169)

Environmental clean up work should be done under the supervision of an environmental consultant. We recommend Mr. Robert Lovegrove of Simcoe (Tel (519) 426-7019).

# Beach Canal Lighthouse Business Plan

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We recommend that work be started on a phased and prioritized basis starting this season.

## 7. Summary and Conclusions

The two main structures at this site are in very good condition considering their lack of maintenance in recent years.

Restoration to a reasonable level to secure the future of the structures is entirely feasible and reasonable.

The restoration should proceed without delay. Repairs should be prioritized and specified by an experienced heritage conservation consultant team.

This site is of great importance for the community and is somewhat unique in being a complete lighthouse complex from the mid-19<sup>th</sup> century in such close proximity to a major urban area. Examples of recent citizen-led restorations abound in North America and each effort typically attracts great attention and enthusiasm from their local communities. Recent examples in Ontario include the Chantry Island lighthouse off Southampton.

We trust this brief report is of use in the continuation of this important work. We eagerly look forward to seeing the results.

Eric P. Jokinen, P. Eng.  
Principal  
Jokinen Engineering Services

Christopher Borgal OAA MRAIC CAPHC  
Principal  
Goldsmith Borgal & Co. Ltd. Architects

February 2005



## Appendix A

Site Photos - November 2004 Site Survey



Detail of cut stone walk around lantern



Lantern. Dating of the lantern should be done to determine if this is the original or a change dating to the early 20<sup>th</sup> century.

## Beach Canal Lighthouse Business Plan

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Detail of catwalk



Image of last beacon mounted inside the lantern. This beacon is electric and is a mid-20<sup>th</sup> century replacement for the earlier lights

## Beach Canal Lighthouse Business Plan

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Detail of the underside of the roof of the lantern. The details suggest an early 20<sup>th</sup> century design, which would have replaced an earlier 1850's assembly. Further research should be done.



Detail of temporary repairs.

## Beach Canal Lighthouse Business Plan

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Detail of floor of lantern. Note the depth of guano on the floor. This material contains fungus and can be toxic to humans.



Detail of top of lantern showing ventilator with wind vane, which keeps the vent pointing downwind.



Detail of stone inside tower



Detail of exterior of barrel of tower

# Beach Canal Lighthouse Business Plan

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Tower as seen from the south



# Beach Canal Lighthouse Business Plan

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Keeper's Cottage from the south



Gable wall – note the absence of a cap on the parapet and the small masonry chimney



Detail of north gable. Note the shoulder under the chimney, which is the base of the original chimney.

# Beach Canal Lighthouse Business Plan

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## **Appendix B**

### **Opinion of Cost**

The following document was commissioned by the Beach Canal Lighthouse Group in the fall of 2007 to establish a general cost for upgrading of the existing buildings. The results of this document have been rolled into the values generated for the various options in the present study.



8 January 2008

Mr. Anthony Butler  
Chair, Beach Canal Lighthouse Group  
198 Dromore Crescent  
Hamilton, ON L8S 4B4

**Re: Burlington Canal Light Station and Keeper's Cottage  
Opinion of costs for restoration**

Dear Sir,

As requested by you, we have prepared the following brief opinion of cost with respect to the preservation of the Burlington Beach Lighthouse and its associated Keeper's Cottage.

## **Location and General Description<sup>1</sup>**

The lighthouse is located between the Skyway Bridge and the lift bridge on Burlington Beach and was constructed approximately 150 years ago of local limestone.

Since 1832, the Burlington Bay canal has allowed ships unlimited access to Hamilton's harbor from Lake Ontario. Originally, two small range lights were installed at the canal's entrance but vessels found it difficult to maneuver this stretch at night. Responding to demands of mariners and local residents, a 54-foot octagonal wooden lighthouse was constructed in 1837 on a stone foundation and was financed by shipping tolls.

On July 18, 1856, sparks from a steamer ignited the wooden pier and, because of high winds, the fire destroying the lighthouse, the ferry house, and the Keeper's Cottage. The light keeper spent several months living in a shanty until a new brick Keeper's Cottage (one of the two buildings which are the subject of this report) was completed 23 December 1857. The new main lighthouse was completed on October 18, 1858, by John Brown, a prominent lighthouse contractor. The 55-foot cylindrical tower was constructed of limestone, with walls five feet thick at the base.

This new lighthouse was the first in Canada to switch to the use of coal oil instead of whale oil. By the 1860s most Canadian lighthouses were fueled with coal oil.

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<sup>1</sup> Excerpted from Lighthouse Forum

The original price of the stone light tower was \$10,479.98.

The Burlington Bay Main Lighthouse was deactivated in 1961 and currently sits with the abandoned light keeper's red brick cottage.

## **Summary of Work**

Preliminary inspections of the work culminated, just prior to completion of this current report, in a crane inspection of the masonry to verify condition on 13 November 2007. The scope of work proposed for the two sites is set out below in a preliminary manner and has been used to prepare a preliminary budget for the work. It is anticipated that some, or much, of the work at this site will be done by volunteer labour (albeit, the volunteers will be instructed on the appropriate methodology for restoration research and repair of heritage materials).

The scope is set out as follows:

### **Lighthouse**

- Preliminary Documentation
  - Documentation should be prepared by, first, preparation of a set of measured drawings of the building, both exterior and interior. One suggestion would be to have students perform the work under instruction from the restoration consultant. Ideally, the exterior should be drawn in such a manner that every exterior stone is illustrated; all levels at the interior are illustrated (by means of horizontal sections), and plans of each level are prepared (including the oil room).
- Testing and inspection
  - Drill a test hole at the foundations (from the oil room floor) to ensure that any piles are immersed in water. Piles do not rot when submerged, and such piles are reportedly used to support the stone base of the tower. Low water levels in Lake Ontario could have a detrimental effect on the state of the tower.
  - An assessment of the extent of voiding in the exterior walls would be useful. This can be done on completion of the full backpointing and face pointing work if, during the work, extensive voiding is found. Various methods can be used such as radar and impact testing. No allowance is included at this stage however.
  - Sample painted finishes for colours. On instruction, volunteers can perform this task.
- Support and field equipment
  - Scaffolding for the lighthouse will be required for the exterior work.

## Beach Canal Lighthouse Business Plan

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- Support facilities are generally required for a project of this type. In this case, the empty Keeper's Cottage would be a good location for a site office. Other facilities such as storage trailers, toilets, etc. may be required for workers.
- Exterior work
  - Repoint the exterior of the lighthouse. For the purpose of the present estimate, 100% pointing is assumed although small areas of original mortar should be left in place.
  - In addition to face pointing of the exterior, approximately 50% of the exterior joints will require deep "back" pointing due to voids which have developed in the walls as a result of the leaching out of lime from the water. This is particularly noticeable on the north-east quadrant of the exterior, which faces wind-driven rain and snow during the worst storms off Lake Ontario.
  - Re-paint and restore the exterior of the lantern house. The joints of this structure are caulked with what appears to be lead-based caulking and the original paint remaining on the structure will require careful stripping as this, too, most likely contains lead. The caulking should be replaced with a modern material such as a poly-sulphide or isocyanurate caulking (of marine grade standard) and the metal parts sandblasted, primed with rust-inhibiting primers and then enamel or epoxy top coats.
  - Limewash should be applied to the exterior of the tower. Remnants of this can still be seen in some locations such as the SW quadrant of the tower, which is the least exposed to severe weather.
  - Repair and replace broken windows and frames in tower as necessary.
  - Replace broken windows in the lantern. The original windows are polished plate. These can be replaced with modern laminated glass of equivalent thickness, which will look the same as the original but be resistant to impact damage.
  - Entrance door and transom should be repaired.
  - Vestibule should be included (optional) based on archaeological testing and evidence on surface of wall and from historical photographs.
- Interior
  - Repoint the interior of the lighthouse. This work could be done by trained volunteers, although appropriate safety measures would have to be taken in the mixing of heritage lime for the work. This work could be done once the interior stair is reconstructed and repaired.
  - Restore the interior stair and rail. The lower sections of the curved stair have been removed due to deterioration. However, much of the stair is

present and in good condition. Repairs using trained volunteers are entirely feasible.

- Restore and repaint the interior of the lantern house. As with the exterior, careful removal of lead-based paint is essential in this work.
- Block the vent (with screening made of cage wire) to the lantern house to prevent pigeons entering. It is important that the vent remain active to permit movement of air inside the tower and thus prevent condensation.
- Reinstall original fixed light (rescued during guano removal), which is currently stored off site at Joseph Brant. Restoration of the mechanism will be a much bigger task and should be considered for a later date.
- Paint and limewash the interior based on paint sampling.
- Floor at entrance floor should be repaired using select pine or old-growth material to match dimensions of existing. As much as possible of the original floor should be re-used if feasible as well as original framing members.

### ***Keeper's Cottage***

- Preliminary Work, Testing and inspection
  - The first step for the interior of this building would be to prepare a set of as-found drawings together with a set of photographs of all surfaces and finishes keyed to the as-found documentation. This work could be done by students under suitable instruction of the conservation specialist.
  - Careful dismantling of finishes, such as wall boarding or flooring or suspended ceilings should then be done with instructed volunteers. Each layer should be removed and subsequent finishes recorded as they become visible. By this process, the original layout and finishes of the house will be revealed and should be set up on the as-found set of documents.
  - Sample painted finishes for colours. On instruction, volunteers can perform this task. Both interior and exterior painted finishes should be examined.
  - A set of restoration plans should then be prepared for permit purposes. This will require the services of a licensed professional but the base documents already prepared will be used to complete this stage of the documents. An associated part of the documents would be the preparation of specifications for the work. Tendering of work and site review may also form duties at this stage.
- Support and field equipment
  - A limited amount of scaffolding for the dwelling will be required for the exterior work.
  - Support facilities are generally required for a project of this type. In this case, the empty Keeper's Cottage would be a good location for a site

## Beach Canal Lighthouse Business Plan

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office until such time as the space so used is due for restoration. Other facilities such as storage trailers, toilets, etc. may be required for workers.

- Exterior
  - Replace shingles with new slate and roof flashings to match historical records and to ensure that water does not enter the structure.
  - Re-point exterior. In general, the exterior is in good condition save for some structural cracking at corners. Pointing could be done at the same time as the lighthouse for the sake of efficiency. During this work, repair or replace damaged bricks in chimneys.
  - Repair all windows, re-paint and putty and replace broken glass using suitable heritage glass.
  - Repair and restore the rear (wood) wing and front porch and paint and finish as required.
  - Install limited landscaping to suit design requirements including a site fence if deemed to be required.
- Interior
  - Install new insulation
  - Repair plaster finishes and paint over existing layers with colour determined as base layer colour from paint sampling procedure.
  - Strip and re-finish all woodwork, including door and window trim, bases, stair rails, etc. An alternative would be to leave all finishes in place but simply re-paint in heritage colours as determined by paint testing.
  - Repair and/or replace damaged interior doors and hardware. Restore to original appearance,
  - Replace damaged or missing trim (such as mantle) and hearthstones.
  - Install new electrical system
  - Install new heating system

## **Procedure**

Opinions of cost for the proposed work have been developed by a variety of means. These include:

- Consultation with our Cost Consultant
- Reference to the areas requiring work and application of standard industry rates
- Consultation with reputable contractors to provide information
- Reference to other experience related to conservation work

## **Qualification**

The opinions of cost provided are based on visible information and current conditions at the time of our inspections. The amounts are presented in constant current dollars for full work.

The opinions of cost will be subject to prevailing market conditions, escalations or reductions in material and labour costs over which we, and our sources, have no control. The amounts could have a range of +/- 20% depending on market conditions at the time of the work.

Contingencies must be included in the pricing to cover unseen or unknown issues that may only be visible after initiation of the work.

## **Variables**

While the costs presented are opinions related to the potential cost of contracted work, it is probable that some reductions can be made in the totals by virtue of the donation of materials or labour. In such instances the value of the labour and donated materials should be accounted for and offset against the budget figures.

It is important that this be done so that fundraising and applications for grants fully represent the value of the work.

## **Opinion of Cost**

The opinions of cost are presented on the following pages.

## Beach Canal Lighthouse Business Plan

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### Opinion of Cost - Lighthouse

Item	Budget
1. Preliminary documents –As much of the information may be developed under a voluntary basis, a small amount is carried here for expenses only.	1,000
2. Investigation and testing may include mortar tests, tests for hazardous materials, and coring to determine the depth of ground water and condition of the pilings supporting the foundation.	7,500
3. Support facilities –to be installed in the lightkeepers cottage. Some preliminary upgrading would be required and a budget allowance is included. If done in sequence, some of the upgrade work could be included as a part of the upgrade and restoration work in the cottage.	10,000
4. Scaffolding – for restoration work of this type, a full scaffolding system is recommended as this work is done in a sequence including initial marking of areas to be repaired, cutting out, backpointing and pointing. Once pointed, the masonry must be allowed to cure (or carbonate) for a period of a month and the scaffolding is used during this period to support tarps to keep the mortar damp by providing shade.	175,000
5. 100% repointing and 50% deep backpointing & application of limewash.	210,000
6. Lantern repairing & repairs which will include new caulking, glazing, and painting both inside and outside. The budget provided is for contracted work which may, to a great extent, be completed by instructed volunteers.	40,000
7. Window repairs and stairway repairs – as much as possible, the remaining existing stairs should be used with rotted or damaged area replaced with similar material. Vestibule installation.	20,000
Base cost	463,500
Contingency –a contingency of approximately 15% is usually recommended to deal with issues, which may not be reasonably anticipated at the design stage. This may be adjusted as the work progresses.	70,000
Construction budget – this amount may be lowered by volunteer labour or donations of materials but a total figure should be used as an indicator of the total value of the project as it may be useful in obtaining grants and donations from various sources	533,500
Engineering and consulting – we have carried a rate for this work of 10% which is lower than recommended fees. However, the involvement of skilled professionals with the project is an asset for the project, some of these costs may be lowered with donations of time. A full estimate of cost, as noted above, is useful in terms of donations and grants.	53,000

## Beach Canal Lighthouse Business Plan

<b>Total budget</b>	<b>586,500</b>
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### Opinion of Cost – Keeper’s Cottage

Item	Budget
1. Preliminary documents –As much of the information may be developed under a voluntary basis, a small amount is carried here for expenses only. Restoration plans would be prepared under the consulting budget (below).	1,000
2. Dismantling – sequential dismantling will reveal the original layout and finishes. This must be carefully done and all information keyed to the drawings. Testing (below) for hazardous materials should be done first.	20,000
3. Investigation and testing may include mortar tests, and tests for hazardous materials such as lead paint.	2,500
4. Support facilities –to be installed in the lightkeepers cottage. Since the amount is already carried under the lighthouse budget only minor renovations would be required to complete the area.	2,000
5. Scaffolding – only a limited amount of scaffolding should be required for this project, which can be relocated as the work progresses.	25,000
6. Shingles and flashing – the roof appears to be in fair to good condition. Installation of shingles to the rear shed and repairs to the main roof are recommended at present.	15,000
7. Pointing and masonry repairs – the exterior walls are in good condition save for some noted cracking and areas, particularly at the foundation, which may require repairs.	20,000
8. Window repairs would include the fabrication of new exterior storm windows and rehabilitation of the original windows. Testing and assessment of original paint layers should be done with all painted elements prior to refinishing to establish and record the original colour schemes.	10,000
7. Rear - wing repairs would include a full restoration of the wing to its original appearance	20,000
8. Landscaping – a modest budget is provided for minor improvements to paths and planting areas. No allowance is made for a site fence, as its size is not known.	1,500
9. Insulation – a modest amount of insulation and upgrading can be installed depending on decisions related to how the site is to be operated. More extensive insulation would reduce the authenticity of the restoration but may provide more usability and vice versa.	3,500
10. Interior plaster repairs and painting – once an assessment of original colours is completed, repairs and painting can be performed to the interior	20,000

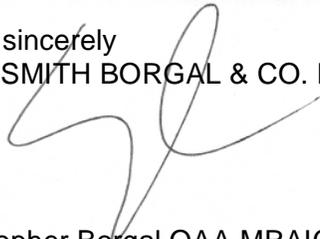
## Beach Canal Lighthouse Business Plan

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finishes. The degree of restoration should govern the policy – either repair the plaster using original materials, or cover the plaster with ¼” drywall and paint. Options should be carefully assessed at the planning stage.	
11. Interior woodwork repairs and painting.	2,500
12. Interior doors and hardware	2,500
13. Interior trim restoration	5,000
14. New electrical system	10,000
15. New heating system – minimum damage to the fabric of the building is advisable so this selection must be made with a view to providing climate control with delivery of heating and/or cooling in as discrete manner as possible.	10,000
<b>Base cost</b>	<b>170,500</b>
Contingency – for work of this type a contingency of approximately 15% is usually recommended to deal with issues, which may not be reasonably anticipated at the design stage. This may be adjusted as the work progresses.	25,500
Construction budget – this amount may be lowered by volunteer labour or donations of materials but a total figure should be used as an indicator of the total value of the project as it may be useful in obtaining grants and donations from various sources	196,000
Engineering and consulting – we have carried a rate for this work of 10% which is lower than recommended fees. However, the involvement of skilled professionals with the project is an asset for the project, some of these costs may be lowered with donations of time. A full estimate of cost, as noted above, is useful in terms of donations and grants.	20,000
<b>Total budget</b>	<b>216,000</b>

We trust this is the information you require at this time. Please do not hesitate to contact the undersigned for more information.

Yours sincerely  
**GOLDSMITH BORGAL & CO. LTD. ARCHITECTS**

  
**Christopher Borgal OAA MRAIC CAHP**  
 Principal

# Beach Canal Lighthouse Business Plan

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### **George Thomson Diaries**

In their own right, heritage buildings are witness to the past and tell voluminous stories to us in the present. However, in some instances, these structures are rendered far more valuable by the presence of additional materials, which directly connect us to the people who were involved in their construction or use. Remnants of the plans for the Oxford Museum (old Woodstock Town Hall), the St. Catherine's Town Hall, maps of original settlement patterns, letters and diaries are examples of these types of associative artefacts which add immeasurably to the depth of the story for the sites with which they are associated. Such materials are ephemeral because of their inherent delicacy and are usually lost. But when still present, they are treasures in their own right and vastly enhance the value of the structures with which they are connected.

In the case of the Beach Canal Lighthouse, the diaries of George Thomson are still extant and these document not only the day-to-day life at the site but the actual construction of the lighthouse. These materials have been transcribed onto a spreadsheet. We felt that presentation of this document in the business plan reinforces the importance of this historic site and have included a reprint of the text on the following pages as provided to us by BCLG.

In the format of the attachment, the total length of the diaries runs to over 250 pages which is, of course, too long to be practical for this present report. We have therefore included only the first few pages to demonstrate their content with the recommendation that the interested reader may wish to contact BCLG for a copy of the full text. While the content is very heavy on the weather of the time, later entries discuss the construction including the dates of arrival of materials and the techniques used.

## Beach Canal Lighthouse Business Plan

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Year	Month	Day	Entry
1854	January	1	Calm moderate morning, noon much the same.
		2	Cold blustery day all through
		3	Milder with dull cloudy weather up at Hamilton. Got squared[?] at Custom house both for ferry age and lighthouse. Bought India rubber shoes, bread and groceries.
		4	Quite Mild wind south, noon weather the same. Paid and Grisoly[?] for 2 months ending this day.
		5	Cold with a slight following of snow, noon drop of rain wind east.
		6	Cold but fine for winter weather, noon wind variable from west to north.
		7	Cold and blustery[?], noon weather the same. Water still fal [ ]
		8	Cloudy dull morning, noon cleared a little
		9	Cold and breezy from the west, Took William up to Hamilton very cold and windy.
		10	Much milder with little wind came down from Hamilton. Hosted better to Elizabeth
		11	Moderate morning, noon got the punt hauled out unite foggy wind easterly
		12	Mild morning with rain and fog noon heavy showers of rain no wind making new lunch[?] for every gale from the west[?]
		13	Cold but pleasant morning, noon a little snow. Wind went.
		14	Cold and blustery, noon moderate at the square.
		15	Moderate but cloudy weather no wind noon Bill came down with A. Davis. Wind and sun broke out in the evening.
		16	Quite mild with rain wind west Mr. [?] called. Evening cloudy
		17	Cold but fine morning. Noon turned out quite a fine day.
		18	Moderately cold and breezy from the east. Noon steamer Maressa[?] into Canal, railroad snow brought down, wind strong from [?]
		19	Milder but still cloudy dull weather, noon much the same up in Hamilton got boots and skates.
		20	Mild foggy morning thunder and lightning with heavy rain came down [?]
		21	A heavy gale from the west, noon the same little ferrying[?]
		22	Very cold with strong wind from west, very few clouds. Large scow almost sunk the effect of storms and ice, noon weather large scow. Evening calm but very cold
		23	[?] Very cold morning wind strong from the west, large scow sunk ferries with small scow, noon bitter cold, both oil and water froze inside for these past two nights.
		24	Very cold and windy, Noon a little milder, Hill the carpenter called. Evening clear and cold. Water about a stand.
		25	Very cold with a light breeze from North, at the square Capt. Butterworth informs me Steamship Bengal left Toronto for Rochester on the 19th. Commenced to light up both lighthouses.
		26	Quite mild wind from the South West. Gave Mrs. Wells 3 pounds on G. Grimley's account. Steamship Royal arrived at a quarter to 3 o clock.
		27	Dull coolish mornings, Royal left about 9 o clock up at Hamilton, Bill and A. Davis came down. [?]
		28	Cold morning but almost calm. Noon still very cold. Wind light from east
		29	Very cold and clear noon a little milder. Received latter from Mr. Pring . Lighted up to night[?]
		30	Plather cold, wind light from the South, [?] Marketing all the oak planking. Noon mild and calm. Sent a note to Mr. Davidson. Wind South West
		31	Moderate but cloudy morning, Noon mild with rain, wind south west. Steamship Royal arrived 7 pm on the locomotive called the Reindeer No.27

## Beach Canal Lighthouse Business Plan

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- February
- 1 Mild pleasant morning. No wind, Noon breezy from the South West. Steamship Royal sailed about 11 o'clock. Received three barrels of coke from Hamilton. A fine day all through.
  - 2 Cold blustery snowy morning, Noon much the same
  - 3 A severe cold morning, no wind canal clogged up with ice noon milder. Taking meds.
  - 4 Still very cold but quite calm. Canal froze over. Up in Hamilton bought coat, cost 2 15 Handkerchief 7.10. Took William's boots up.
  - 5 Still very cold. [?] Noon snowing. Taking medication
  - 6 Very cold morning wind west, noon sunny clear and cold. Gave G. Grimly 5 for a piece of rope
  - 7 Cold calm morning canal froze over, Noon breezing up from the east, floating ice in large quantity. Loaded teams crossing the ice. Taking Meds. Bread up to 9 pence currency for 4 pound loaf.
  - 8 Dull heavy cloudy morning. Canal choked with ice, a great quantity of floating ice in large lake. Noon weather much the same, evening canal clear.
  - 9 Weather cold with a stiff breeze from west. Noon flights of snow, wind stronger with clouds.
  - 10 Cold clear morning. P Royal in the with one [?]. Left about 11 o'clock. Noon weather about the same wind west.
  - 11 Beautiful clear cold morning no wind. Noon at the square Lake Ontario froze out as far as the eye can reach. Posted letter to Brown. Water at a stand.
  - 12 Cloudy cold morning wind east with a heavy sea does not trouble us owing to the ice outside, Mr. Gunn called [?] the lights to be lit, rain between 10oc 11 pm weather moderate but very cloudy.
  - 13 Rain with fog and clouds, no wind canal full of ice, Noon cleared a little [?] turned quite foggy. Locomotion called the brant.
  - 14 Snow mixed with rain wind NNC disagreeable weather. Noon blowing strong from the North East, Royal lying in Canal 3 o'clock PM quite a gale from the east with fiercing hail. [?] tried to get into Canal but could not.[?]
  - 15 Moderate Morning wind W.S.W cloudy, west up to Hamilton got [?] bought sheep. Royal gone to Poroute to wood
  - 16 Cold buy little wind, noon cold and Breezy 4pm sun broke out.
  - 17 Very cold and clear. Little to no wind. Moon clear and sunny all day. Rather cold, wind west. Evening beautifully clear.
  - 18 Moderate wind about W.W with thin clouds at the Square. Noon quite mild. Water still about a stand.
  - 19 Cold clear morning, noon quite fine with a light breeze. P Royal is about [?] with one locomotive [?] called [?] to light up on the second night of the Steamers sailing to the time she arrives, several crows seen flying to the north, a remarkable fine day
  - 20 Blowing strong from North East with few clouds, Noon quite a gale from the east. P. Royal lying in canal. Ice banks made.
  - 21 Rather dull and cloudy. Little to no wind, noon quite fine. P. Royal left about 1 pm. Locomotives name Wentworth [?]
  - 22 Wind and rain from the PW disagreeable morning. Noon raining blowing and snowing but mild with all, evening heavy squall with snow from the west.
  - 23 Very cold wind light from west, few clouds. Noon clear and sunny. Trimmed the willow trees, evening moderate. Water fallen 2 9 \_ inches the lowest water measured.
  - 24 Cloudy dull morning little wind. G. Grimley[?] Noon moderate, Evening wind strong from northeast. [?]

## Beach Canal Lighthouse Business Plan

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- 25 Cold with storm from the east, noon still cold and windy with a heavy sea in the canal, Broke the key by trying to get in the lower lighthouse. Found the lock and door froze.
  - 26 Much ice in canal could not ferry, wind still cast with rain. Hail and snow weather very bad. Noon the same, the heaviest storm we have had this season.
  - 27 Clear and cold a large quantity of snow fallen for the last two days, wind light from the north, noon turned out quite fine a beautiful evening.
  - 28 Very cold, no wind, canal full of ice, noon quite mild in wind. P. Royal got in about 4 PM with one locomotive.
- March
- 1 Mild cloudy morning, up at Hamilton P. Royal left about 9. Mailed letter and paper to Elizabeth got lock for lower lighthouse.
  - 2 Dull [?] morning, came down from Hamilton, sent clothes to [?] Noon spitting of rain, wind NE
  - 3 Breezy morning, noon quite a gale from the PW. Throwing [?]. Evening moderate.
  - 4 Fine light weather, wind about WPW. Crows flying to the north. Noon turned out a most beautiful day. Got the new lock in. The lower lighthouse Lent Mrs. Well's [?]. P. Royal arrived two locomotives called the L. Simcoe.
  - 5 Rather cold with heavy clouds and a sprinkling of snow. Locomotives landed, Noon rather cold with the wind at west. P. Royal sailed around 1 pm.
  - 6 Cold and clear with a light breeze, Called upon [?] got home 4 pm, quite a fine day. Sent P. Royal up to Hamilton. Did not fire up in lighthouses tonight.
  - 7 Cold and clear with a light breeze, Called upon [?] got home 4 pm, quite a fine day. Sent P. Royal up to Hamilton. Did not fire up in lighthouses tonight.
  - 8 Raining heavily with the wind from the east, noon much rain fallen, wind dying away, Evening wind strong from west.
  - 9 Cool, wind NE. atmosphere very damp, noon showers of rain, took the large scow round the NW pier, P. Royal in at about half past 6 PM. One Locomotive with three tenders, much rain in the night.
  - 10 Plain with dull heavy moist weather, P. Royal discharges one locomotive and one tender. [?] Charlotte discharged two tenders. Noon still raining; P. Royal sailed.
  - 11 Cool with a light breeze from the west. Morning clear and fine. Noon quite fine and mild.
  - 12 Cold clear morning. Crows flying to the north. Noon turned out a very fine day, wind W.P.W. Several people from the square.
  - 13 A fine mild morning, Noon the weather remarkably fine. Sparrows first began to whistle, wind light from the west. Called on Mr. Hill, carpenter gave order for a new punt. I went up to Hamilton.
  - 14 Came down from Hamilton fine mild weather with a little rain, noon quite a warm wind. No fire required.
  - 15 Dull cloudy morning perfectly calm, Noon mild with heavy thunder and lightning squalls. Water rising.
  - 16 Calm mild morning, Noon a perfect gale from the west large scow got more damaged, no fire required and mid day
  - 17 Cool and cloudy, no wind towards noon a little snow, evening a heavy snow storm or squall.
  - 18 Clear but a cold stormy morning wind NW. Noon still very cold and windy, left fire on all day.

## **Appendix D**

### **Visitor Centre and Restoration Criteria**

The Ontario Ministry of Culture issued criteria for the design and development of museums several years ago, which, with site-specific adjustments, has provided a base-line set of criteria for many projects with which we have been involved. We have provided these criteria below, with some commentary, as a preliminary guide for development of facilities under Option 2. These criteria must be considered as a starting point and will have to be examined and modified as more detailed planning develops site-specific needs.

#### **D.1 Design Criteria**

Museum standards are recommended by several agencies including the Ontario Ministry of Culture and the Canadian Conservation Institute (CCI). Recently, museum standards as published by ASHRAE (American Society of Heating Refrigeration and Air Conditioning Engineers) manual have adopted more flexible rules for the introduction of climate control systems in museums housed in historic buildings. This stems from research done in the U.S. (Smithsonian) and Ottawa (Canadian Conservation Institute) and as the result of findings of conferences sponsored by the Association of Preservation Technology in the early to mid 1990's. However, an interpretive centre built in a new structure should be designed to accommodate full museum standards in regards to temperature and humidity control, security and space use to ensure that there would be no restriction on potential exhibits, which might be attracted to the site.

As a key and visible site adjacent to a highly travelled tourist route, there is an opportunity to develop the museum as an attraction in its own right by means of an architectural competition. A signature design would be capable of attracting visitors as well as attracting passers-by for tourism information, cultural tourists, and recreational visitors to the canal. Several examples of these signature museums exist, but one should not negate the fact that the site must be developed in concert with an appropriate management process to ensure long-term success.

#### **D.2 Restoration and Adaptation Philosophy**

Restoration philosophy should not be confused with restoration approach. Restoration philosophy is governed by several international charters, such as the Venice Charter, which defines our approach to the conservation of heritage monuments.

The restoration approach to be taken with the final option chosen must respect the heritage character and minimize interventions that may detract from such character. This includes the design of any adjacent visitor centre, which should have a design, which complements and showcases the existing structures on site.

#### **D.3 Design Concept**

We provide a general overview of recommended spaces for an interpretive centre.

##### Reception and Orientation Area

This space will accommodate the principal lobby and reception counter. It will include the orientation gallery, which will familiarize the visitor with the mandates of all parts or partners of the site as well as give directions to off-site facilities in the community. In addition, direction will be provided to exhibits within the building. These spaces are seen as permanent exhibits with relatively few changes except in areas of events notification. The Reception/Orientation area will also be the location for any "donor

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recognition” systems that may be developed as the result of capital and endowment campaigns that may be undertaken.

## Audio-Visual and Meeting Space

A small theatre (85 to 125 seats) used for the general introduction of the facility, the site, the community and its heritage. This space should be versatile and flexible. The space will be primarily designed as an audio-visual centre; it should be able to function as a lecture hall and venue for film showings. It is not seen as a full-blown performing arts centre although it may be provided with facilities to accommodate musical performers.

## Temporary Exhibition Gallery

This gallery will provide a venue for special events such as receptions and travelling exhibitions. The space is seen as occupying some 1,200 to 1,500 square feet.

## Shared Curatorial Space

By far the largest single space allocation will be for curatorial functions, such as collections storage including reserve collection storage for artefacts dedicated to this site. However, if a central curatorial space is developed for the City of Hamilton at an alternate site, the size of this area could be reduced accordingly. Cataloguing facilities will be located here, as will such functions as exhibition label production and photography. This space will also accommodate the archival collection of the site.

This area will also include staff entrance, shipping and receiving, object isolation areas, conservation workrooms, exhibition workshop, building maintenance shop, crate storage area and a waste disposal room. Again, some functions if in place at a municipal central curatorial area, may be deleted from this site – particularly conservation workrooms.

## Permanent Gallery

This gallery would hold a permanent exhibition, which would include all of the themes determined to be the mandate for interpretation of this site. We recommend a gallery of between 1,500 and 2,000 square feet for this purpose.

Some interpretation panels or features can be installed in the Keeper’s Cottage if it is determined not complete a full restoration of the interior.

## **D.4 Detailed Space Use**

The proposed development of an appropriate building program for the site flows from the results of the analysis contained herein. However, the proposed building program must be considered conjectural and based on what would be deemed to be a reasonable facility to suit the needs of the site and the community at large until more detailed programming studies can be completed. Factors which may have an impact on the scope of the project include the wide range of potential interpretive themes; the potential for major corporate support and individual support in the form of both financial and material donations; and the potential for support (or lack of support) from the City of Hamilton and the Federal and Provincial governments. It is noted that as of the commencement of this study, there was little or no financial support available for the development of a site such as this. However, as a consequence of the economic downturn, substantial grants have become available for cultural projects and may range from 1/3 to 1/2 of the value of “shovel ready projects”. It is our understanding that a project will be deemed, under this program, to be shovel ready on hiring of an architect or other design consultant for the work.

Space and facilities required to store and preserve a collection, accommodate public activities and house all museum functions including visitor services are based on the findings of the report. Given the variety of

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potential options in terms of location, of size, interpretive themes, etc., and because this report is not a design study, we have not provided a graphical representation of a potential layout.

## Size

We have recommended a suitable floor area for this site at 10,000 square feet, which is typical for visitor centres and park structures. The floor area related to the proposed size can be broken down into a series of uses, the size of which are based on a percentage of the overall floor area as follows:

## Exhibits

The size and type of exhibit space is normally determined from the range of artefacts in a collection and how a museum is operated. For instance, if the artefacts are of small scale and can be displayed in cases, the scale of a gallery may be markedly different than a site dedicated to the display of agricultural or transportation equipment. Beyond the permanent display of artefacts held in a collection is the issue of the promotion of temporary exhibitions and the receipt of travelling exhibits from other sites. Of the total area of the building, exhibits will require approximately 30% or from 3,000 to 3,500 sq. ft. If temporary or travelling exhibits are deemed to be essential to the success of the site, this total area must include a percentage for such a use. For this site, because of a relatively low number of artefacts held in the collection, it can be assumed that at the outset the emphasis will be on travelling rather than temporary exhibits. Of the exhibit area we assume that ½ of the area, or 1,500 to 2,000 square feet, would be temporary exhibits and the remaining area devoted to space for travelling or temporary exhibits.

## Storage

We cannot assess the ultimate quantity or size of potential collections for this site, as such materials will be contingent on the final selected interpretive themes. The standards, which apply to museums in Ontario, require a 30% portion of any new museum to be set aside for the storage of a reserve collection. Given our review of potential interpretive themes, it appears that at the outset this space would be largely unused but could rapidly be occupied with donations. Given the nature of this site, and the potential for marine artefacts, storage of large artefacts may require an even higher percentage of space. However, storage of such machinery, for an example, can be accommodated in separate buildings provided sufficient space is available on site for the general collection.

## Archives

As a preliminary size, it is proposed that the archives function be approximately 5% of the total project. This would include a curatorial and research area plus an area for shelf storage of archival records.

## Theatre

In most museum and interpretive sites, it is desirable to have a space, which can be used as a theatre for film or lecture presentations and which can double as classroom space. The size of such a space will vary according to the type and size of audiences expected. As the actual mixture of future programming initiatives can be considered to be open-ended, we have taken the position that initially such a space should hold approximately the equivalent of two classrooms (100 persons). This is slightly more than two school bus loads and represents an area of approximately 1,500 sq. ft.

## Curatorial Spaces

Curatorial spaces include offices for staff; clean workrooms for curation of artefacts; dirty workrooms for receiving and cleaning objects (to avoid contamination of the main collections) and a carpentry shop (for exhibit preparation). In small community museums, the size of these functions may not be large in relation to their importance for the operation of the site. An assumption can be made that these will require approximately 15% of the total floor area.

## Other spaces

These include janitorial rooms and mechanical/electrical spaces. In general, such spaces usually require approximately 5% of the total floor area of a given site assuming that the key mechanical equipment is rooftop mounted. The required area may increase if all such functions are contained within the bulk of the main building. An alternative is to have sufficient space on site to accommodate a service compound.

## **D.5 Environmental Requirements**

Many classes of sensitive artefacts, such as veneered wood furniture, native artefacts, collections of inlay and bone and others, respond rapidly to changes of temperature and, especially, humidity. Rapid humidity changes, in particular, cause deterioration of important collections and it is generally the policy of museums to ensure that environmental controls are put in place to avoid such damage.

The museums must be able to contain high humidity levels in winter without deteriorating. High humidity can cause damaging condensation in inappropriately designed buildings posing a conflict between the needs of collections and artefacts and the buildings housing them. A site should be able to maintain a daily average of 55% relative humidity in summer and no less than 35% humidity in winter (plus or minus 2% in a 24 hour period). Likewise, temperature should be maintained with a 1 degree plus or minus level within a 24-hour period and is generally considered acceptable at approximately 20 degrees C.

## **D.6 Access to the Site**

The site is located on Eastport Drive, which is a good alternate route for those passing both east and west on the Queen Elizabeth Way. Signage must be placed on the exits leading to Eastport at either end of the site – travelers can be informed through brochures and media that their detour to the site will cause virtually no increase in traveled distance or confusion in direction of travel and the interest among tourists may be enhanced should they encounter a delay by operation of the lift bridge.

Various options were presented for the alignment of Eastport for the now abandoned Fisherman's Pier development. None would have had a detrimental impact on travel patterns for those visiting the site and any future project of a similar type could be supported.

Parking for a new museum would be governed by local zoning and planning requirements. Typically, spaces should be based on the net area available after exhibit installation (except for temporary galleries) rather than the total area of the building. Parking should be located in a manner that is easily accessed from the street but in a location that is not detrimental to the ambience of the completed site.

The building must meet accessibility requirements for the physically challenged in order to be in accordance with prevailing building codes. Receipt of grants in support of a new project will be contingent on these requirements being met.

## **D.7 Codes and Standards**

As an assembly occupancy, the site will have to be capable of meeting legislated requirements regarding health and safety issues. These include fire exits (including width, number and access); flame spread (rate of flame propagation) of finishes; number of washrooms; exit lighting; floor loading requirements; and a panoply of other requirements. Assembly occupancies require among the highest standards for these systems and these standards increase with the numbers using the building based on its size.

## Alarms

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Alarm systems include both fire and security system installations. While relatively easy and inexpensive to install, security systems are rendered more effective when installed in buildings, which have natural supervisory capability. Thus buildings with many windows in isolated areas may be more prone to security breaches than those in urban sites with occupied buildings nearby.

Response to alarms is also an issue. Rural areas require a longer travel distance for fire and police than urban areas. These issues may have an impact on the capability of the site to attract major events in the form of traveling shows from major museums if the security concerns are not addressed in the design of the site.

## D.8 Phasing Recommendations

Phasing of the restoration and construction of a new visitor centre should be done in a logical sequence to ensure that the site is both protected by early and timely interventions which may need immediate care and developed in a manner which fits the needs of a growing combination of collections and programming.

The ultimate pattern of phases should be developed in conjunction with the pre-planning and design for the site.

## D.9 Construction Costs

We have analyzed and provided a preliminary projection of capital costs for a 10,000 square foot facility. The costs include the following:

- Site Development
- Building Construction
- Furnishing and Equipment
- Exhibition Preparation and Display
- Professional Fees
- Contingencies

The costs presented should be considered a Class “E”- accuracy of +/- 30% due to the conjectural nature of some of the decisions at this stage. Costs are based on current market conditions based on three current museum projects under way by the consulting team (plus extrapolations from costs at several other sites) and are subject to arbitrary changes in scope of work or quality of execution. They are presented solely as a starting point for more detailed investigations of cost, as the full scope of the work becomes known. We note that, given the economic downturn combined with upside construction infrastructure stimulus, costs may vary considerably from recent past experience.

### **Cost (Visitor Centre)**

Item	Estimated Cost	Unit	Budget Total
Site Development including paving and landscaping	Estimate		\$ 200,000
New Construction (approximately 10,000 sq. ft.)	Approx \$300/sq.ft.		3,000,000
Furnishing and equipment	Estimate		200,000
Exhibit preparation and display (2,000 sq. ft.)	\$200/ sq. ft.		400,000
Subtotal			<b>3,800,000</b>
Professional fees			400,000
Contingencies			570,000

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Total Project		<b>\$ 4,770,000</b>
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## **D.10 Property and Costs**

We have not assessed a value for purchase of land for the purpose of operating the Lighthouse and Keeper's cottage as a small site or as a site including a curatorial centre. Any costs associated with a land transfer must be established in negotiation between the City and DFO/PWGSC. Costs could range from zero dollars to market value, although market value itself can be deemed volatile in the present economy.

The financial results of a property transfer must be added to the capital cost of development.

For the purpose of operating a curatorial centre, it is our opinion that the minimum area required would be in the order of 1.5 acres or approximately 65,000 square feet to accommodate a visitor centre, the two heritage buildings, and associated access routes, parking, and service areas. Additional space would provide for additional opportunities in programming at the site. We have approximately illustrated this potential area as a green rectangle on the aerial views shown in Chapter 2.

If Option 1 is selected, the same amount of land should be sought to allow the site to expand into Option 2 at a later date.