Planning cultural capital projects

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The reasons for undertaking capital projects are limitless; your favorite donor has offered their extraordinary collection; the gallery roof is leaking; there is no space for engaging school kids; it is time to refresh the museum/gallery’s mandate; and the local economic development agency wants to use the facility in one of its key tourism strategies. Before you begin this all-absorbing, rewarding but potentially high-risk project, it is critical that you understand what is needed and how best to deliver.

The City of Vancouver has a small team dedicated to helping arts and culture organizations and artists with their cultural space projects. Through the infrastructure grant program, regulatory and technical assistance, portfolio of cultural spaces and various partnerships, staff advise on a myriad of issues related to space for arts and culture. Many people think raising funds is the hardest part.

Experience has shown that groups often have the greatest difficulty with their “case for support,” that compelling narrative underpinned by serious research and critical analysis which outlines “why” a capital project is needed and “how” it is going to be viable. Whether for government, foundations, the corporate or philanthropic sectors, all are looking for that credible persuasive case for support.

Where to begin?

Regardless of project or institutional size, groups are advised to start with their Strategic Plan. Without an up-to-date strategic plan that rigorously defines where your museum or gallery is headed, you cannot possibly know how a capital project fits into that trajectory. Are your audience numbers on the
rise or decline? What kind of programs does the organization deliver now, what about five and ten years from now? What changes are occurring in your operating context, for example demographic or funding shifts, or even the media your institution uses to deliver programs? If a capital project is in your future, then your strategic plan had better take that into account—it is a fundamental component of your operation—the reverberations of which will be felt through every facet of your organization, during and long after the project is completed.

Part of your strategic thinking should include a solid, honest analysis of the ecosystem in which your institution operates.

What is your museum or gallery’s particular niche? What gap do you fill that no one else can? Cultural institutions too rarely invest in Demand Analysis Studies. We tend to rely on our sense of the situation, our personal knowledge. We also tend to consider what we do to be absolutely unique and critical. While all that may be true, a good Demand Analysis will prove it by putting “anecdote into evidence” and building the foundations for a credible case for support.

Driven by challenging real estate markets as well as the growing impact of the “sharing economy,” the last decade has seen a massive shift in thinking about space for non-profits, with a focus on how to be more connected and innovative. It is worth considering current trends in social purpose real estate and whether co-location, shared space, shared services or non-profit centres have a bearing on your project.

Left: “When humans turn 50, they go to the doctor for a check-up. When aquariums turn 50, that check-up is about crumbling concrete and rusty pipes. The Vancouver Aquarium took a critical infrastructure situation and turned it into a revitalization opportunity.” Dr. John Nightingale, CEO and President, Vancouver Aquarium Marine Science Centre. Pictured: new entrance to the Vancouver Aquarium opened 2014.

Photo credit: Ema Peter

Right: “In the end we are a museum about a mine and mining. What we’ve been able to do with the capital project is earn a place in the discourse around resource extraction in British Columbia. We created a space in which multiple stakeholders can trust and engage. We are not neutral, but ours is a safe place for tricky conversations.” Kirstin Clausen, Executive Director, Britannia Mine Museum. Pictured: Britannia Mine Museum re-launch 2010.

Photo credit: Britannia Mine Museum
Regardless of the size of your institution or capital project—from storage room reno to major new facility, there are critical steps in the process that need to be considered. Each project is unique and the path is not a linear one. You will also need to access expert advice. Your board chair may work in the construction industry; however, this does not necessarily make them a good cultural facility project manager. It might make them an excellent chair of your facilities committee working with you on the project. Take advantage of the real estate and construction professionals—well selected and directed, they will save you time and money.

Stakeholder/community consultation and engagement is a vital component of any capital project, not only to ensure you have good quality information at the right moments in your planning and construction processes, but also to bring the various communities along on the journey. Staff, volunteers, stakeholders, elected officials and the general public are all essential contributors to any capital project, not to mention fundamental to capital fundraising campaigns.

Once the decision has been made to proceed and depending on the complexity, a number of studies might be required to help fully understand and plan your project. For major renovations or new construction a *Functional Plan* and a *Building Program* are highly recommended. These types of reviews take data from your strategic plan and demand analysis and begin (at a high level) to lay out what spaces might be incorporated by function and square feet (e.g. exhibition, collection, audience and admin spaces). They will also set out suggested adjacencies (e.g. ensuring the loading bay is close to the storage area) and provide a sense of what specialized equipment is needed (e.g. temperature and humidity controls). This may be your first real glimpse at the total square footage and the estimated cost of your renovation or new facility.

The *Functional Plan* and *Building Program* are vital pieces of work that enable discussion, decision-making and ultimately delivery of a functional end product.

Are you renovating or adding to an existing facility? Does your site have multiple buildings or venues? A *Facilities* or *Site Master Plan* might be useful to help assess the current assets, sort out priorities for upgrading or new builds, understand site restrictions and establish priorities for phasing in the work. A good starting point is to undertake a *Building* or *Facility Condition Assessment*. Each capital project is unique and iterative and pending the needs of your project, the order of these studies may alter with the *Functional Plan* completed first, followed by a *Master Plan* and then a detailed *Building Program*.
Other studies that might need to be undertaken could include a Real Estate Analysis, the all-essential Fundraising Feasibility and Business Case/Analysis. The Business Case/Analysis for a new or significantly renovated space is essential in building your “case for support”. Will the capital project be financially feasible? Will the resulting new facility be operationally viable? While both are essential to understand, it is the latter that often gets lost in the excitement of imagining what the new museum or gallery is going to be. There will be changes to your operating costs especially if you are adding square footage. Perhaps some costs will go down due to increased building efficiencies. Most likely costs will go up. Staff, board and funders need to understand the operating cost implications of the planned capital project.

It should go without saying that establishing a rigorous and accurate capital budget is vital to a successful project. As information becomes available, the capital budget will grow and evolve. Understand your needs (versus wants), what is viable and make a commitment to stick with the plan and budget. Much time and resources can be wasted due to unplanned changes or unrealistic budgeting.

Finally, the entire institution is ready for designing the new space. It is completely understandable to want to begin with design, but much more effective if your contractor/architect has the information available from the previous steps mentioned above. Conceptual Drawings in the early stages once the Building Program and Functional Plans have been completed can give visual drama to what is being proposed. But it is only after the assessment of the

Diagram: Capital Projects Planning Cycle.
Credit: Jacqueline Gijssen
options, costs and priorities that the detailed design process can begin. Depending on the size of the project, weeks or months, sometimes years will pass as the project designs evolve and are refined, finally resulting in development and building permit drawings. These will lead to securing various approvals and ultimately, the day when construction begins. Although you will only be part way through the capital project, so much of the hard work will have been done; it will now be up to your design and construction professionals to realize the vision for you. A thousand decisions will remain to be made, but with the foundational work completed and guidance from your professionals, these next steps should be straightforward and timely.

Once the capital project is done and the opening ceremonies are behind you, staff will begin to work in the new spaces. This is the moment where deficiencies need to be addressed by your construction team. From there it will be time to turn your attention to ongoing preventative maintenance that will take care of the facility and extend its life into the future. A wise investment would be to establish a Facility Reserve Fund for emergency capital work and to begin saving for longer-term recapitalization. All of these steps are vital to keeping this fine new/renovated asset in the best condition possible for many decades to come.

Jacqueline (Jacquie) Gijssen is Senior Cultural Planner for the City of Vancouver where she works to enable the sustainable creation and operation of cultural spaces through long range policy, investment, programs and capital projects. Prior to joining the City, Jacquie enjoyed a 25 year career in the museum and gallery sector in BC.

Online resources for museum/gallery capital projects

City of Vancouver:

http://www.vancouver.ca/people-programs/cultural-infrastructure-grant-program

- **Cultural Spaces Self-Assessment Checklist** has assisted dozens of arts and culture organizations to think through their prospective capital projects and establish a project critical path that is right for their institution.
- **Grants Recipients Previous Years** is a useful resource for finding groups that have undertaken similar projects and who might be able to advise on potential consultants or suppliers.
- **Canadian Capital Funding Sources for Cultural Projects** is a list of possible funding sources for cultural capital projects. Don’t forget to check your local foundations and regional districts for possible funding support.

Other Links:

- **Non Profit Centres Network**: [www.nonprofit-centers.org](http://www.nonprofit-centers.org) offers a vast array of resources and training opportunities for those interested in shared space and non-profit centre models.
- **Social Purpose Real Estate Collaborative**: [www.socialpurposerealestate.net](http://www.socialpurposerealestate.net) is a Vancouver based collaborative of funders and investors seeking to assist non-profit and social enterprise organizations with their real estate needs.
- **Artscape** is a Toronto based organization that offers DIY—a do it yourselves website of information and links for cultural capital planning and project delivery [www.artscapeDIY.org](http://www.artscapeDIY.org).