



City of Vancouver Update to Key Gaps in Cultural Infrastructure

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AMS Planning & Research Corp.

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Introduction

The City of Vancouver initially engaged AMS Planning and Research on a *Review of Performing Arts Facilities* (referred to as the Performing Arts Study) and later to update its 2008 *Cultural Facilities Priorities Plan* (this study). This report is provided to summarize the study process, methodologies employed, and findings associated with this task. Detailed interim reports, presentations, and supporting data are appended in the interest of additional context.

Two Studies Merge

The *Performing Arts Study* was designed with the goal of understanding the unique needs, opportunities, and challenges associated with Vancouver's Civic Theatres and other performing arts facilities throughout the city. This study was naturally focused on a sub-set of disciplines, artists, and arts organizations. In the course of gathering and synthesizing information for this effort, it was determined that a larger assessment was necessary to chart a path forward for the entirety of Vancouver's arts and culture sector. This effort, the Key Gaps Study, was designed to capture a much larger picture of Vancouver's arts and culture sector opportunities and challenges, inclusive of visual art, media, and individual artists working in a variety of forms—in addition to the performing arts constituencies already represented. In the interest of crafting the most effective and comprehensive civic approach to advancing cultural vitality, these two studies were consolidated.

Initially evaluating the landscape of performing arts facilities and then expanding to include arts and culture spaces beyond the performing arts, the study began with the following key questions:

- What are Vancouver's cultural sector's assets and strengths?
- What are the major challenges affecting arts and cultural organizations and individual practitioners in Vancouver?
- What is the current scope of unmet demand and available supply of arts and cultural spaces throughout the City?
- How should the City leverage and deploy its support of cultural facilities?
- What should the criteria for decision-making be?

Study Methodology

The scopes of work reflecting the Performing Arts Study and the Key Gaps Study included extensive data collection and synthesis. AMS engaged in a far-reaching data collection process to build an understanding of the City of Vancouver's unique arts ecosystem, and the opportunities and challenges therein. Research components were compiled using the following tools and techniques:

Background information and documents provided by the City of Vancouver. Ranging from market scans, historic planning documents, policy briefs, and City-produced venue maps, to detailed historic operating data reflecting financial and activity trends relevant to civic theatres, the City provided a wealth of information to ground the study in robust historic and up-to-the-minute data.

A demographic market analysis. Using AMS's proprietary market analysis tool,¹ a demographic market analysis was generated focusing on the City of Vancouver, with benchmark data representing the Vancouver Census metropolitan area; the Province of British Columbia; and Canada's national demography. Detailed analysis of this material can be found in Appendix 4.

Two far-reaching surveys of facility users and operators, as well as visual and media artists, and other individual artists, garnered over 500 responses from individual artists and arts organizations (see Appendices I and 6). Survey links were emailed to over 400 cultural grantee organizations, as well as to the expansive Cultural Services listserv. The survey links were also circulated virally using social media, email, and other virtual tools. The surveys were fielded for over two months each, in an effort to gather a robust response from diverse stakeholders.

The data acquired through these tools, in combination with roundtable meetings and in-depth interviews with arts organizations and practicing artists, guided early analysis of the gaps in Vancouver's performing arts infrastructure.

These data have informed the combined scopes of work and the resulting analyses, synthesis, and recommendations. The synthesized data substantially informed the ultimate development of criteria for decision making related to investments in Vancouver's arts and culture sector, as described at the close of this report.

I. What's Happened Since 2008

In support of the City's mission and values, the 2008 study² identified needs in space affordability, leadership capacity, information sharing, partnership development, and resources. Overall, this study urged a shift from the "planner-provider-deliverer" model to an "enabler-convener-catalyst-broker." This strategic change would encourage collaboration, innovation, and capacity, and created a foundation for supportive policies and programs. Significant accomplishments traceable to this study's findings include:

- The opening of 12 new spaces totaling 156,678 square feet, serving 30 nonprofit organizations and 34 individual artists. These spaces include Woodward's, BMO Theatre, The Post (CBC), Arts Factory, four Artist Award Studios, The Annex, VSO Music School, the York Theatre, and Britannia Carving Pavilion.
- Distribution of Cultural Infrastructure Grants. Leveraging \$9.36 million in grant monies, these grants ultimately leveraged over \$60 million in support for 236 local projects, led by 135 different organizations. Infrastructure investments ranged from planning efforts, to repairs and major renovations, to the purchase of spaces.
- Upgrades and expansion of existing City spaces. Approximately \$100 million in capital, existing spaces were upgraded and renovated. These include significant renewal of the Queen Elizabeth Theatre and Plaza (\$73M) as well as

¹ See www.claritas.com for additional information.

² Creative City Task Force, *Culture Plan for Vancouver 2008-2018*, City Of Vancouver Cultural Facilities Priorities Plan, Final Report, May 2008; City of Vancouver, *Policy Report Culture*, June 2008

the Vancouver East Cultural Centre (\$14.5M), Museum of Vancouver (\$7M) the Maritime. Orpheum (\$2M) Museum (\$1.5M), the Police Museum (\$0.7M), Roundhouse Plaza and Malkin Bowl (\$2M).

- Protection of existing private spaces, using cash Community Amenity Contributions to enable Western Front to purchase the building and grant gallery to pay off their mortgage. The City also purchased the St. James Community Square and the Historic Joy Kogawa House.
- Reduced red tape surrounding regulations and permitting, by providing technical assistance, workshops, and permit fee subsidies; updating by-laws and streamlining processes through the Regulatory Reviews for Live Performance Venues and Artist Studios; and creating the Arts Event Licence Program.
- Planned for arts and culture, by working with the community to integrate arts and culture into city planning efforts, for example False Creek Flats, Northeast False Creek, and Cambie Corridor Phase III plans.

The 2008 report identified nine specific gaps, which have guided department priorities and cultural infrastructure grant allocations. The City is:

- Funder, through approximately \$1 million in annual infrastructure grants
- Partner, with developers and non-profit cultural organizations working to expand arts and culture facilities, and
- Landlord to over 80 cultural non-profits³

Despite achievements since 2008, gaps remain, particularly among non-performance arts and culture groups, as Vancouver continues to experience rapid growth and escalating real estate costs.

³ City of Vancouver Cultural Services data.

Mission and Values of the City of Vancouver

Vancouver's mission and values are reflected throughout the study, and were instrumental in crafting the final list of gaps and criteria that represent the 'capstone' deliverables.

Mission

Create a great city of communities that cares about our people, our environment, and our opportunities to live, work, and prosper.

Values

We conduct ourselves based on these six values:

Responsiveness: We are responsive to the needs of our citizens and colleagues.

Excellence: We strive for the best results.

Fairness: We approach our work with unbiased judgement and sensitivity.

Integrity: We are open and honest, and honour our commitments.

Leadership: We aspire to set examples that others will choose to follow.

Learning: We are a learning workplace that grows through our experiences.

Figure 1: City of Vancouver Mission and Values

II. Vancouver's Unique Context and Issues

With input received from interviews, community meetings, City staff, and available data, AMS examined the current market, arts spaces, and strengths and challenges of Vancouver's arts and culture community. This effort was further grounded by reference to the City's mission and values.

Market

Arts demand indicators for the City of Vancouver are strong. Vancouver's population is young, with 35% of residents between ages 25-44. The population is also highly educated, with 44% of people ages 25-64 holding a Bachelor's degree. Additionally, Vancouver's population is racially diverse, with 52% identifying as

non-white.⁴
But several

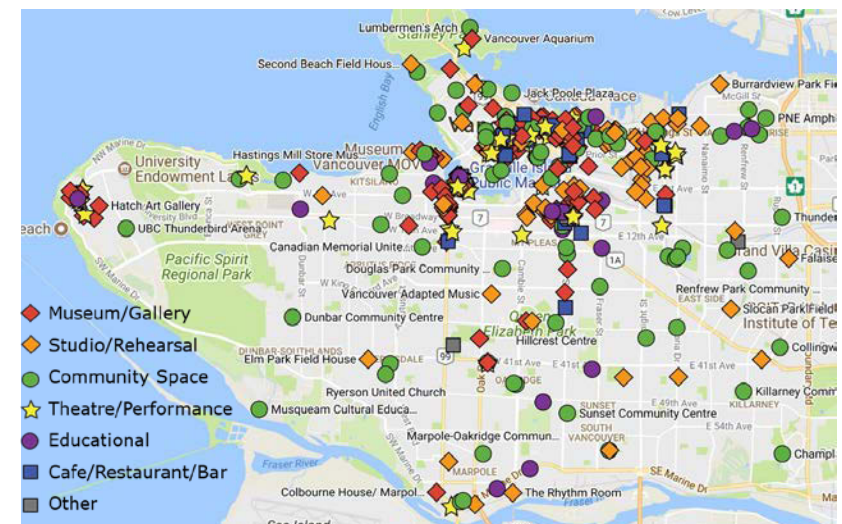


Figure 2: City of Vancouver Cultural Spaces Map 2017

⁴ Source: Statistics Canada, 2016 Census of Population, 2011 National Household Survey.

indicators point toward serious pressures on artists and arts organizations. Vancouver's income inequality is 2.5 times higher than the national average, with high and low incomes over-represented; the City's housing is costly, with the average home pricing topping \$1 million.⁵ Finally, a comparison of provincial arts funding reveals that British Columbia government support for the arts is relatively weak.

These factors in combination suggest thriving arts demand, however the stresses of under-capitalization and costly real estate present a challenge to artists and arts organizations.⁶ The cost of real estate and low public investment may impact artists and arts organizations' choices regarding whether to stay in Vancouver for the long term.

Current Inventory

According to Cultural Services' crowd-sourced and validated Cultural Spaces Map, Vancouver has 336 cultural spaces, which includes approximately 154 visual art and film spaces (33 owned or leased by the City and Park Board), 86 performing arts spaces (29 owned or leased by the City and Park Board), and 135 other community cultural spaces (47 owned or leased by the City and Park Board). The combined 107 spaces that the City and Park Board owns or leases includes the Civic Theatres (Orpheum, Playhouse, Queen Elizabeth Theatre, Annex and QE Plaza); 24 community centres, which incorporate cultural events within their mix of programmes; and 30 non-profit tenants who lease space through cultural services.⁷

⁵ According to data from the Canadian Real Estate Association.

⁶ A youthful, highly-educated population typically correlates with interest in art-making and arts attendance

Strengths Balanced by Challenges

In addition to receiving quantitative input through surveys, AMS also gathered qualitative data through interviews, roundtables, and survey verbatim responses. This critical feedback revealed and underscored key themes regarding the state of cultural space in Vancouver.

It is clear that Vancouver celebrates its prolific arts and cultural scene and much of this activity is happening at a grass-roots level, with a high number of small arts and culture organizations. Collaboration among individuals and organizations is on the rise. The City of Vancouver, and more specifically Cultural Services, is perceived as being a supportive partner and convener of the arts community.

But despite the many positives, interviews and research revealed that the arts and culture ecosystem in Vancouver continues to face challenges in the areas of the local economic and real estate environment, City policies that inadvertently hinder creative activity, and the condition, retention of and availability of cultural spaces. Detailed findings are organized within these three areas, below:

The local economic and real estate environment inform challenges to affordability, space accessibility, and the capacity of arts organizations and artists to pursue opportunities.

- Displacement is a significant concern, driven by rising rents, purchase prices and development pressures. This is reflected in findings in later sections of this report, to

⁷ City of Vancouver Cultural Services Department data.

emphasize the ways in which this issues touches on capacity, policy, and physical infrastructure.

- Artists and smaller arts organizations are undercapitalized. They have limited capacity to acquire more capital; few smaller nonprofits own or otherwise control their space. At the time of this study,⁸ there was no existing dedicated provincial infrastructure funding program. Limited engagement with corporate philanthropy and private foundations undermines the ability of smaller arts practitioners to grow or acquire access to space. Securing financing for capital projects is challenging.
- Private property owners have few incentives to support or retain arts and cultural spaces. Property owners are reluctant to commit to arts tenants for accessible rents. In addition, rising property values and associated property taxes and the cost of upgrading existing private buildings drive property owners to focus on redevelopment and upgrades that allow for much higher rents from non-arts tenants.
- Creating an inventory of arts and culture spaces is challenging. Many spaces do not adhere to traditional or consistent uses of real estate, and are often informally designated 'arts spaces,' blending private venues and personal artist spaces, among other types of space. Further, these informal venues may be operated by entities that do not wish to be surveyed in a formal inventory process.

- As a City of Reconciliation on Unceded Territories, there is very little local First Nations and Urban Indigenous visibility on the land and cultural spaces.
- City policies and processes may (inadvertently) undermine the arts and culture sector.
- Culture is a low priority in City decision-making. The City of Vancouver has high targets related to key strategies such as housing, leaving a narrow margin for other amenities such as culture.
- Arts and culture spaces are not consistently engaged in City capital projects or development opportunities. While arts and culture spaces have been successfully integrated in some community centres, neighbourhood houses, housing projects, libraries, places of worship, major developments and elsewhere; this practice should expand and deepen.
- There is need for expanded mechanisms to better support or secure spaces with cultural, intangible heritage and community significance. This reflects the theme of displacement.
- The arts community expressed interest in City-owned spaces such as those held in the Property Endowment Fund to be more supportive of secure affordable arts and culture uses.
- Development tools such as developer Community Amenity Contributions need more flexibility to support

⁸ During the study timeframe, Department of Cultural Services staff notified AMS on nascent discussions regarding an Infrastructure Fund. The status of this fund is not clear as of this report.

city-wide efforts to serve arts and cultural spaces and constituencies.

- The regulatory environment creates barriers for arts activities and spaces. Restrictions on selling artwork in certain places, as well as on the number of monthly arts events in non-assembly spaces, dampen the ability of artists to show and share their work. Interviewees consider strata artist live/work spaces hard to regulate, and as not providing a long term benefit to the public. As well, lengthy and expensive permitting process is considered a barrier to individual artists and organizations with financial constraints. Further, property tax increases and a focus on economic growth (rather than balance or retention) displaces studios and production spaces, cutting into arts and culture sector capacity.
- Support for smaller organizations and emerging leaders is inadequate, and there are limited available channels for smaller organizations or historically underrepresented groups to cultivate relationships with key authorizers or to secure spaces.
- A lack of operating funding for nonprofit space operators and cooperatives is noted by interviewees and survey respondents. Underrepresented groups and fledgling arts and culture organizations struggle to access existing support. There are limited mechanisms for organizational planning and this difficulty is compounded by a prevalent need for mentorship within the arts and culture community and experienced sector stakeholders and City processes.

Existing facilities are aging out of use, or are vulnerable to displacement by other sectors; certain types of spaces, defined by audience or functional capabilities, are in short supply.

- The rapid pace of development creates challenges to protecting or retaining existing privately-owned spaces. Informal or ‘underground’ venues including performance spaces, studios, and production or rehearsal space are being repurposed for more commercially oriented uses. Existing (or remaining) production facilities for larger industrial art are fully utilized; even so, many are under threat of redevelopment. Finally, existing spaces are commonly under short-term leases, and there is virtually no nonprofit-owned space dedicated to arts and culture uses and users.
- Aging spaces create perceptual and practical barriers. While the City has invested in some venues, such as the Queen Elizabeth Theatre, there are several significant City-owned theatre and museum spaces in need of substantial renewal.
- Physical accessibility challenges are evident in both private and City-owned spaces.
- Spaces purpose-built to enable authentic and diverse cultural expression are in short supply. Spaces appropriate to local First Nations and Indigenous cultural practices and presentation are noticeably absent from the landscape.
- Housing and live/work space, community-owned spaces (e.g., nonprofits), co-located spaces and cultural hubs, and youth-designated spaces were identified in the research as important and largely absent, or already operating beyond their maximum threshold for utilization.
- The City lacks modern performance venues that accommodate a range of production values and disciplines. Flexible incubator spaces, small to mid-range performance spaces co-located with other arts spaces,

music space, and large-scale outdoor performance venues are all cited as in distinctly short supply.

- Administration and retail space is needed. Space designated for these important business functions are needed to support the consistent, secure, and growing business operations of artists and arts organizations. Retail space for individual artists to sell their work is also a concern.

III. Success Defined

Vancouver's arts and culture sector drives value for the City through its content and programming; stewardship of resources and facilities where programming occurs; and the activation of spaces and neighbourhoods. In light of this, it is appropriate to discuss investment in cultural infrastructure as contributing to public value. This weaves the role of the arts and culture deeper into the fabric of Vancouver's business and social sectors, going beyond 20th century conceptualizations of the arts as being aligned with leisure, economic development, or wellbeing alone. A brief exploration of public value follows.

Public Value

Vancouver's arts sector can move beyond simply producing activity to creating public value, moving from sustainability to vitality. Using the framework adapted from the Urban Institute's *Cultural Vitality in Communities: Interpretation and Indicators* (see Figure 1),⁹ moving beyond simply producing activity to creating public value would mean, for instance, placing the arts and culture sector at the center of citywide and community planning efforts. Artists and arts organizations would be integrated in planning and executing the process, with regular access to public officials and resources capable of navigating issues relating to facility development, real estate transfers and leases, traffic and transportation, funding streams, among others.

The public value framework envisions the relationships between realized public value and key stakeholder outcomes. The central

⁹ Maria Rosario Jackson et al, *Cultural Vitality in Communities: Interpretation and Indicators* (Urban Institute, 2006), <http://urbn.is/2Djo3Ws>.

elements enabling public value and creating cultural vitality are presence, participation, and support, described in depth following the graphic representation in Figure 3.

The presence of opportunities for cultural expression in arts organizations and venues of all types, sizes, and disciplines is the first imperative of public value. Participation in those opportunities by attendees, visitors, arts practitioners, students, supporters, critics, professionals, individually or collectively, sporadically or regularly is the second imperative. The third crucial imperative, in which the City of Vancouver has the opportunity to play a substantial role, is support for the creation of public value through presence and participation. A wide mix of opportunities brings a continuum of participation, and if widely supported, results in a robust arts sector.



Figure 3: Public Value in relation to elements of cultural vitality and stakeholder outcomes

Success Defined: Cultural Vitality

The ultimate goal—cultural vitality—is achieved when arts organizations progress from viable (functioning on a day-to-day basis) to sustainable (meeting current needs, delivering on mission, but still under-resourced) to vital, with the ability to reinvest resources to adapt and grow.



Figure 4: From Viable to Vital

IV. Criteria for Decision Making

Using the public value framework—providing opportunities for cultural participation, fostering participation itself, and providing and encouraging support for cultural participation—AMS crafted criteria for *Making Space for Art* to enhance public value of the arts and cultural vitality within Vancouver. Cultural vitality, as the desired outcome, is defined as evidence that the arts enterprises being evaluated contribute to the economic and greater well-being of the community.

By being thoughtful and deliberate with its investments of all types of capital—financial, political, social and leadership to name a few—the City can drive observable results in the arts and culture sector, particularly in relation to cultural facility development and activation, and move Vancouver ahead in realizing its goals.

The criteria are informed by extensive research into best practices of North American grant making programs aimed at facility investments, as well as input from City of Vancouver leadership. Appendix 7 contains background information, descriptions, and the Criteria for Decision Making.

The criteria are organized under five broad groupings:

- **Aligned:** Reflects and advances existing civic and arts goals. Manifests opportunities to meet a demonstrated community need.
- **Vital:** Creates durable opportunities of public value. Enhances opportunities for the arts and cultural community and affected neighbourhoods/districts to thrive and adapt to changing circumstances.
- **Equitable and Diverse:** Reaches diverse communities intentionally and respectfully. Nurtures cultural understanding and mutual respect in respect to

Reconciliation, equity, diversity, and inclusion of Indigenous communities and underrepresented communities.

- **Engaged:** Shows connections to communities defined by discipline, geography, socio-demographic factors, or other factors. Advances opportunities to engage, collaborate and partner on innovative solutions, programs, and operating techniques.
- **Ready:** Demonstrates organizational capacity to lead project planning and implementation, with respect to project scale, intent, and duration. Readiness demonstrated through past accomplishments, current capacity, and forward-looking planning efforts that drive toward adaptability and ongoing, dynamic creation of public value. In communicating readiness, proponents will be sensitive to the context and timeframe of the proposed effort; for example, a construction grant would likely require a detailed timeline for continuing construction and facility operations, whereas a proposal seeking support for a 20-year community cultural facility would not immediately have the same collateral.

Based on the data and input received, the City of Vancouver has an opportunity to leverage investment in the arts and culture sector to drive public value. Central to the proposed criteria are measures to ensure that individuals with knowledge of the proposed project(s) are included in subsequent evaluations.

V. Survey Results and Analysis

The results of both survey instruments are included in Appendices 1 and 6. Key findings from both are highlighted below.

The results of the Performing Arts Study survey were provided to City of Vancouver staff in spring 2016 (Appendix 1 includes key data). This section of the report focuses on findings from the Key Gaps Study. The information here is complementary and reinforces and expands upon the 2016 findings.

As stated earlier, the Key Gaps Study survey was designed to understand current and future programming activity, space use, and facility needs primarily for non-profit arts and cultural organizations based in Vancouver – rather than the more broad creative industries. This survey was emailed to over 400 City cultural grantee organizations, listserv members, and individual artists. The survey was available for four weeks, and 287 respondents reported on 388 cultural spaces. A full data set of survey results can be found in Appendix 1.

Profile of Respondents

While the focus was on non-profit arts and cultural spaces and the respondents included 119 organizations, the study also included responses from 168 individual artists.

Of the organizations, 18% identified as theatre, 14% music, 14% visual arts, and 11% multidisciplinary. While a majority of organizational respondents represent performing arts disciplines—distinct from the majority of individual artist respondents—the sample size and detailed data suggest that this dual approach collecting data served the goal of capturing a nuanced picture of Vancouver’s cultural infrastructure gaps and opportunities.

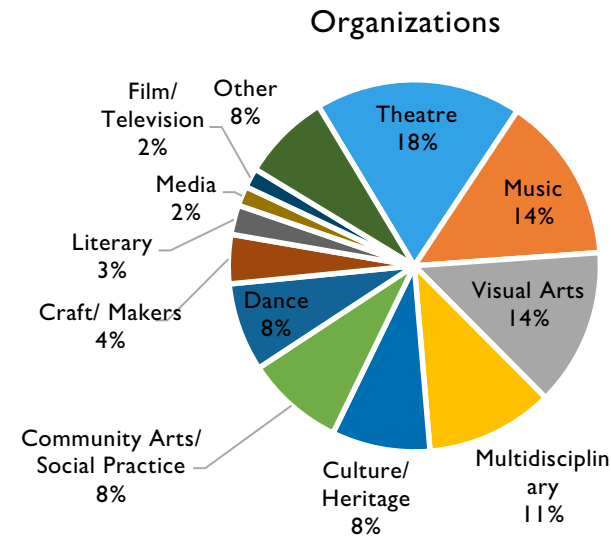


Figure 5: Profile of Organizational Survey Respondents

A significant majority of individuals, 55%, self-identified as visual artists, with the next largest group of individual respondents representing craft artists and makers, at 17% and as such lacks representation of performing artists such as musicians.

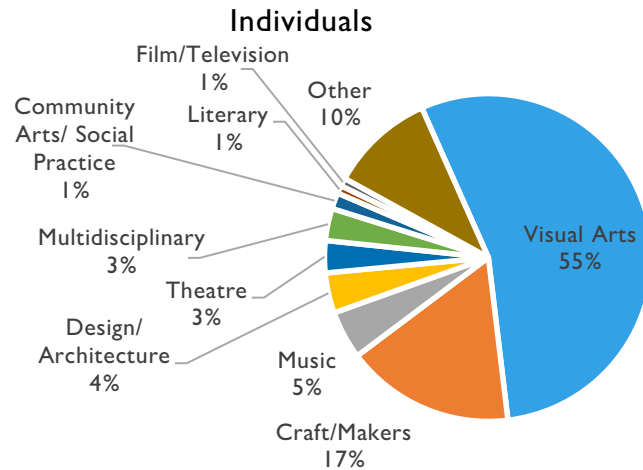


Figure 6: Profile of Individual Survey Respondents

Geographically, while many spaces are neighbourhood-based most all provide city-wide programs.

Respondents indicated that their service delivery area is primarily within the City of Vancouver and the Metro Region.

A majority (77%) of organizations operate on budgets under \$500,000 annually. Of the 78 organizations with budgets under \$500,000, over half (44) have budgets under \$100,000.

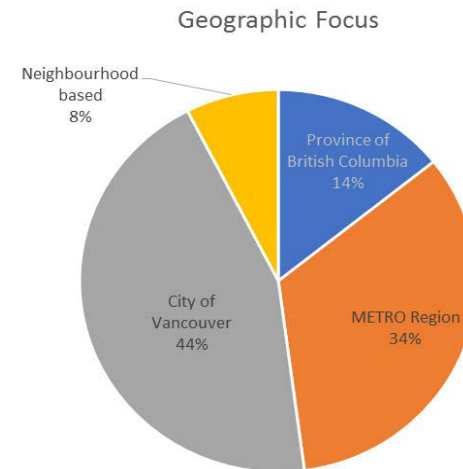


Figure 7: Geographic Service Area

BUDGET COHORTS

Small	Under \$500k	78
Medium	\$500k to \$999k	12
Large	\$1M to \$8.99M	7
X-Large	\$9M or more	4

Current Spaces

Average monthly payments for spaces occupied on a full-time basis by organizations range between \$1.19 and \$2.44 per square foot, with higher averages for certain performance facilities. Average monthly rent for all types of creative space in Vancouver is \$1.98 per square foot (\$23.76/sqft. annually).

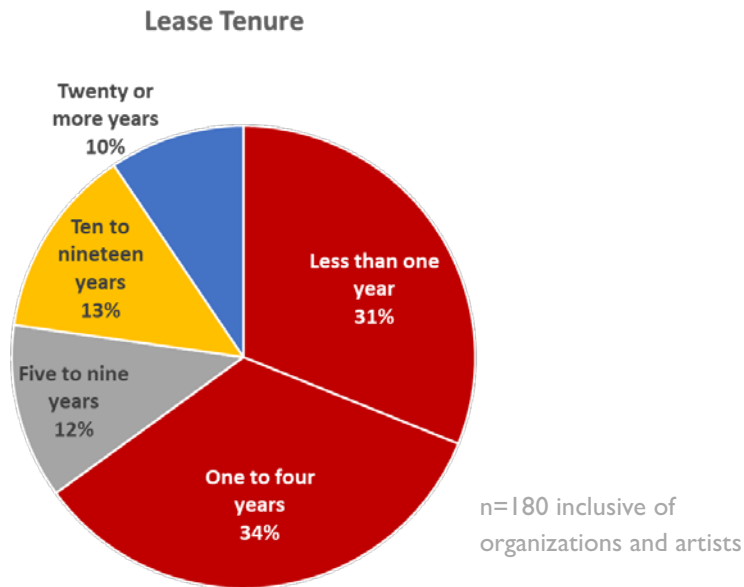


Figure 8: Lease Tenure of Survey Respondents

Most organizations and individuals occupy spaces on short-term, even month-to-month, leases. The majority of performing arts spaces are rented for occasional use, while visual arts spaces are more likely to be leased on a full-time basis. Just six organizations and five artists reported owning their space. Of the six organizations in this group, one is a private organization and the remaining five are nonprofit organizations. Most facility users (65%)

who lease are in short-term leases, with a third in leases lasting less than one year.

Space retention is a critical issue, with half of organizations and two-thirds of individual artists concerned about losing their current space. Most organizations also reported difficulties in finding suitable, affordable spaces—both indoors and outdoors—to rent for special events or for specific dates. Seventy-three percent reported difficulty in renting indoor spaces, and 59% had difficulty renting outdoor spaces.

Future Needs

As identified through the 2017 survey research, what follows are the future needs anticipated by organizations and individuals who responded to the survey. Overall, all respondents expressed optimism about future growth and opportunity.

Organizations

Organizational respondents express optimism about future success and growth. The vast majority (84%) of organizational respondents believe audiences and markets will increase in the coming years and as a result, they will need more space.

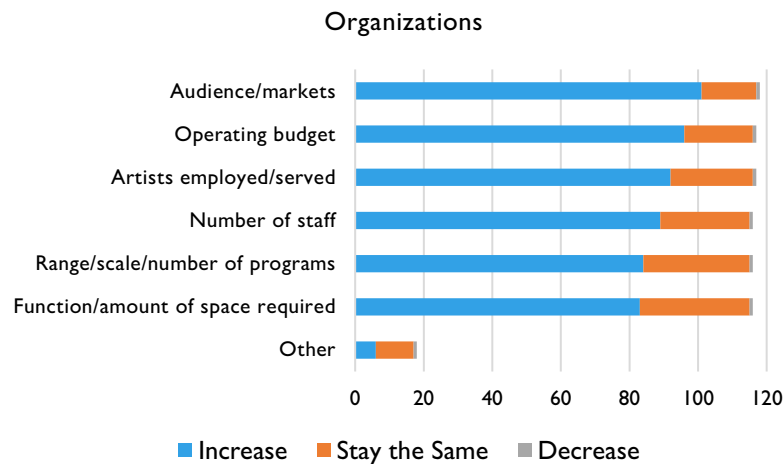


Figure 9: Anticipated future space needs for arts organizations

The types of spaces that organizations say they need are evenly distributed: administrative/office (48%); rehearsal space (42%); flexible/other performance space (38%); storage (35%); artist studios/workshop (35%); and theatre (30%). These data suggest that while the ambition to engage in arts activity is strong, limited space to create is a significant constraint for organizations.

Organizations - Type of Space Needed

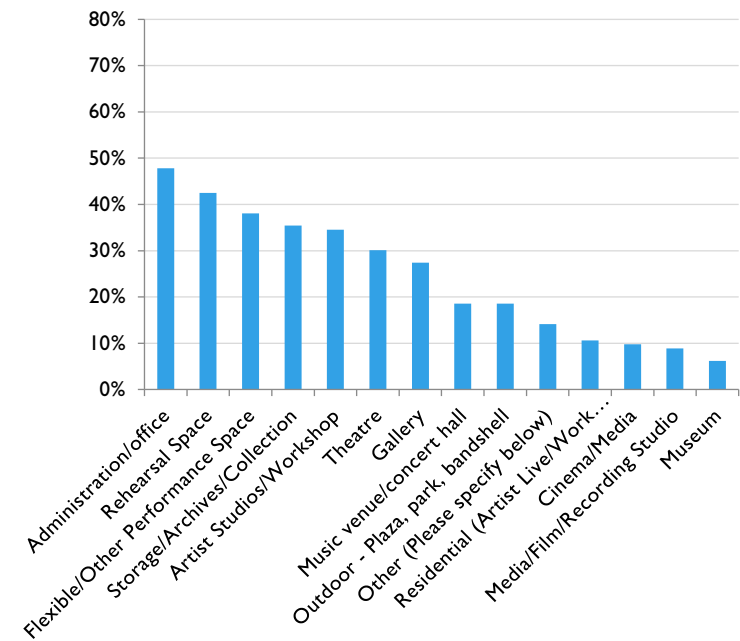
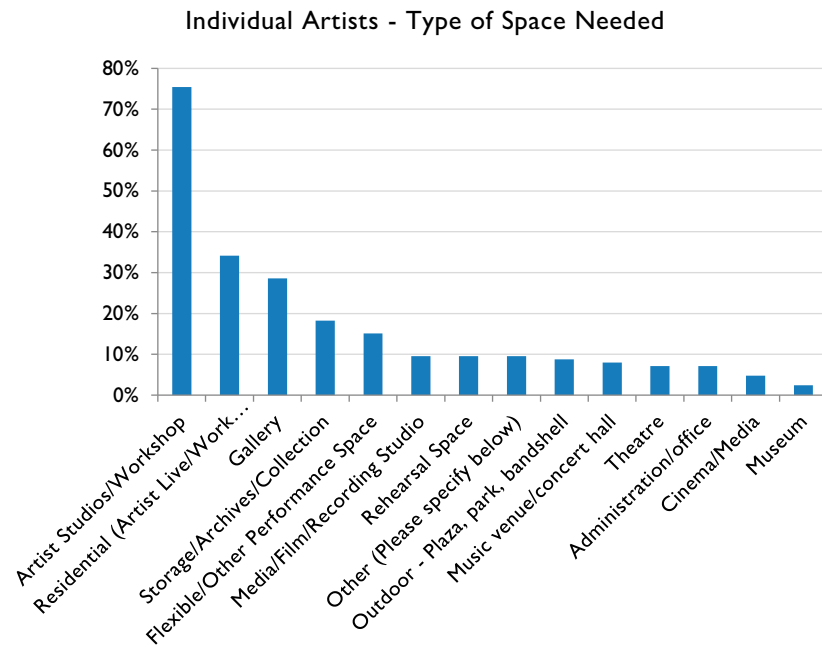


Figure 10: Type of Space Needed by Organizations

Individual Artists

Individual artists show highest interest and demand for studio/workshop (75%), and then residential live/work space (34%) and gallery (29%). Mirroring the results from organizations, these data suggest that the most needed types of space are studios, workshops, and residential real estate—places to live, work, and create art.



Individual artists were slightly less confident about some growth metrics, but overall showed optimism for the future. Overall identified demand exceeds 1.3 million square feet, as illustrated in Figure 12 on the following page.

Figure 11: Type of Space Needed by Individual Artists

Space Type	Organizations	Sq. Ft. Sought	Individual Arts Professionals	Sq. Ft. Sought	TOTAL Entities Seeking	TOTAL Sq. Ft. Sought
Administration/office	54	33,365	9	700	63	34,065
Rehearsal Space	48	37,400	12	5,360	60	42,760
Flexible/Other Performance Space	43	47,150	19	4,900	62	52,050
Storage/Archives/Collection	40	50,579	23	2,190	63	52,769
Artist Studios/Workshop	39	104,714	95	45,700	134	150,414
Theatre	34	116,200	9	3,500	43	119,700
Gallery	31	126,436	36	8,825	67	135,261
Music venue/concert hall	21	70,700	10	6,500	31	77,200
Outdoor - Plaza, park, bandshell	21	314,000	11	-	32	314,000
Other (180,000 is VAG)	16	228,750	12	2,680	28	231,430
Residential (Artist Live/Work Studio/housing)	12	93,400	43	25,825	55	119,225
Cinema/Media	11	14,000			11	14,000
Media/Film/Recording Studio	10	7,400	12	680	22	8,080
Museum	7	11,000			7	11,000

Figure 12: Facility Gaps by Respondent and Range of Square Footage

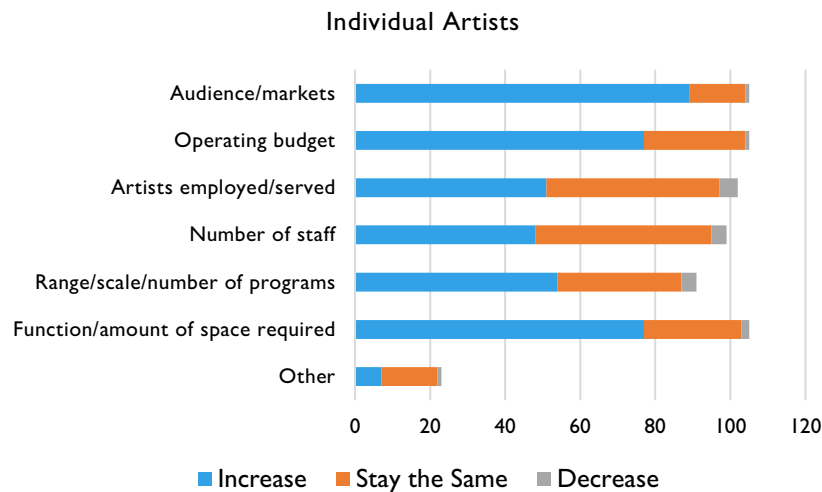


Figure 13: Anticipated future needs for individual artists

Survey respondents indicated that the most important attribute they consider when choosing space is affordability, followed closely by suitability, and then by location factors such as proximity to public transit, markets, or the downtown core.

New Project Activity

Many organizations (106, or 89%) are considering some kind of improvements or upgrades to their current facilities, drawing on a variety of funding sources, including co-development with a partner; fundraising campaigns; and city, provincial, and federal grants, to help achieve these goals. This interest in investment aligns strongly with accepted City priorities, and may be leveraged to advance greater cultural vitality.

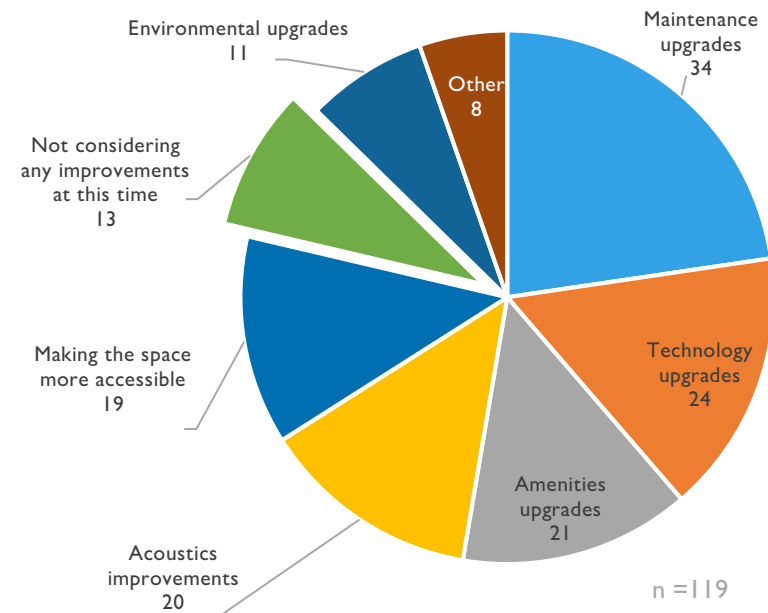


Figure 14: Contemplated improvements to facilities

Vancouver is home to mostly smaller arts organizations, occupying space on short-term leases with little security for the future; there is concern about losing current space. Yet these organizations are also hopeful about future success and growth, which leads to anticipated need for more and better space.

VI. Learning from Others¹⁰

AMS summarized best practices from cities similar to Vancouver to provoke discussion of opportunities and goals. This research yielded the following common practices among exemplar cities:

- Developing and sustaining creative spaces, by leveraging tools including grant-making, zoning, tax incentives, and development bonuses
- Helping artists and arts organizations through technical assistance programmes, professional development, networking opportunities and a diversity of toolkits
- Fostering collaboration between City cultural departments, non-profit developers, and other stakeholders with a shared goal to create affordable arts spaces¹¹
- Engaging the whole non-profit sector in discussions of affordable real estate, convening partners across arts and non-arts disciplines, can make a local arts community's concerns more visible to key authorizers from the public and private sectors
- Cross-sector partnerships that create alliances between arts and cultural community, other social purpose real estate and commercial entities can help smaller organizations expand their capacity for advocacy and programming
- Moving arts organizations from facility user to owner is an accepted priority, in the face of rising real estate costs.

¹⁰ This is a summary of research into trends among cities similar to Vancouver, including: Austin, TX; Boston, MA; Brisbane, AU; Calgary, AB; Minneapolis-St. Paul, MN; Nashville, TN; Portland, OR; San Francisco, CA; and Seattle, WA.

Innovative Examples

The following cities provided especially compelling examples of how municipal departments and coalitions approached challenges similar to those faced by Vancouver.

Ontario created the Assets Planner for the Arts & Mentoring Network, a partnership with asset management and design/construction firms to teach arts organizations the nuts and bolts of facility plans, budgets, and more.

Seattle is focusing on achieving ownership (as opposed to affordable rents) and the city has created a Commercial Space Affordability Task Force within the Arts and Culture office to work specifically on this issue.

Calgary has used funds from the Provincial Municipal Sustainability Initiative, creating a programme called Cultural Space Investment Process for the purpose of allocating those funds to cultural infrastructure projects.

San Francisco is home to a multi-sector collaboration with city, public, and private funding to create the Community Arts Stabilization Trust (CAST), a real estate holding company. CAST purchases properties and then offers affordable leases for these properties to arts organizations. Over time, ownership is transferred to the lessees.

¹¹ Artspace and Artscape are two prominent examples of this type of effort.

VII. The Gaps

Bringing together all of the research, data, and conversations from the scopes of work, we have synthesized the following gaps. These findings are the synthesis of survey input, interviews, and extensive conversation with the City of Vancouver's public agency leadership and arts community stakeholders.

The rapid pace of real estate development makes it difficult to protect and retain existing private arts and culture spaces. Venues are being lost—particularly informal performance spaces, studios, and other production/rehearsal spaces, which are difficult to inventory. Existing facilities in industrial areas for art production are at full capacity and many are under threat of redevelopment. Existing spaces are commonly under short-term leases, with virtually none owned by community non-profits. Vancouver's arts and culture spaces are aging and have accessibility barriers. While the City has made significant investments in spaces ranging from the Queen Elizabeth Theatre, to the Arts Factory creative hub, and created new facilities through the Community Amenity Contributions such as the BMO Theatre and through a density bonus the VSO School of Music and Annex Theatre, there are several City-owned theatre and museum spaces that are in need of significant renewal.

Stable real estate ownership and control is a key to achieving cultural vitality. Organizations and artists need secure leases, to achieve some level of certainty about their spaces; they also need help becoming owners, rather than renters, which would offer the most security. High demand exists for inexpensive production space, affordable housing for creative workers, administrative space, music venues, and accessibility upgrades for both audiences and artists.

Other specific identified gaps are a midsize room for unamplified music, gallery and exhibit space, administrative base space, and improvement to existing outdoor spaces.

This context, together with our findings, suggests that in addition to the recognized facility and infrastructure gaps, in fact the long term success of the sector, realizing cultural vitality and maximizing public value, requires solutions beyond facility development. Based upon the research conducted throughout, these gaps reflect opportunities for the City to drive investment in public and private spaces, and in the context of purpose-built and adapted facilities. Solving for these gaps provides a framework for investments consistent with the City of Vancouver's mission and values, included on the following page, and sufficiently nuanced to address the serious challenges faced by the City's arts constituencies.

Although space needs vary between organizations and individuals, the greatest demand is space to live (as an individual or organization) and space to create.

Facility and Infrastructure Gaps

- Upgrades. Vancouver's facility inventory (particularly those operated by nonprofit entities) is in need of physical upgrades, including investments targeting improved physical accessibility; seismic and engineering enhancements; greening modifications and renovations. Upgrades for certain facilities may touch on all three areas, or one to two in combination. Updating cultural facilities consistent with existing City of Vancouver goals and priorities will benefit the arts community, and in turn drive public value for the entire city.

- **Signature Civic Arts Facilities.** While the current City inventory of cultural facilities is substantial, this collection requires continued and significant new investment. City-owned spaces could communicate the City's refreshed investments to arts and culture facilities, and should be evident in both large theatres and museums, and in small and medium spaces such as the Firehall Theatre. Pending the fundraising outcomes for the new Vancouver Art Gallery, this facility would be another important investment target. Planning Vanier Park cultural spaces needs to be undertaken in consultation with all key stakeholders including Real Estate and Facilities Management, Park Board, the Federal Government, and Musqueam, Squamish, and Tsleil-Waututh First Nations.
- **Development of Shared Spaces.** Co-located and/or multiuse hubs for administrative office, production activity, presentation and exhibitions, and cross-sector partnerships are needed to support Vancouver's arts and culture sector. Responding to the needs of organizations and individual artists captured in extensive surveys (see Figures 11 and 12), this gap reflects one of the most pressing challenges faced by Vancouver's arts sector constituencies—affordable, financially accessible real estate. Creating shared space, where operating efficiencies may benefit multiple users, is key to resolving this gap.
- **Production and Creative Spaces.** Studio, production, and rehearsal spaces are needed to sustain existing arts activity and to foster new opportunities for arts production and participation. This gap, while overlapping somewhat with shared spaces, prioritizes specific arts activities which are essential to sector and City cultural vitality. For example protecting and expanding industrial production space is a priority. While performance and presentation spaces are also important, the space to produce and create is critical to creating lasting public value through the arts. These spaces would serve both presentation needs and retail needs.
- **Spaces appropriate to First Nations and Indigenous cultural practices and presentation.** Consistent with the City of Reconciliation policies and plans, spaces intentionally planned, designed, built, and operated for First Nations and Indigenous use are paramount.
- **Artist housing and associated production space.** Artist social housing and co-ops are needed to alleviate the concerns raised by individual artists in extensive survey feedback. Stable, long-term leases, proximity to important material and networking resources, and physically safe places to live and create are paramount to a vital arts sector.
- **Outdoor concert venue.** Identifying and accessing large outdoor performance venues was cited as a significant challenge by artists and arts organizations. In their responses to survey instruments used in the study, more than half of all organizations said they had difficulty finding spaces that fit within their budgets. Adding to this, over 40% of organizations found it was 'difficult' or 'very difficult' to secure outdoor venues that met the technical requirements of their performances or events, and a similar number of organizations struggled to find outdoor venues in desirable locations. Creating one or more outdoor concert venues would meaningfully fill this gap and meet the needs described by arts organizations.

- Flexible event and performance space. Flexible co-located performance spaces, holding between 60 to 250 seats or attendees, are needed to foster improved connections between artists, arts organizations, and local Vancouver communities. Consistent with City values of responsiveness and learning, flexible event and performance spaces will accommodate the growing interest in more participatory forms of art-making and art consumption.
- Modern venues in the 60-250 range are needed to provide a place for smaller organizations to develop their work, build relationships with Vancouver’s diverse audiences, and build organizational capacity. Creating venues that fill this gap would balance the challenges associated with rising rents and those associated with aging or over-utilized spaces, easing the congestion of informal or ad hoc spaces. This would include space designed for music – particularly a hub of co-located presentation and production space that offers ancillary uses for revenue generation
- Small, shared gallery and exhibit spaces that cater to (and are accessible for) musicians and youth.
- Multiple mid-size venues, with capacity ranging from 250-800.

The identified facility and infrastructure gaps fall into two categories: inventory and control. Inventory gaps include the types of spaces that artists and organizations use and need, but do not have – studios and workspace; artist housing; gallery and exhibition space; flexible event and performance space; administrative space; and affordable rehearsal space. Artists and organizations may have space, or access to space, but little security in terms of their opportunities for long-term utilization.

Control gaps include a lack of “effective ownership” (long-term lease); ability to maintain or improve space; opportunity to drive ancillary earned revenue; and, for artists, a need for shared, multi-tenant space and determination over who will manage it; for organizations, the capacity to develop a philanthropic culture and diversified funding.

Capacity Gaps

As we identified facility and infrastructure gaps, AMS also found capacity gaps. These are gaps that may not be directly tied to facility ownership, development, or operation, but impact the ability of artists and arts organizations to be thriving, productive contributors to the City of Vancouver.

Broadly speaking, there is not enough organized advocacy with significant focus on City government, and that has a visible role in addressing concerns about space and other important sector needs. The Arts and Culture Policy Council (ACPC) is a notable exception, however, their role is somewhat constrained as they are a Council-appointed body. Considering how significantly many arts and culture stakeholders rely on municipal and government funds, support in the form of individual and private sector contributions is quite limited. This results in limited local capital and equity—a serious capacity gap.

Capacity (ecosystem) needs include:

- Leadership continuity and succession planning. Without the stabilizing forces of sustained real estate ownership and civic advocacy, organizational leaders are ill-equipped to develop and implement succession plans. This leaves arts organizations struggling when emergencies or natural career progression call an established leader away from their executive position.

- Leadership engagement and interaction. Artists and arts organizations need more formal and informal engagement with City of Vancouver staff and departments. Without opportunities to interact and build rapport with public officials and staff, arts constituencies will be unable to help create public value in ways that are consistent with existing City of Vancouver goals and priorities.
- Institutional development assistance and support, including mentorships. This refers to a lack of capacity-building philanthropic instruments, from both public and private sources, which would stabilize arts organizations and position them for growth and robust leadership.
- Convening forum. Arts and culture sector leaders lack a central forum to convene, collaborate, learn, and share best practices that are uniquely relevant to the City of Vancouver. While there are ad hoc efforts to create convening opportunities, support from a significant authorizer would lift the arts and culture sector and enable more consistent, significant exchange of information between constituents.
- More funding and support for those who operate spaces for the benefit of artists and arts organizations. The City needs consider ways to support entities that provide below-market space to artists and arts organizations. Currently, the City's non-capital, operating support funds are heavily weighted towards supporting arts and cultural programming, which inadvertently hinders the City's ability to support and incentivize organizations trying to provide affordable, shared space to artists.
- Advocacy. While there are provincial and municipal organizations charged with advising on policies that affect the arts and cultural sector, feedback received indicates that no central entity engages these constituencies effectively, with a focus on Vancouver's arts and cultural ecosystem. In combination with the challenges of having no convening forum, this means that artists and arts organizations are unable to bring their ideas for civic improvements and community-building to the right City departments and agencies—a loss for all beneficiaries.
- Development of philanthropy, particularly through Provincial and other government funding. A lack of Provincial and other public funding for the arts has hobbled the sector's ability to grow, constraining the capacity of artists and arts organizations to create public value and advance civic and community goals. Non-governmental philanthropy is needed to diversify contributed support. In order for more private sector giving to be encouraged, Vancouver's civic leadership should take advantage of their public role to foster a private philanthropic agenda.
- Development of partnership opportunities, including non-profit, for-profit, and government. Few models for cross-sector partnership currently exist, and it may be that this is due to a lack of incentives for such collaborative business models to form in the first place. By provoking more and more varied cross-sector collaborations, both the public and private sectors will tap into new resources, both in terms of market access and problem-solving resources. Deeply-rooted partnerships that bring together government, the non-profit world, and commercial enterprise can leverage the unique resources of all players to drive cultural vitality, benefiting the City and its many residents and visitors.
- Property control and equity opportunity. A lack of opportunities for artists and arts organizations to secure long-term leases or full ownership of real estate is a significant gap. Without these opportunities, arts constituencies are unable to expand their work in other ways; starved of assets that would enable growth and stabilization, they may struggle to remain at the status quo. Resolving this through new property ownership and equity-building instruments will be key to successfully driving public value through the arts sector.

The City can address these capacity needs by expanding its investment, direct and indirect, in the development of organizations and artists. By helping arts leaders with board development and training, with staff development and succession planning, with developing sound financial strategies, and by working with partners on issues of facility ownership and organizational advancement, Vancouver can move towards closing these capacity gaps. In doing so, the arts and culture sector and its many partners, participants, and other important stakeholders will be able to cohere more effectively and advance the City of Vancouver's priorities.

Civic Policy & Positioning Gaps

Based on all the inputs received, AMS also identified policy-based gaps. These findings align with the facility and infrastructure gaps noted earlier, and were a critical input in the development of the criteria for decision-making described in the following section.

Civic policy/positioning (enabling factors) needs include:

- Repositioning arts as a public value in City decision-making. The arts and culture are not currently visible in City-driven decision-making. Integrating the arts—through engagement with sector leaders, for example—in important City decision-making processes would be one solution.
- Artists and arts organizations need the City to clarify the distinctions between its role and influence as a landlord and as an enabler of arts activity. The practices associated with operating arts and culture spaces, and managing tenants within those spaces, are perceived to be at odds with the City's agenda as an enabler of arts and culture sector advancement. Setting rents and codifying certain programs is perceived to be in conflict with the

stated City goal of supporting and encouraging a thriving arts and culture scene.

- Transparency of the civic decision making process. There is a sense that civic decision-making lacks transparency, with information distributed to many authorizers and difficult to synthesize.
- Align or address regulations that inadvertently hinder arts and cultural activity. Zoning, permits, and local bylaws that curb or do not adequately fulfill the intention of supporting arts and cultural activity are challenges that the City is empowered to address. While noise bylaws, for example, may not be intended to restrict arts and cultural activity, such may be the result. Creative problem-solving that protects arts and culture activities from these unintended consequences of regulations would reduce or eliminate this gap.
- Preservation of arts and culture spaces: production spaces, music and performance, living, cultural heritage, and industrial land use. It is important for the City to prioritize the preservation of arts and culture spaces, including production spaces, music and performance venues, spaces that hold or foster specific cultural heritage traditions, intangible cultural assets and industrial land use for at production and other industrial uses. The present gap in preservation efforts may risk spaces that are sorely needed, heavily utilized by certain constituencies, or uniquely suited to engaging underserved populations.
- Align City-wide strategy for arts and culture with Housing strategy, as well as Social Services and other public agencies and partners. Consistent with the feedback from individual artists that was gathered through surveys and in-depth interviews, there is a need to continue to align efforts across the City departments serving arts and culture, and the departments advancing housing goals. Artists' needs for financially accessible, safe, code-compliant places to live and create may be addressed through

collaborative strategies that leverage the expertise of other public entities.

- More flexibility for Community Amenity Contributions (CACs) to support City-wide arts and culture organizations. Akin to the regulatory challenges described earlier, CACs presently lack the freedom to support large-scale arts and culture efforts through cash grants or in areas beyond major redevelopment projects to support local NPO/Co-op ownership to secure spaces
- Integration of arts and culture spaces in City, Park Board, and private spaces (i.e. community centres, neighbourhood houses, housing, places of worship). In the current landscape, arts and culture venues are too often viewed as separate and apart from other civic facilities and institutions. It is crucial to integrate arts facilities, and therefore arts experiences, with other parts of civic life to embrace the creation of public value through the arts.
- Support the application of City of Reconciliation and Equity, Diversity, and Inclusion lens on decision-making and priorities. In the interest of integrating the arts and civic life and decision-making, the City of Reconciliation and Equity, Diversity, and Inclusion priorities should be woven into arts-focused decisions made or facilitated by the City. At present, First Nations, Indigenous, people of color, and other historically under-served or under-represented groups are not fully a part of City decision-making as it relates to the arts and culture sector. By bringing these lenses to bear, stakeholders from these important communities will be able to command an appropriate level of influence in civic decision-making.

Overall, the data make clear that Vancouver's arts and culture sector is poised to drive real public value—provided the City engages and supports the sector with focused intent. In the final section of our report, we build on the framework to develop an

approach to considering investment in arts and culture, in the context of public value.

By repositioning the arts and culture sector as a key driver of City and neighbourhood identity, a source of civic pride, a visitation catalyst, and an attractor of a creative workforce—in sum, to drive success—the arts and culture sector should be recognized as a key contributor to public value.

This approach is consistent with the overall civic mission to create a great city with opportunities to live, work, and prosper.

VIII. Summary of Key Priorities

Infrastructure, capacity, and policy gaps touch on nearly every aspect of civic life and City effort in the arts and culture sector. In order to support a focused response to arts and culture sector needs, AMS has consolidated the findings detailed in the previous section under the three broad thematic areas, below. This consolidation provides the basis for the City to prioritize gaps for urgent attention.

Facility and Infrastructure

- Upgrades to existing facilities. Covering investments in City-owned and private spaces, filling this gap successfully would include needed updates in facilities that, while well-utilized, are aging, unsafe, or so a great extent unsuitable for today's arts and culture activities.
- New spaces for artists and cultural organizations to live and create. Touching on housing, studio and production space, and the development of shared spaces, filling this gap successfully would provide new and financially accessible real estate to artists and organizations in the sector.
- Flexible spaces that enable arts and culture sector evolution. Responding to the natural growth and change in how people and organizations make art and culture, successfully filling this gap would include creating performance and production spaces that can conform to artists' and arts organizations' aspirations.
- Spaces appropriate to First Nations and Indigenous cultural practices and presentation. A critical element of advancing the City of Reconciliation, making these spaces

will rightly honor and welcome these historically underserved constituencies.

Capacity

- Leadership development. These gaps touch on both leadership training and the important organizational work of succession planning. Part and parcel with these efforts, leadership engagement strategies that build a "thick" network of leadership who can develop and share best practices and lessons learned will be an invaluable asset, particularly if this networking component connects leaders within and far beyond the arts and culture sector—with the City leadership, philanthropic leaders, and leaders in other private sector industries.
- Development of robust philanthropic and advocacy supports. Leveraging City, Provincial, Federal and private sector tools, these gaps refer to opportunities for philanthropic agents to provide important support for arts and culture constituencies, ranging from facility operators to artist entrepreneurs with unique capacity-building needs. Resolving these gaps calls for a coordinated response to arts and culture sector needs by advocates, civic leaders, and philanthropists, using tools such as long-term leases, equity-building opportunities, and more.
- Cross sector relationship building. Closely tied to leadership development, and reflecting increasingly popular and meaningful practices throughout the sector in North American cities, these gaps hinge on building robust connections to industries outside the arts and culture sector, through programming, investments, and learning opportunities, among other channels. By 'entangling' the

arts and culture sector with other fields, the sector becomes even more of an asset to its community, and engages new opportunities for organizational growth and learning.

Each of the summary categories of gaps above merits focused attention.

Civic policy

- Enable arts and culture *practices*. By addressing policies and regulations that constrain arts and culture activity, both within individual facilities and at the neighbourhood level, the City of Vancouver can resolve gaps that artificially limit arts and cultural growth.
- Integrate City-wide strategies for housing with arts and culture sector goals, enabling space for sector practice, as well integrating arts and culture spaces into other City-authorized and private development.
- Include arts and culture leaders in policy making. Successfully resolving these gaps would include creating opportunities for artists and arts organization leaders to be informed in the civic decision making process. Likewise, it necessitates integrating the City of Reconciliation and Equity, Diversity, and Inclusion lens on civic decision-making, ensuring a place at the table for people representing a diversity of arts and culture disciplines, capacities, and goals.
- Broaden investments to drive public value through arts and culture. Expanding the flexibility of existing support instruments, such as CACs, and taking a more proactive approach as an enabler rather than assessor of arts activity in City-operated spaces, will position the City to embrace the arts and culture sector as a public value of Vancouver rather than just a commodity.

In Conclusion

Based on feedback received from the City of Vancouver, and through a process of identifying urgent foundational investments to drive the creation of public value, AMS arrived at the following prioritization of gap areas. The priorities build on each other, creating a virtuous process. For example, by investing first in spaces for First Nations and Indigenous cultural practices and presentation, the City of Vancouver turn a new leaf in serving these important populations. Building on that accomplishment, the City can then expand its investment to new spaces for cultural stakeholders to live and create, drawing an ever-wider circle around the communities and cultural traditions supported by City investment.

In prioritizing leadership development, the City can embrace the talents and ambitions of arts and cultural leaders, and lay the groundwork for deeper, more wide-reaching connectivity between arts and culture and Vancouver's other business sectors. Investing in people first will enable the growth of a dense network of thinkers, leaders, professionals, and supporters—a rich ecosystem for creativity and collaboration to flourish, from which the development of philanthropic and advocacy-focused supports is a natural outflow.

By making room for arts practitioners in civic process and policy creation, the City can leverage its arts practitioners to support sector-specific ends and other public priorities. With arts practitioners integrated into the policy process, it will be possible to make room for arts and cultural practice itself, and a logical consequence of this in turn will be that instrumental support for driving public value through the arts is broadened and expanded.

We recognize that the work of the Cultural Services is to evaluate specific projects, and to ensure these projects advance either capital

or long-range planning approaches to investment. To facilitate this effort, based on our research and findings, we have developed a set of indicators in Appendix 7. These indicators can be applied to the criteria to enable project-specific evaluation. This builds on the work that the Cultural Services already undertakes, shifting the focus toward public value as the ultimate criterion for investment.

FACILITY AND INFRASTRUCTURE

1. Spaces for First Nations and Indigenous cultural practices and presentation
2. New spaces for cultural stakeholders to live and create
3. Flexible spaces that enable arts and culture sector evolution
4. Upgrades to existing facilities

CAPACITY

1. Leadership development
2. Cross sector relationship building
3. Development of robust philanthropic and advocacy supports

CIVIC POLICY

1. Make room for arts and culture practitioners
2. Make room for arts and culture practices
3. Broaden instrumental support to drive public value through arts and culture

Table 1: Prioritization of Gaps

List of Appendices

Appendix 1: Making Space for Art Survey Analysis

Appendix 2: Vancouver Survey Instrument

Appendix 3: Trends and Exemplar Research report

Appendix 4: Demographic Scan report

Appendix 5: Performing Arts Gap Analysis

Appendix 6: Performing Arts Gap Survey report

Appendix 7: Evaluation and Indicators

Appendix I: Making Space for Art Survey Analysis



Cultural Spaces Survey Process

Cultural Spaces Survey

- * **Objective:** Obtain input from non-profit arts and cultural organizations and individual artists to understand current and future programming activity, space use, and facility needs to help inform ways to best support arts and cultural spaces in Vancouver.
- * **Distribution:** Over 400 City cultural grantee organizations directly emailed & Cultural Services list serve and circulated virally.
- * **Duration:** 4 weeks (31 January – 28 February 2017).
- * **Responses:** 287 respondents who reported on 388 cultural spaces

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Profile of Respondents

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Industries

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More individuals responded than organizations

119 organizations and 168 individuals artists responded.

Are you completing this survey on behalf of an organization?

Yes
41%

No
59%

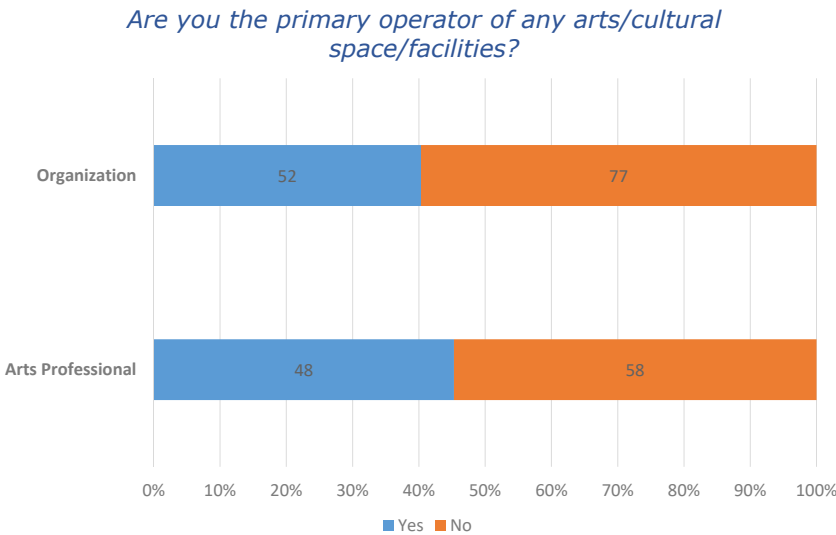
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2

Primary Operator

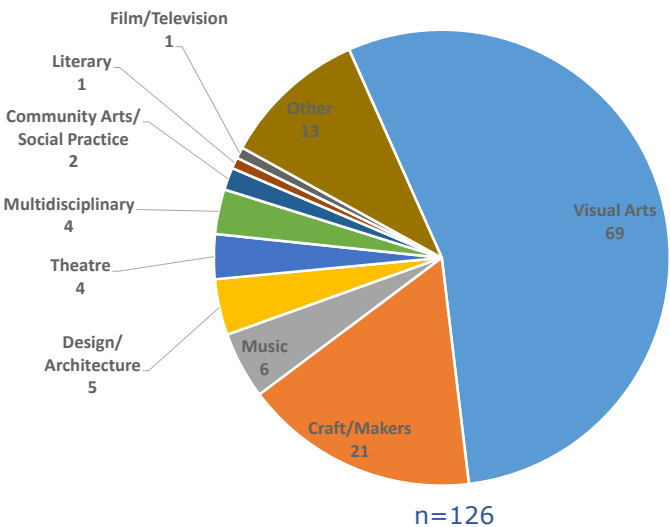
- Just under half of all organizations are the primary operator of facility
- Nearly 40% of arts professionals (individual artists) reported being a primary operator of a facility



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Over half (54%) of individual respondents are visual artists

Please select the primary art practice you work in. . .

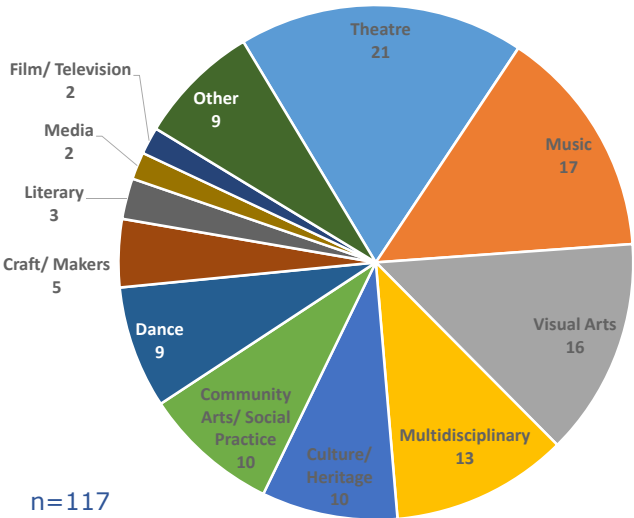


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Organizational respondents mixed

Please select the primary art practice your organization works in. . .

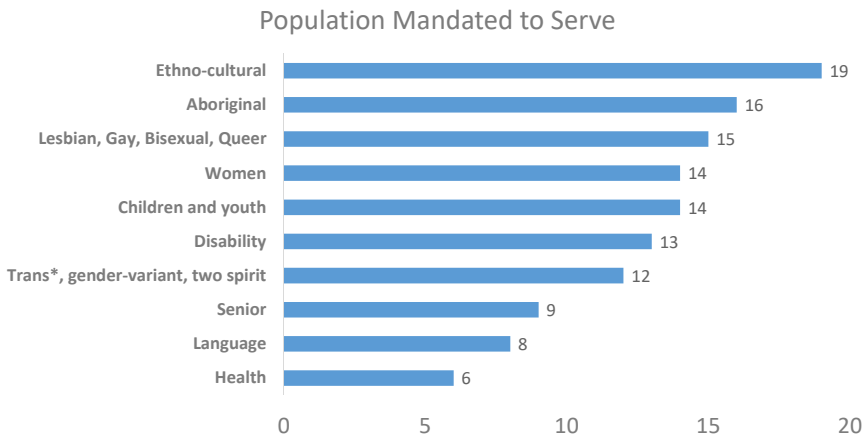
47 (40%) are performing arts organizations (music/theatre/dance).



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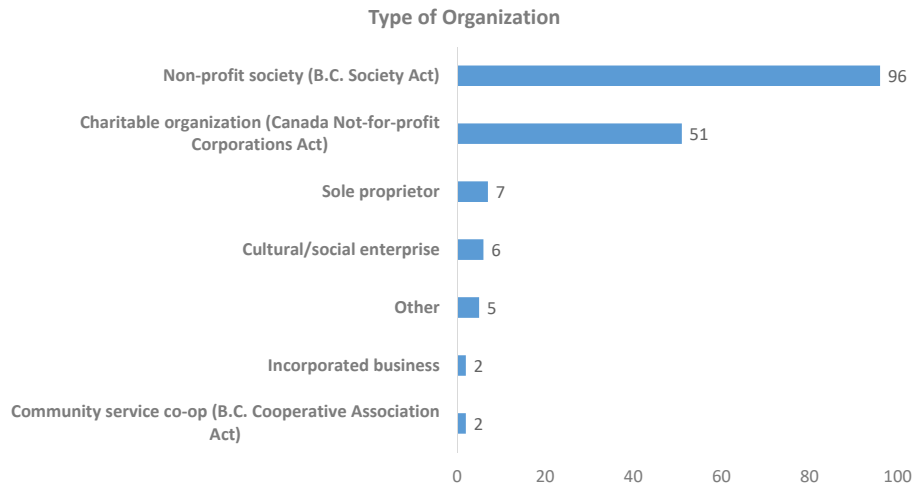
43 organization mandated to serve specific populations

Which specific communities or populations is your organization mandated to serve?



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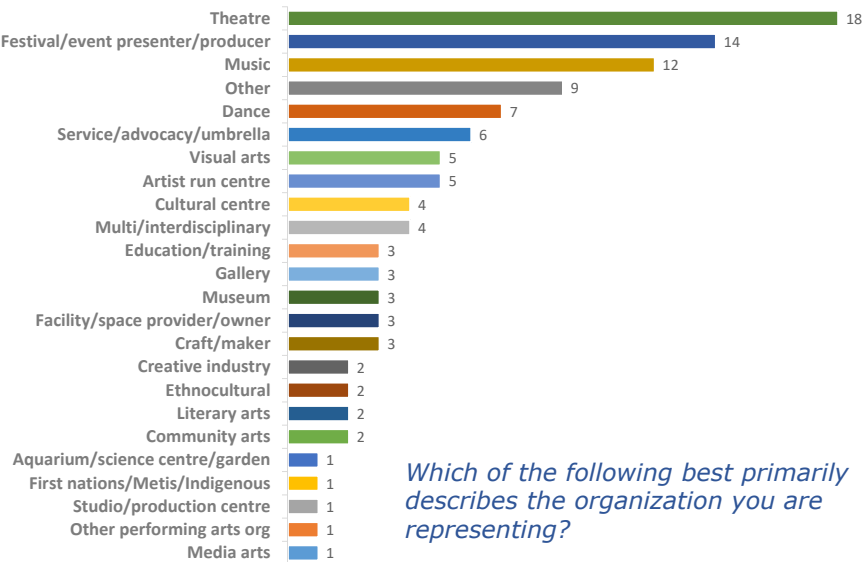
Most organizations incorporated as non-profits



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Performing arts organizations account for a third of all organizational respondents

38 of 112 (33%) of organizational respondents primarily describe themselves as performing arts organizations (theatre, music, dance, other).



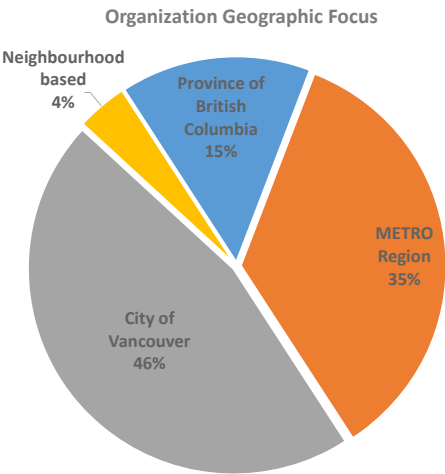
Which of the following best primarily describes the organization you are representing?

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Over 80% of organizations focus service on greater Vancouver area

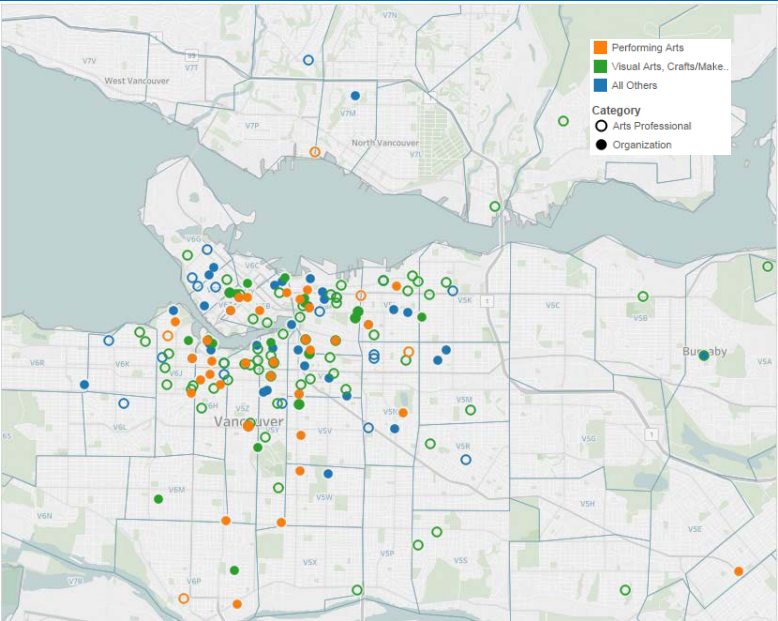
What is the geographic focus of your organization? Do you primarily serve the province, metro Vancouver, the City or are you more neighbourhood focused?

50% of organizations report geographic focus on the City of Vancouver or specific neighborhoods.



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Organizations more geographically concentrated than individuals



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77% of organizations operate on small budgets

- The vast majority of respondents are organizations with budgets under \$500k.
- Of the 78 organizations with budgets under \$500k, **44 have budgets under \$100k.**

BUDGET COHORTS		
Small	Under \$500k	78
Medium	\$500k to \$999k	12
Large	\$1M to \$8.99M	7
X-Large	\$9M or more	4
Number of respondents (N)		101

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Note: 11 responding organizations did not provide a budget amount

Key Findings – *Profile of Respondents*

- ✳ Individual respondents are predominately visual artists
- ✳ One third of organizational respondents are performing arts groups
- ✳ Respondents are mostly from core neighborhoods within City limits and concentrated in or near the downtown area
- ✳ Over three quarters of organizational respondents have annual budgets under \$500,000; many have budgets under \$100,000

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Current Spaces

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Performing Arts Facilities/Spaces

- Theatre facilities represent more than 150,000 square feet of space used by performing arts organizations.
- The minimum and maximum square footage suggests there are significant differences within and across facility types.

List any arts/cultural facilities/spaces you or your organization uses and/or operates.

Facility type	Total sq ft	Number of spaces	Average sq ft	Min sq ft	Max sq ft
Theatre	152,626	25	6,105	750	33,005
Music venue / concert hall	34,950	10	3,495	450	10,000
Outdoor plaza / park / bandshell	39,059	5	7,812	3,059	20,000
Flexible / other performance	45,430	15	3,029	40	10,000
Rehearsal	67,711	26	2,604	400	25,600
TOTAL	339,776	81		↑	↑

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Visual Arts Facilities/Spaces

- Galleries (n=14) account for nearly 200,000 square feet of visual arts facilities.
- However, VAG accounts for over 172,000 of this, leaving 26,000 square feet between the remaining 13 reported gallery spaces
- Galleries and Artist studios reflect a wide range of square footage between venues.

List any arts/cultural facilities/spaces you or your organization uses and/or operates.

Facility type	Total sq ft	Number of spaces	Average sq ft	Min sq ft	Max sq ft
Gallery	198,636	14	14,188	750	172,320
Museum	5,141	2	2,571	1,641	3,500
Artist studios/workshop	174,235	28	6,223	600	24,000
Residential (artist live/work studio/housing)	4,130	4	1,033	400	2,000
TOTAL	382,142	48		↑	↑

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Media, office, & storage spaces

Organizations utilize 36,000 square feet of storage/archive/collection facilities.

“Other” spaces include:

- Science World (132k sq ft)
- PL1422
- La terraza
- Nikkei Centre
- The Studio at Creative Coworkers
- Dr. Sun Yat-Sen Chinese Classical Garden
- Polish Veteran's Association
- Centre culturel francophone de Vancouver

List any arts/cultural facilities/spaces you or your organization uses and/or operates.

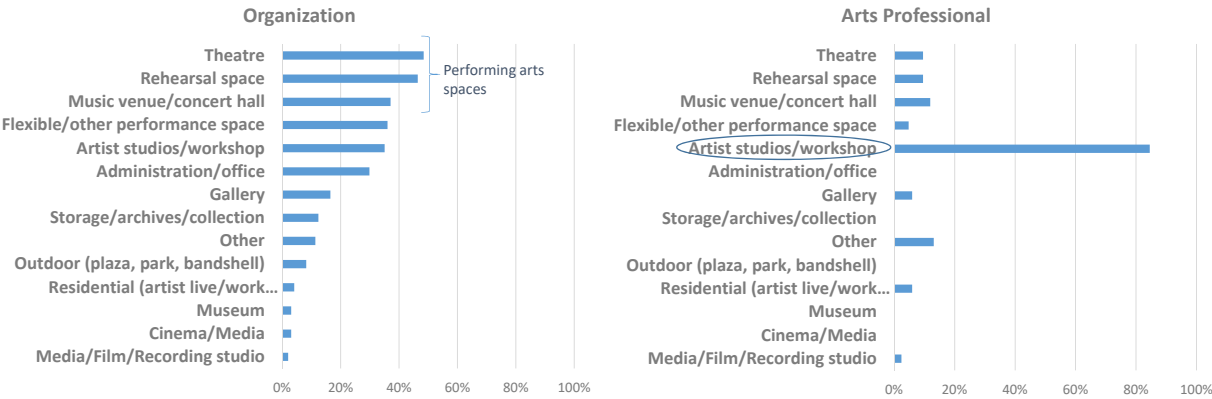
Facility type	Total sq ft	Number of spaces	Average sq ft	Min sq ft	Max sq ft
Cinema/Media	15,700	3	5,233	700	10,000
Media/Film/Recording studio	150	1	150	150	150
Administration/office	18,972	21	903	75	4,000
Storage/archives/collection	36,060	9	4,007	30	25,000
Other	156,087	8	19,511	500	132,350
TOTAL	226,969	42			

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Types of spaces occupied reflects mix of respondents

Organizations report high occupancy of performing arts spaces. Individuals mostly occupy studios and workshops.

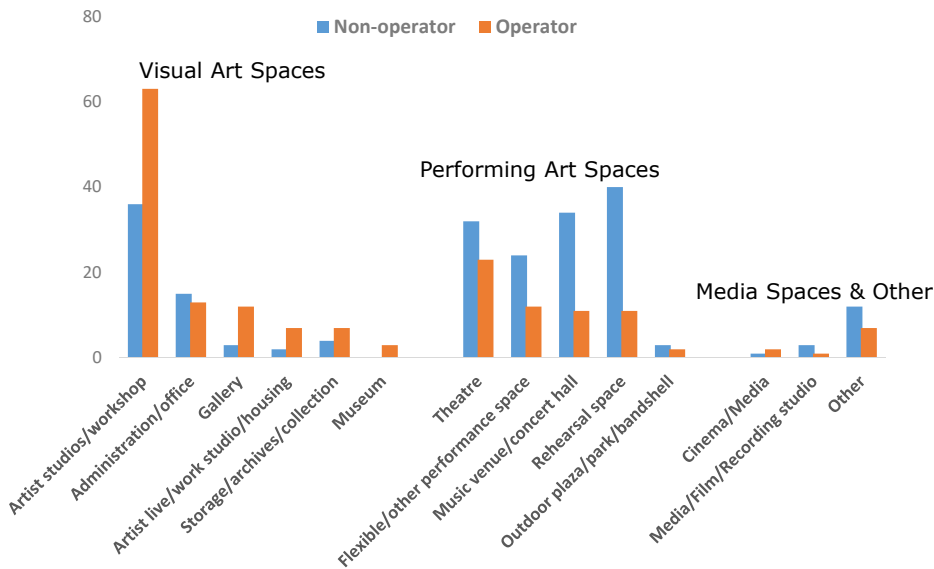
List any arts/cultural facilities/spaces you or your organization uses and/or operates.



20 © 2016 AMS Planning & Research

Space operators concentrated on studios & theatres

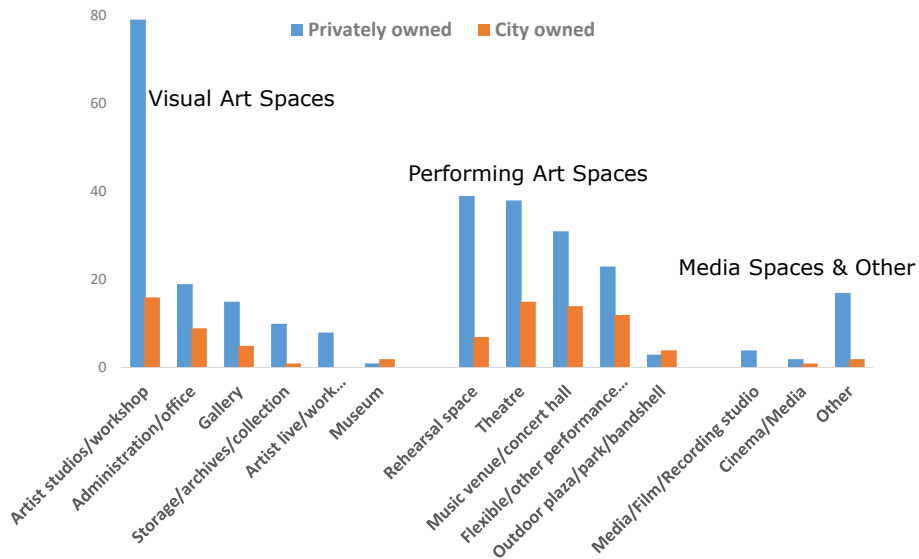
- Performance spaces are more likely to be utilized by non-operators.
- Artist studios, workshops and housing are likely to be occupied by the operator of the space.



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The City owns relatively low percentage of utilized cultural spaces in Vancouver

- Spaces utilized by respondents are more likely to be privately owned.
- There is a higher number of performing arts spaces that are city owned, but they still reflect a minority of all spaces occupied by respondents.

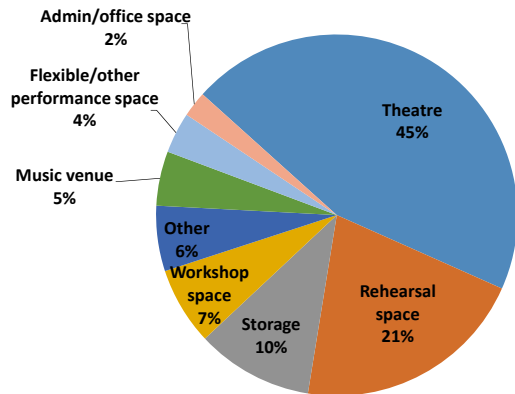


22 © 2016 AMS Planning & Research

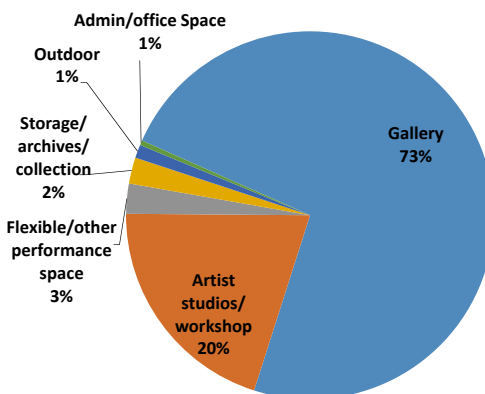
Percentage of square feet dedicated to various uses – organization data only

Majority of performing arts space is for performances and rehearsals. Nearly three-quarters of visual arts space is gallery space. (due to VAG)

Performing Arts Spaces – Square Footage Allocation



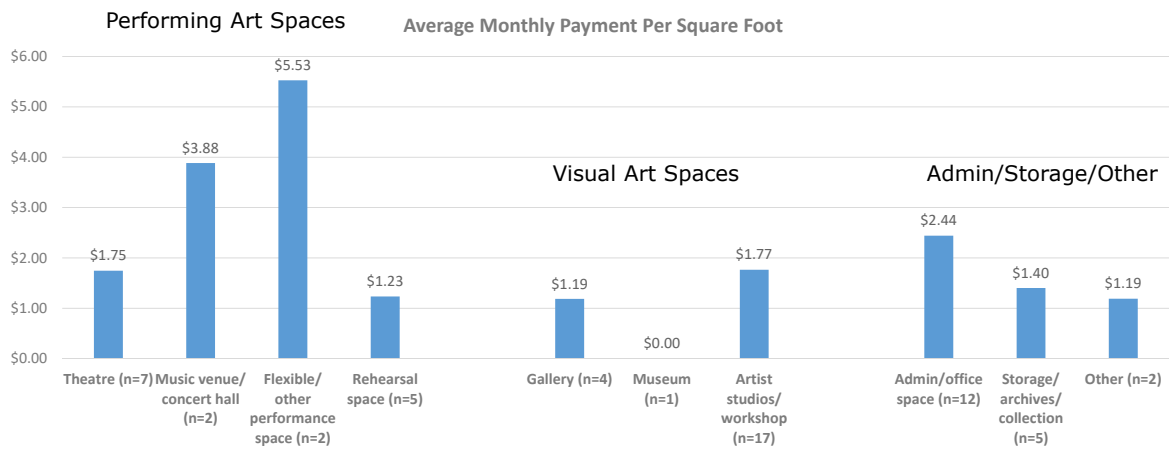
Visual Arts Spaces – Square Footage Allocation



23 © 2016 AMS Planning & Research

Average monthly rent for creative space in Vancouver is \$1.98 per square foot (\$23.76/year/sq.ft.)

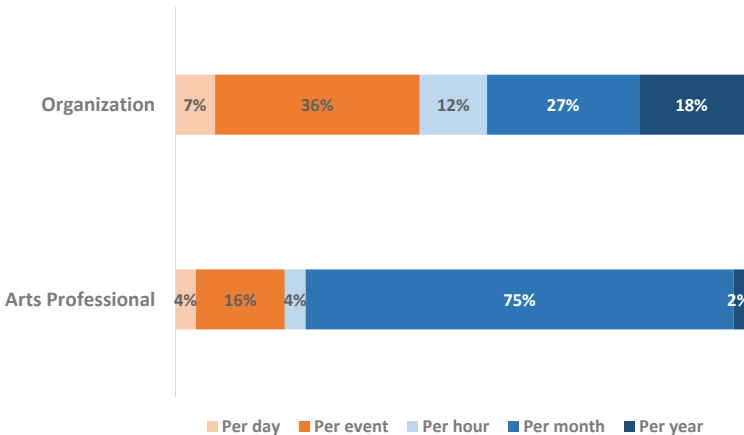
Most average monthly payments for spaces occupied on a full-time basis by organizations range between \$1.19 and \$2.44 per square foot, with higher averages for certain performing arts facilities and administrative space.



24 © 2016 AMS Planning & Research

75% of individual artists pay rent on monthly basis

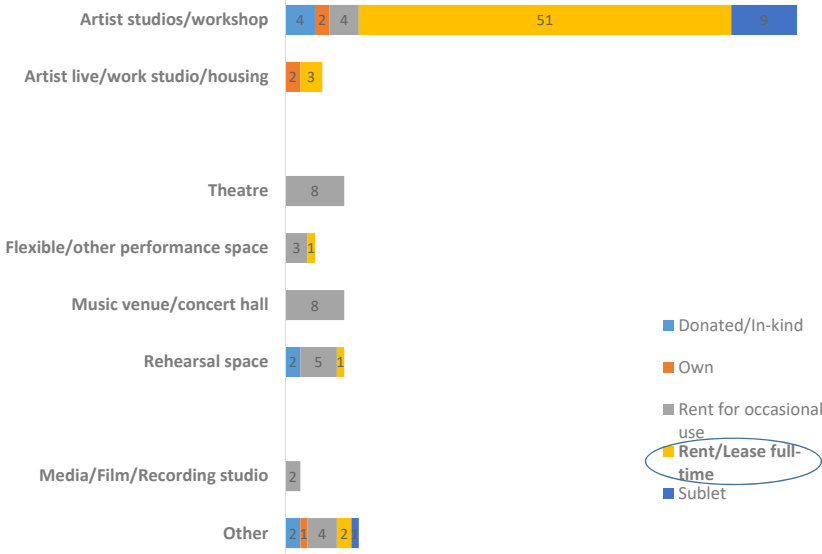
- Organizations are more likely to pay for space on a per event or yearly basis.
- Most individual arts professionals pay for use of facilities on a monthly payment schedule.



25 © 2016 AMS Planning & Research

Individual artists mainly rent studio space

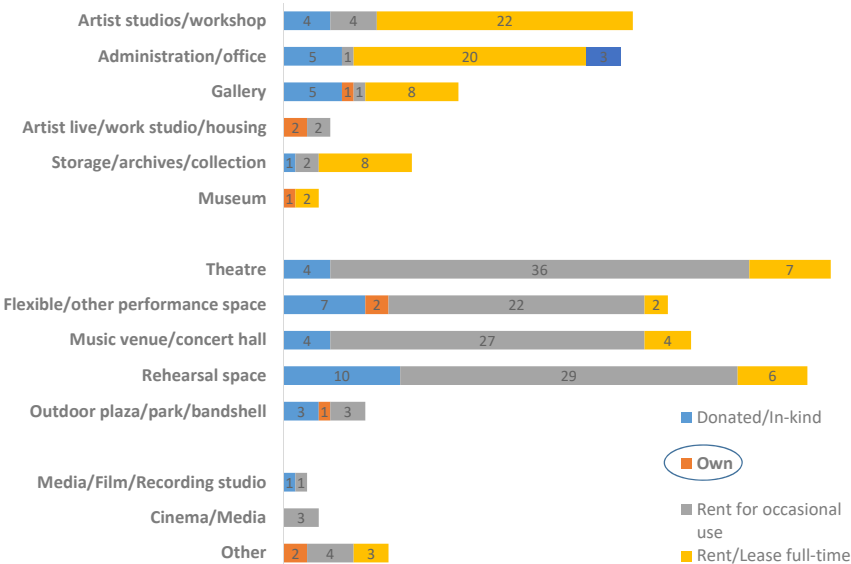
The majority of artist studios and workshops are rented or leased on a full-time basis.



26 © 2016 AMS Planning & Research

Very few organizations own their spaces

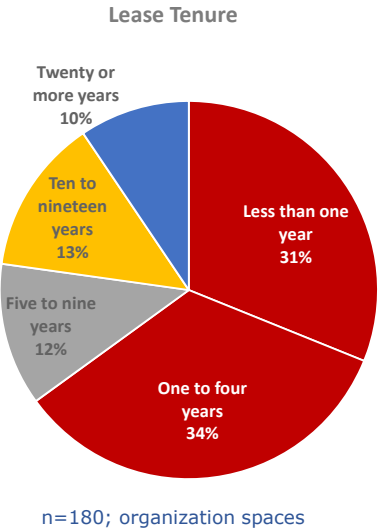
The majority of performing arts spaces are rented for occasional use, while visual arts spaces are more likely to be rented/leased on a full-time basis.



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Nearly one-third of full-time spaces are in monthly/yearly leases lasting less than one year

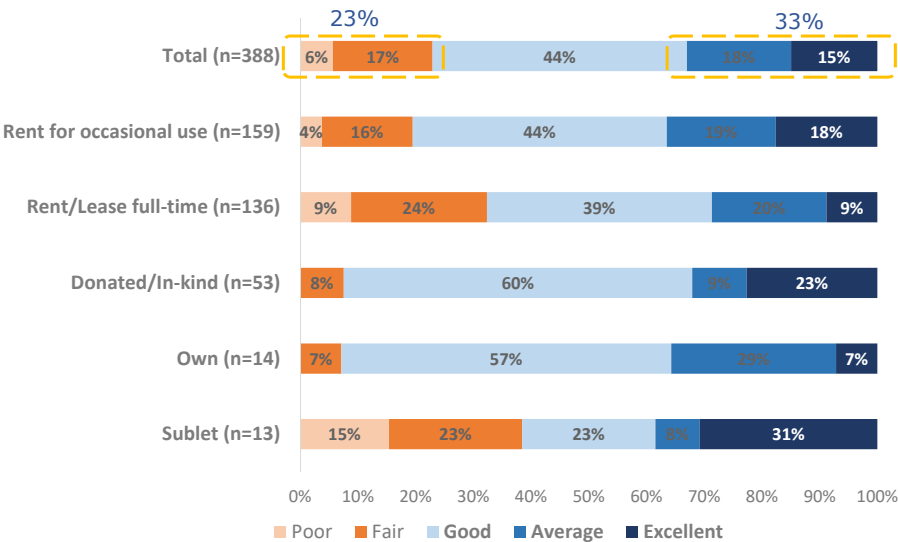
Two-thirds are in leases lasting less than 5 years for their full-time occupied spaces.



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77% of facilities are in 'good' or better condition

- One-third of spaces reported being in *average* or *excellent* condition. While 23% reported *fair* or *poor* condition.
- Rented and sublet facilities were more likely to be in *fair* or *poor* condition.

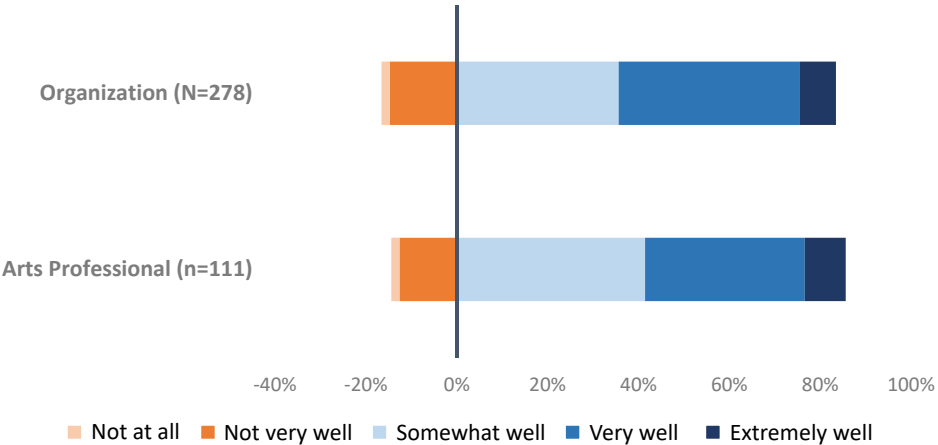


29 © 2016 AMS Planning & Research

Current spaces are meeting needs

The majority of spaces are meeting the needs of respondents at least somewhat well.

How well does your current space meet your needs?

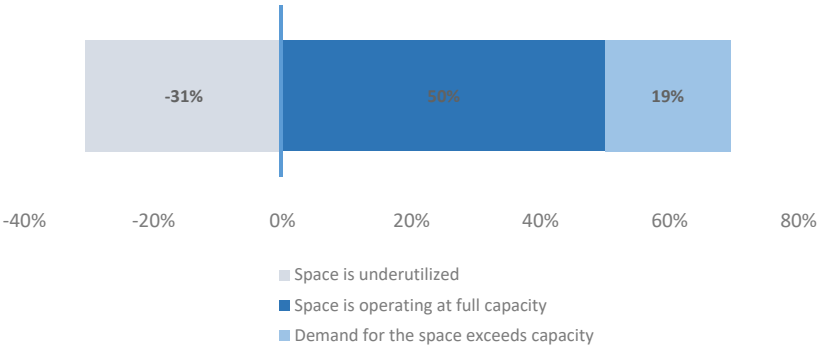


30 © 2016 AMS Planning & Research

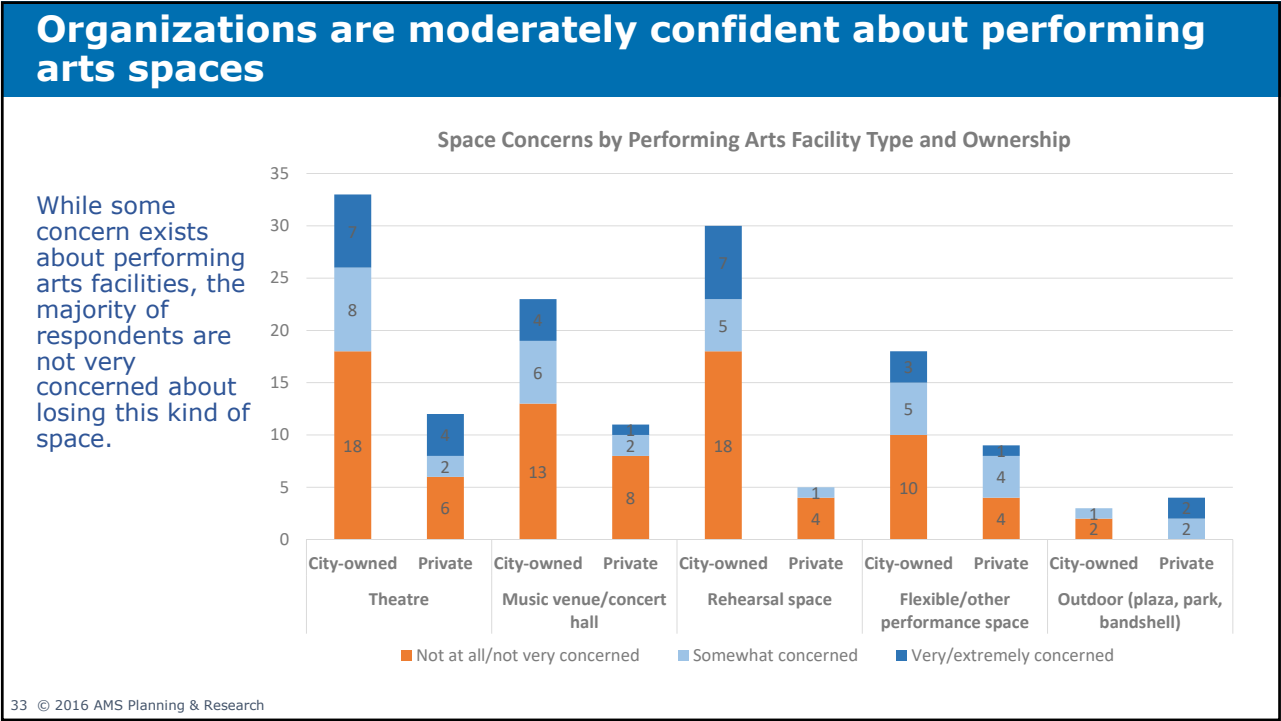
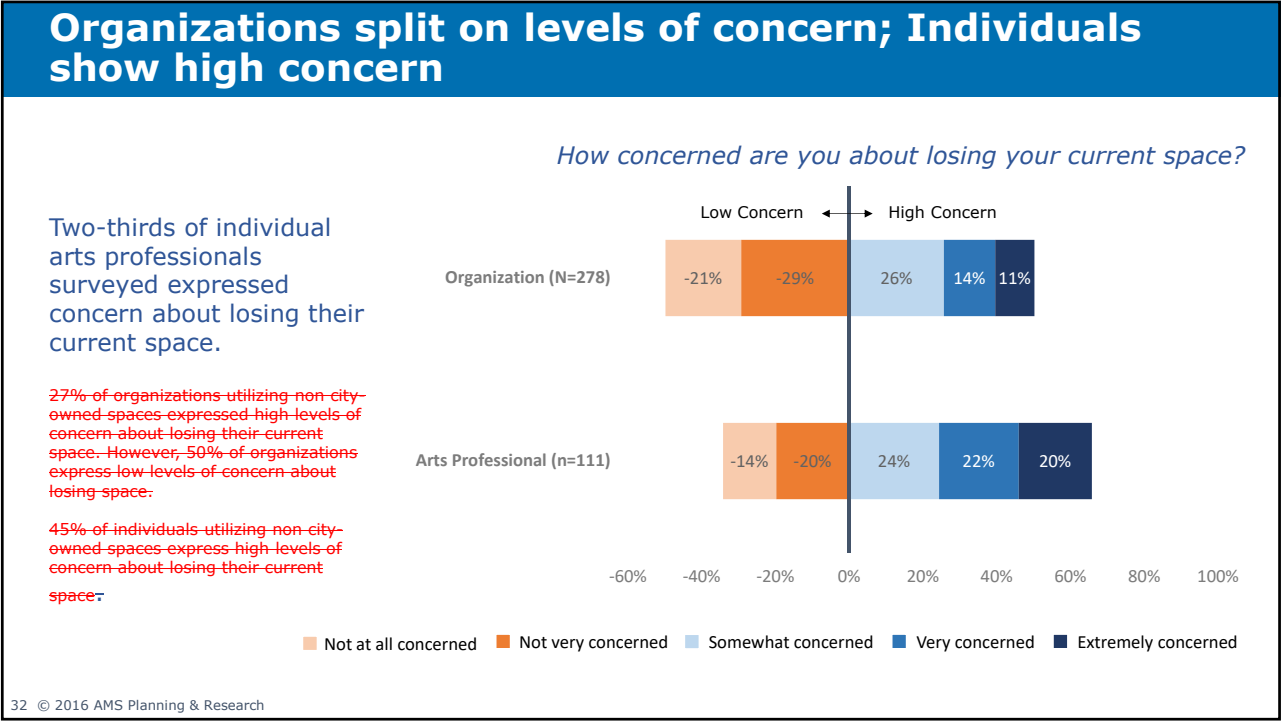
Most organizations are running spaces at full capacity

- Most facilities cited by organizations are operating at full capacity or have a demand that exceeds capacity.
- However, 31% report having availability.

How would you describe the utilization of your space?

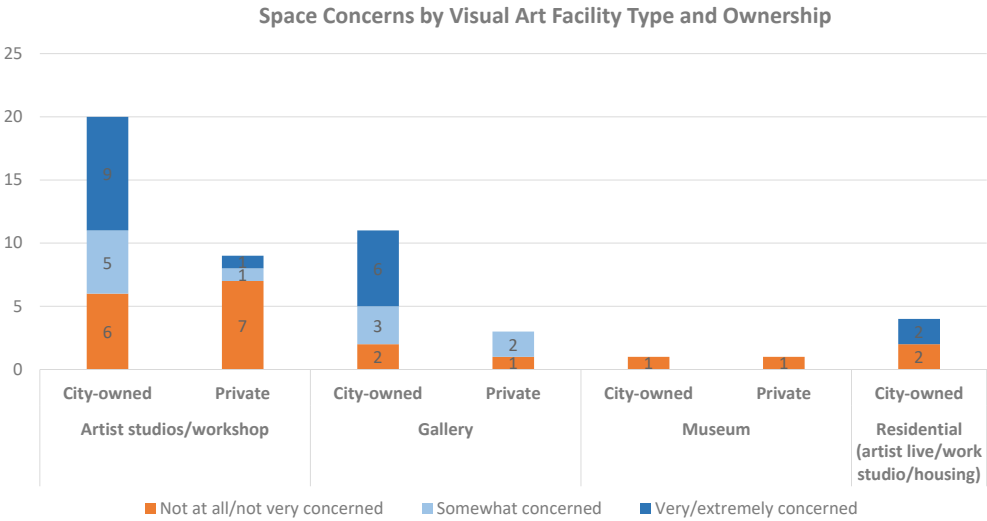


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Organizations express highest concern about studio & workshop spaces

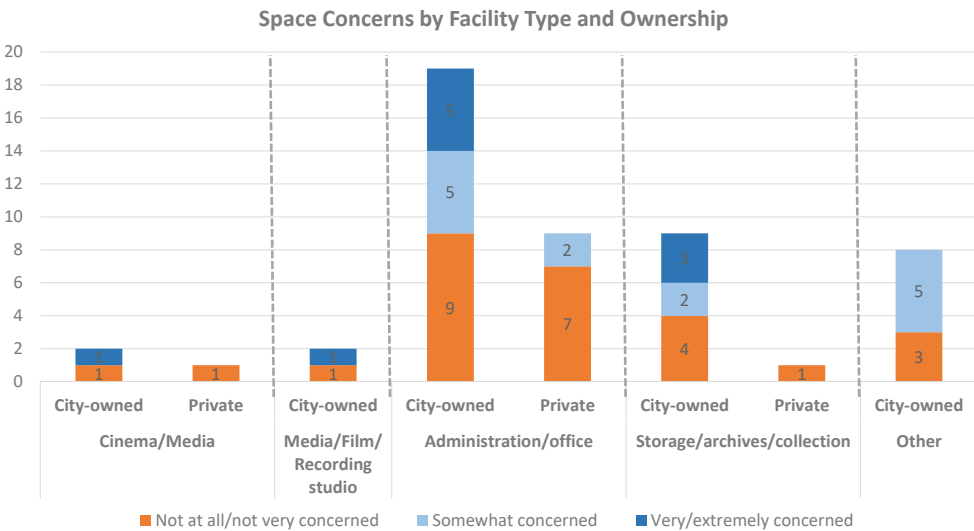
There appears to be more concern among visual arts organizations regarding facility retention.



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Some concern exists about admin space

There is concern among 12 organizations regarding retention of administrative space.

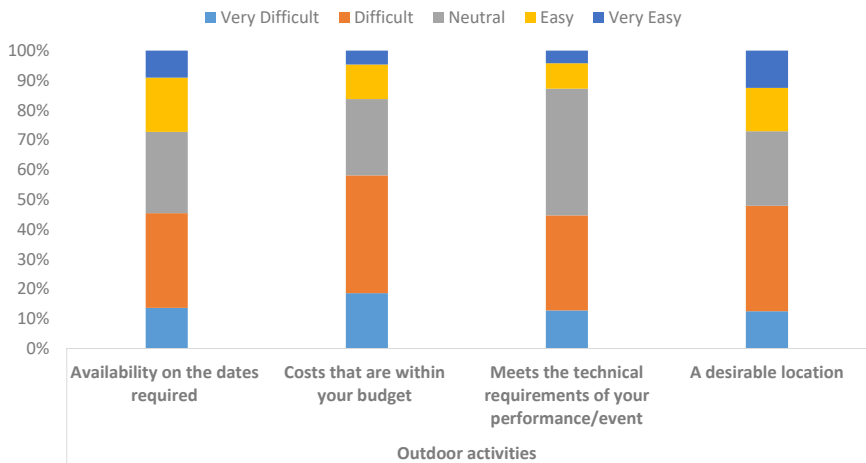


35 © 2016 AMS Planning & Research

Organizations have difficulty finding suitable outdoor spaces for events

When planning events, festivals, or public gatherings in the City of Vancouver, how easy is it to find and book a suitable space that meets the following criteria?

- More than half of all respondents say finding spaces that fit within an organization's budget is difficult.
- Very few state that finding space is "easy" or "very easy".

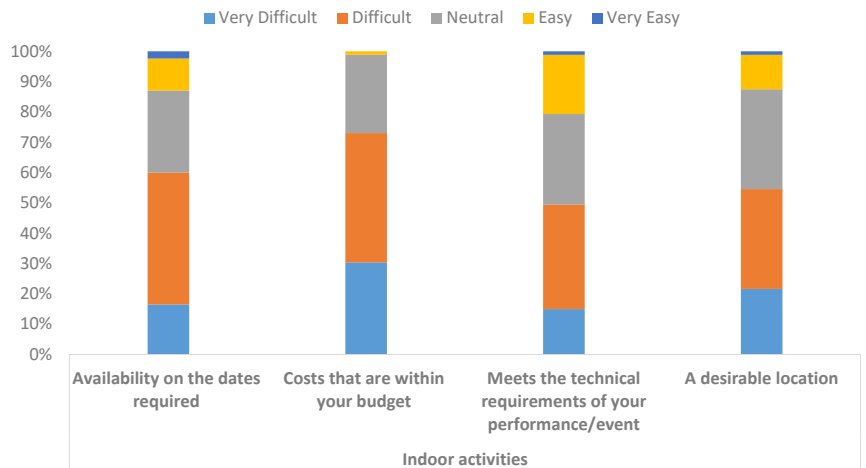


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Organizations find it even more difficult to find suitable indoor spaces

When planning events, festivals, or public gatherings in the City of Vancouver, how easy is it to find and book a suitable space that meets the following criteria?

More than half of all respondents say finding spaces that fit within an organization's budget is difficult.

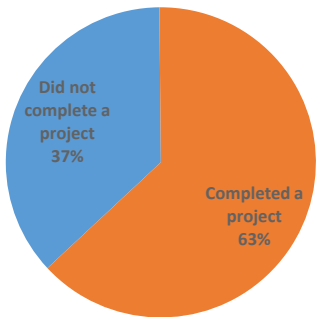


37 © 2016 AMS Planning & Research

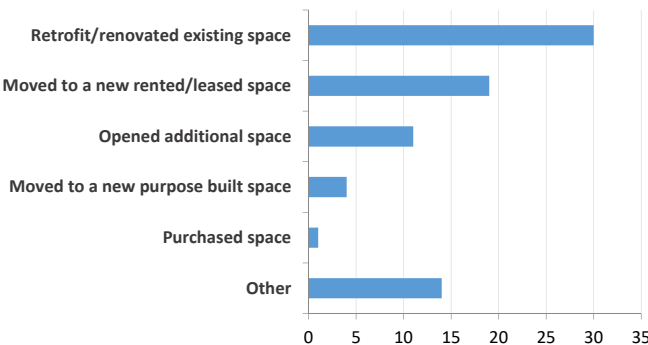
Most have completed a project since 2008

Two-thirds of respondents stated having completed a space project.
Of those, most report moving or renovating an existing space.

Have you completed a project since 2008?



Type of Project Done Since 2008



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Key Findings – *Current Space Situation*

- ✳ Average monthly rent for creative space is \$1.98 per square foot
- ✳ Square footage of spaces ranges from over 100k to small studios
- ✳ Most full-time occupied spaces are leased with tenure of less than 5 years; one-third of leases are year-to-year or month-to-month
- ✳ Most feel spaces are in Average to Excellent condition
- ✳ Level of concern about losing space is mixed; highest levels of concern exists regarding studio and workshop spaces

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Future Needs

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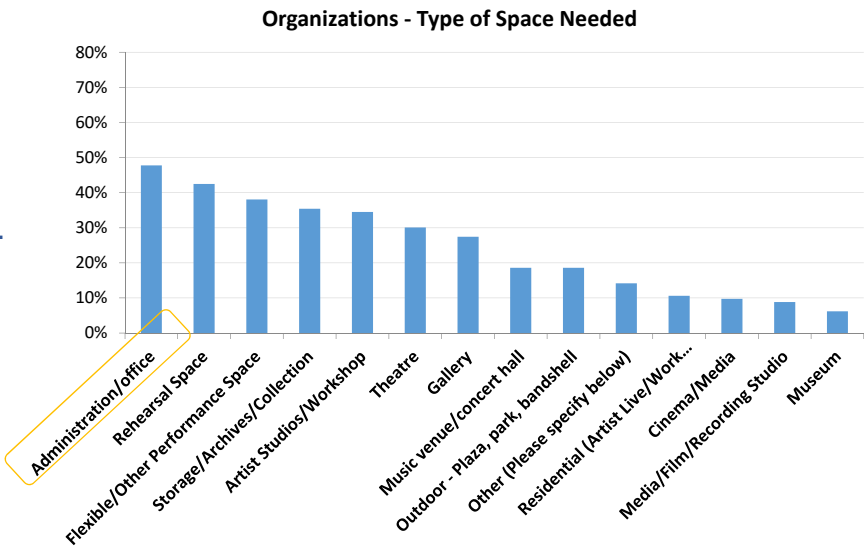
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Industries

40



Organizations expressed need for office & rehearsal space

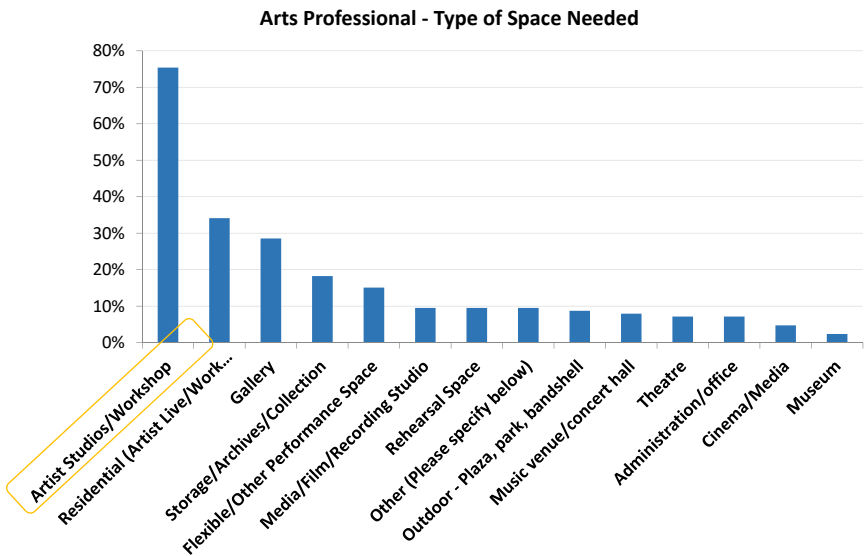
- Organizations are seeking **office space, rehearsal and flexible performance space, and storage.**
- Nearly a third expressed interest in theatre space.
- Performing arts needs match previous survey.



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Individual artists seeking studio, production, gallery space

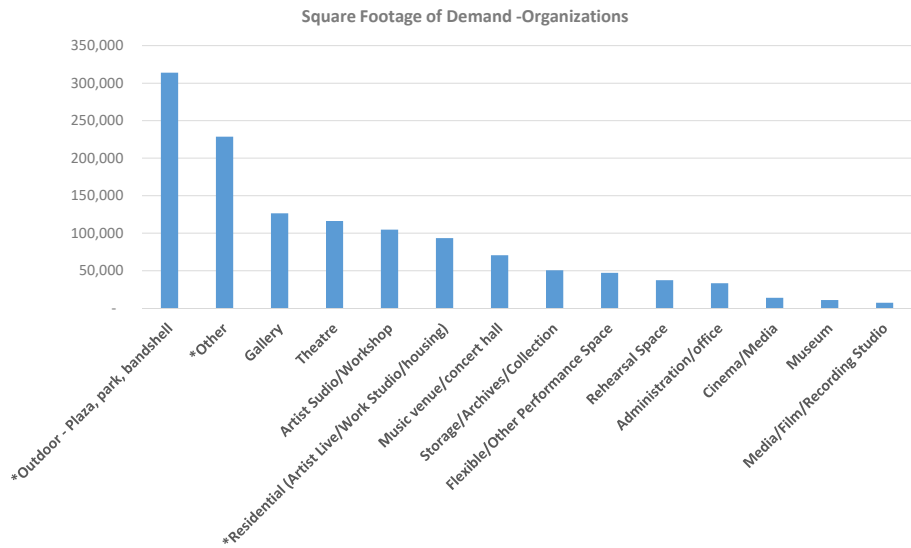
- Highest interest/demand from individual artists is for **studio space and residential live/work.**
- Interest in **gallery space.**



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1.25mm square feet sought by organizations

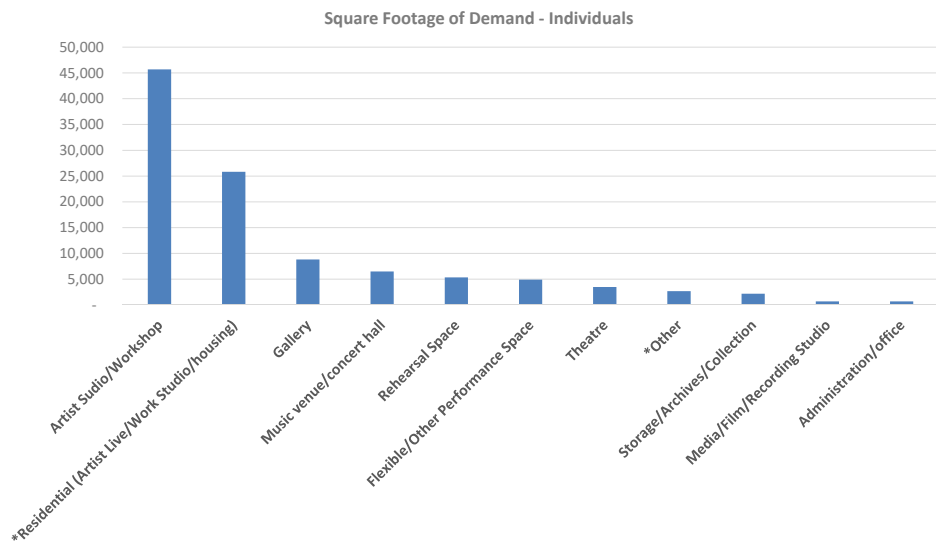
"Other" is nearly all VAG spaces for library, retail, food service, classrooms, collection, and building ops spaces.



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Over 106,000 sq. ft. of space sought by individual artists

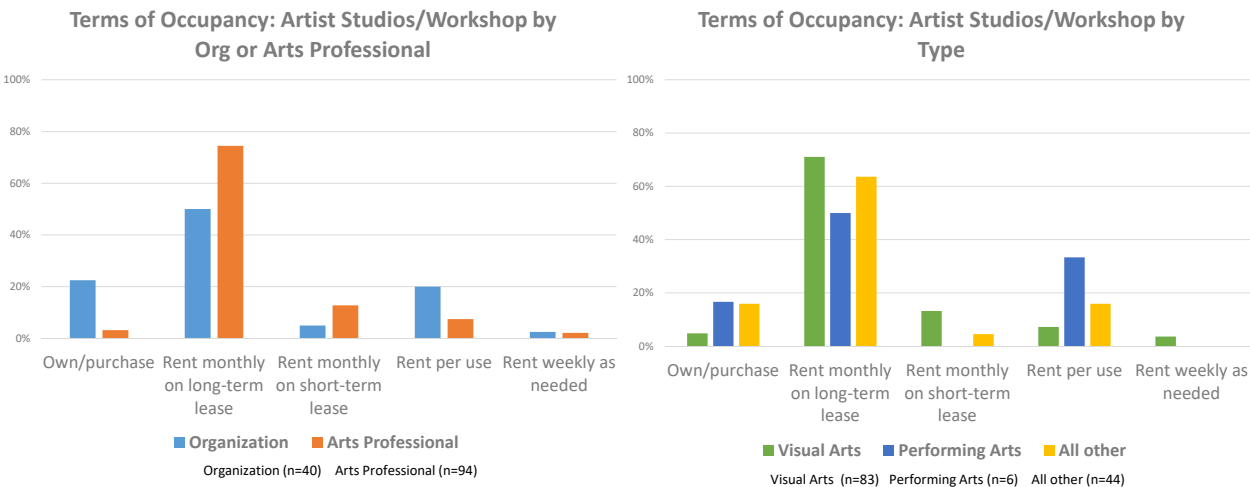
Most of the square footage sought by individual artists is for studio and live/work space.



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Long term lease is preferred tenancy arrangement for studio & workshop spaces

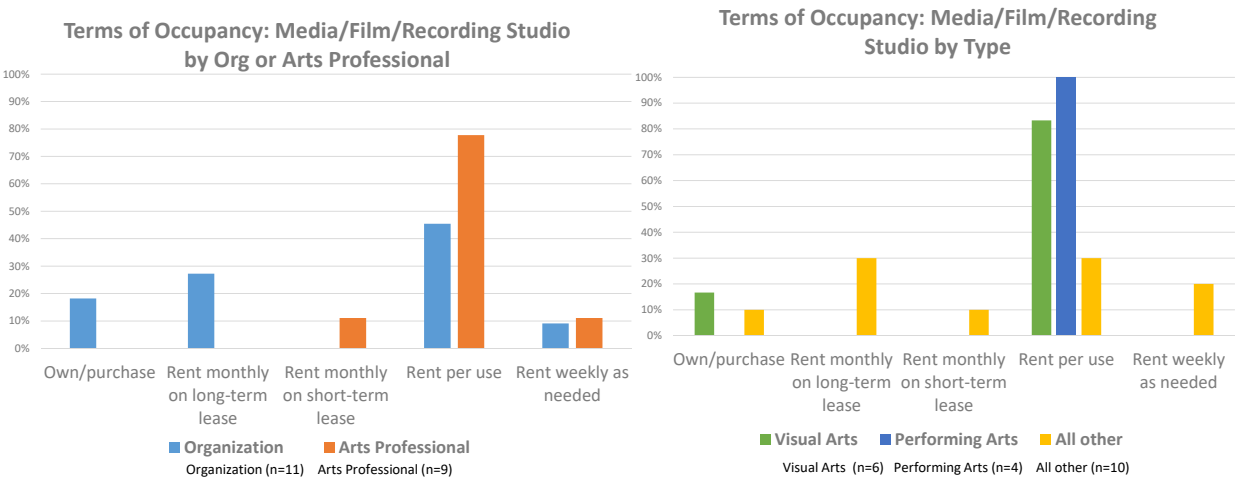
Both organizations and arts professionals are more likely to rent artist studios and workshops on a long-term lease.



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Those seeking media space would prefer to rent per use

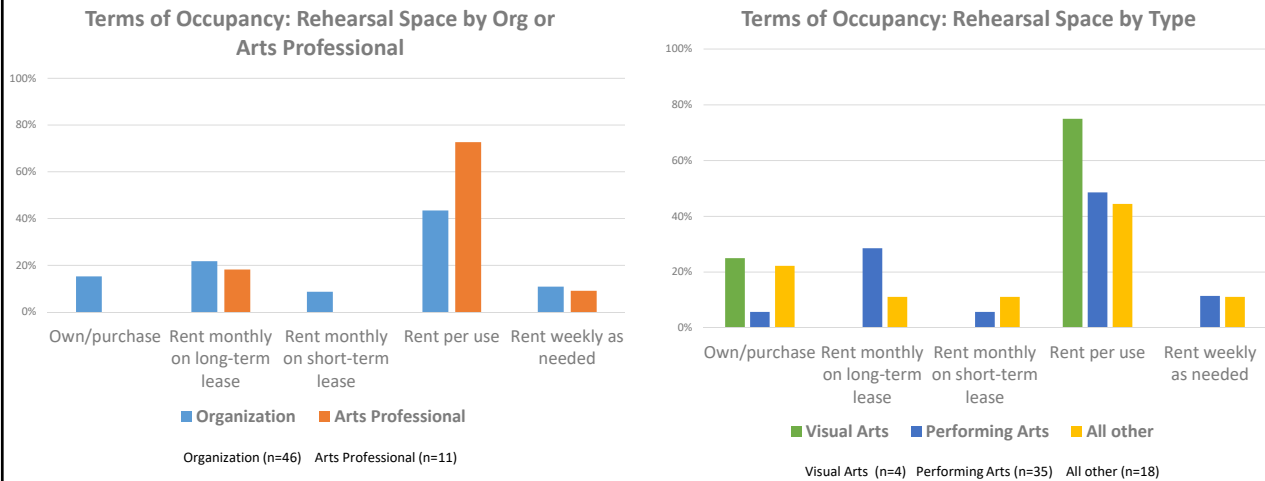
Media/film/recording studio space is more likely to be rented on a per use basis.



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Rehearsal space commonly rented on a per use basis

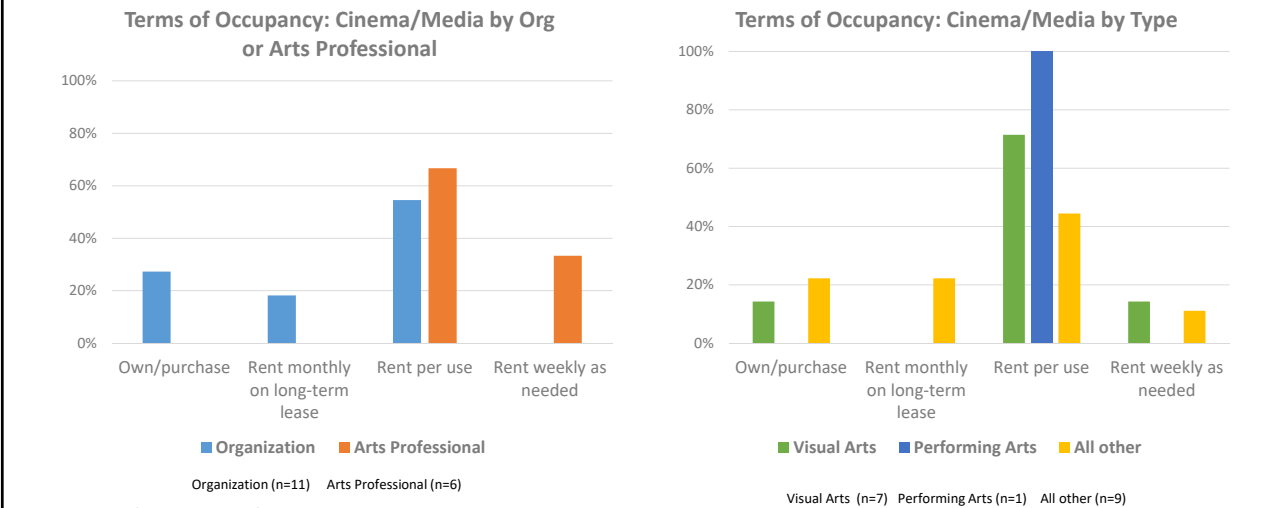
Rehearsal space is more likely to be rented on a per use basis.



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Cinema/media space also rented per use

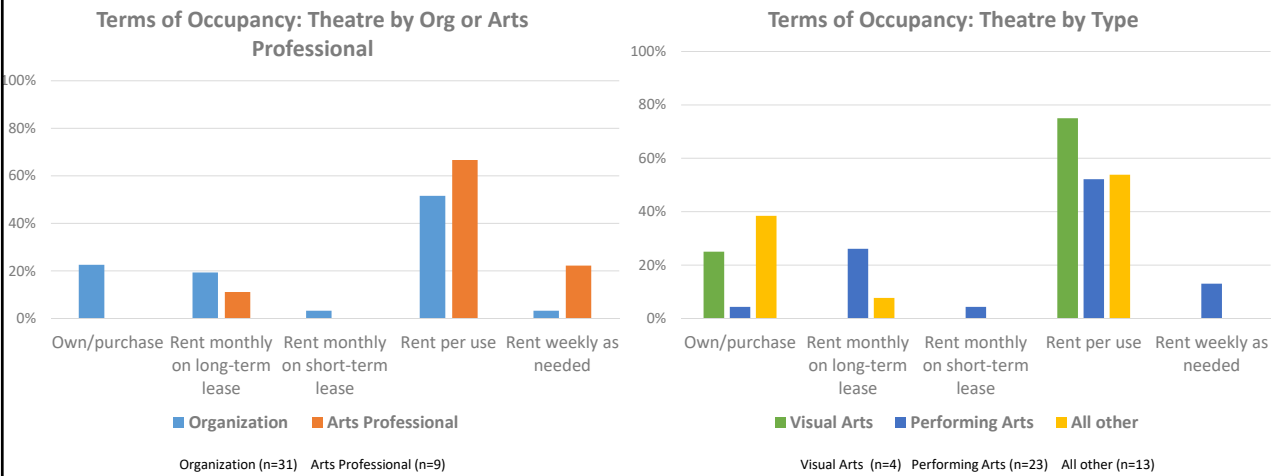
Cinema/media space is more likely to be rented on a per use basis.



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Theatre space rented per use

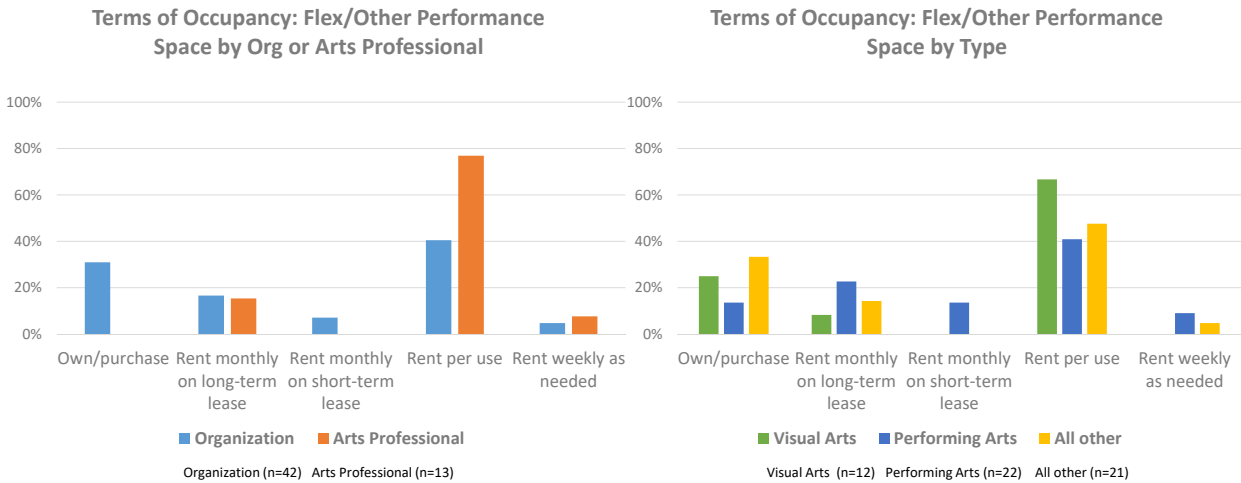
Theatre space is more likely to be rented on a per use basis.



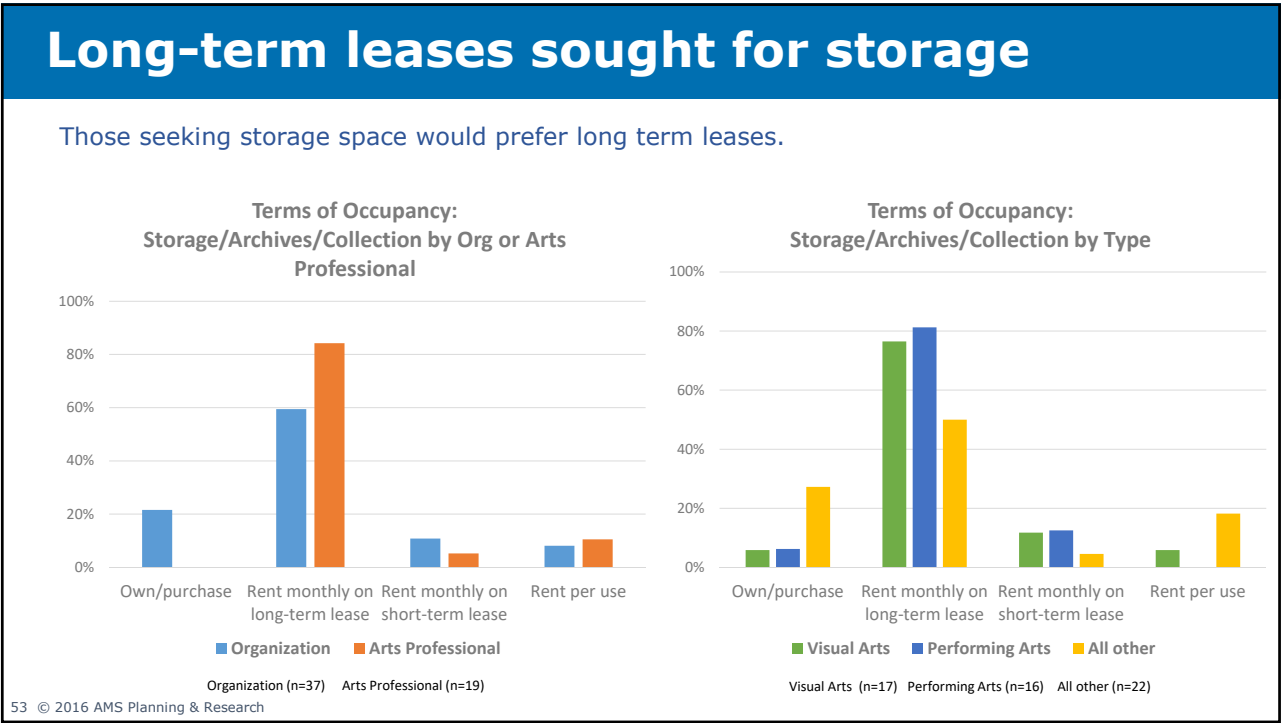
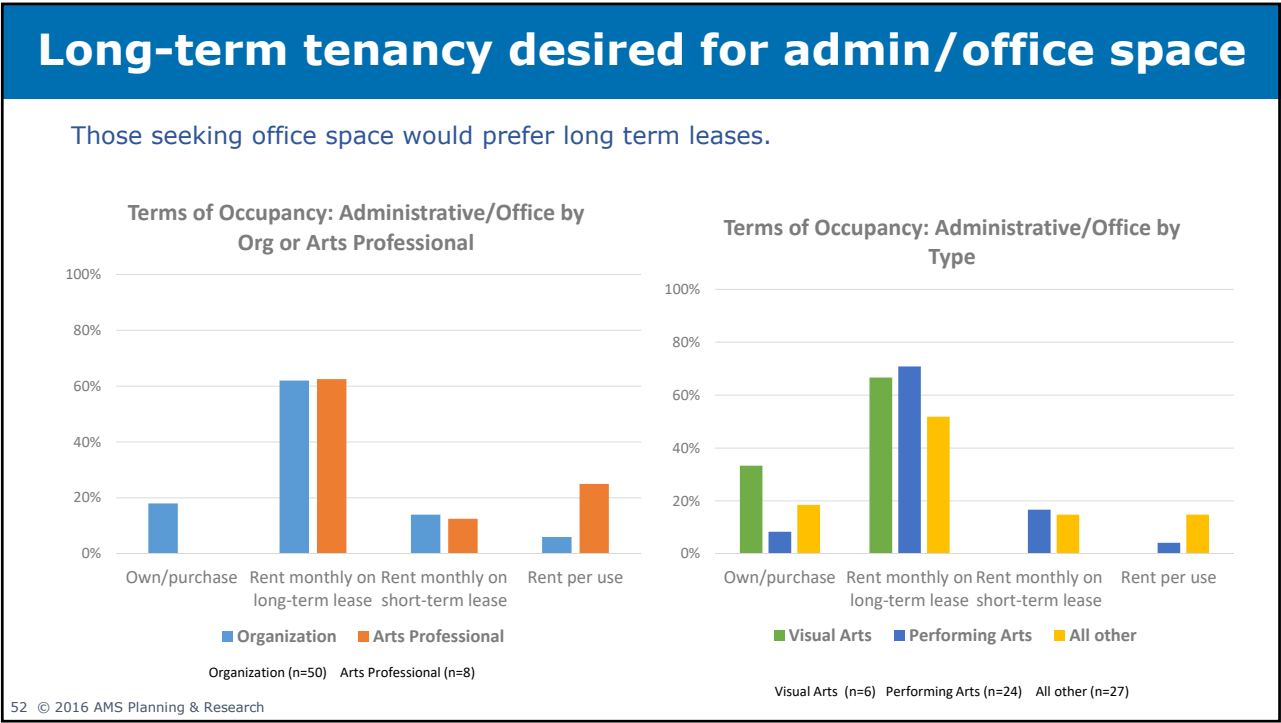
50 © 2016 AMS Planning & Research

Flexible/other performance space rented per use

Flexible/other performance space is more likely to be rented on a per use basis.



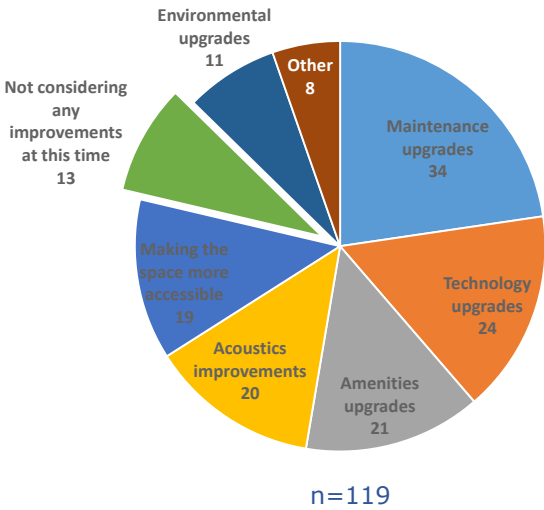
51 © 2016 AMS Planning & Research



Many are considering improvements

- 89% of organizations are considering some kind of improvement or upgrade.
- More than one-third are considering technology and/or acoustic upgrades.

Are there any improvements you are considering for the facility?

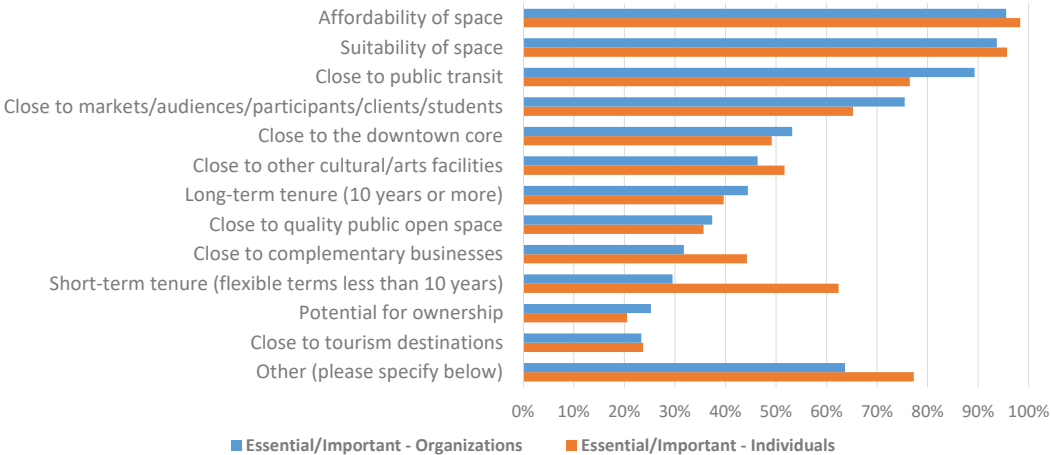


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Affordability, suitability, accessibility, and proximity most important factors

Individuals place higher importance on short-term tenure than long-term or potential for ownership.

Important Factors in Choosing Current Space



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Key Findings – *Future Needs*

- ✳ Optimism about future growth in patronage, programs, capacity, and funding
- ✳ 88% forecast need for additional space within the next 10 years
- ✳ Highest demand for studio, gallery, administrative, and storage spaces
- ✳ Many are looking to upgrade and improve existing space
- ✳ Affordability, location, access to transit, and suitability of space seen as highest importance

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New Project Activity



57

Current facility project activity

Organizations are more likely to be actively pursuing a facility project than individual artists.

Currently Working on a Facility Project

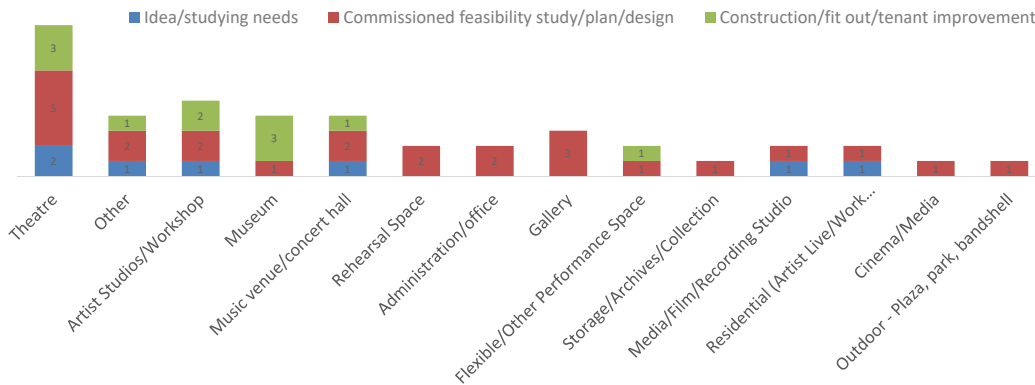


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Types of active projects are studios, storage, gallery, performing arts spaces

- There are a number of **studio or performing arts facility** projects in various stages of planning and development.
- 8 individuals report actively working on a space project (not shown).

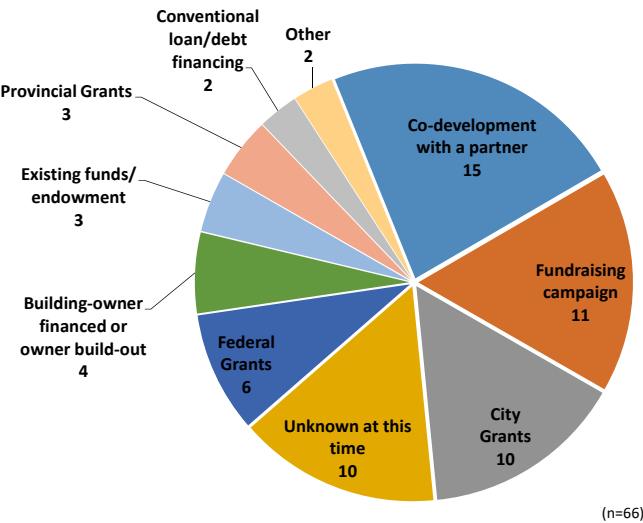
43 Active Projects



59 © 2016 AMS Planning & Research

Primary funding sources

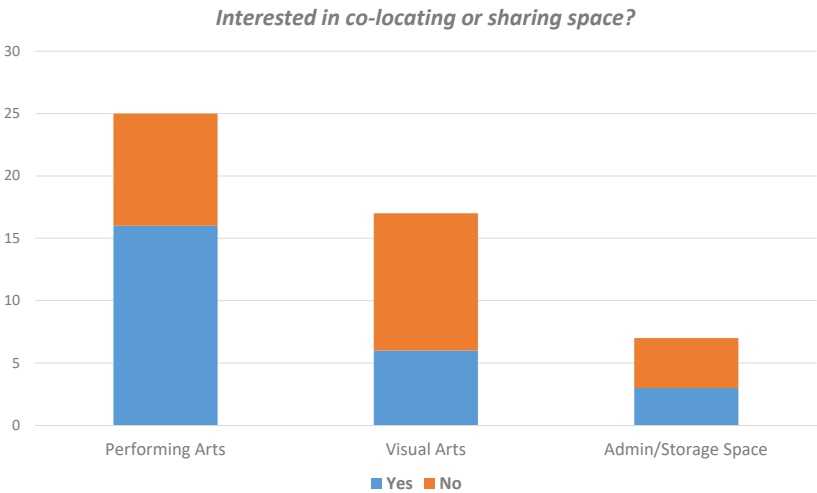
Funding sources and techniques for projects include co-developments and grants.



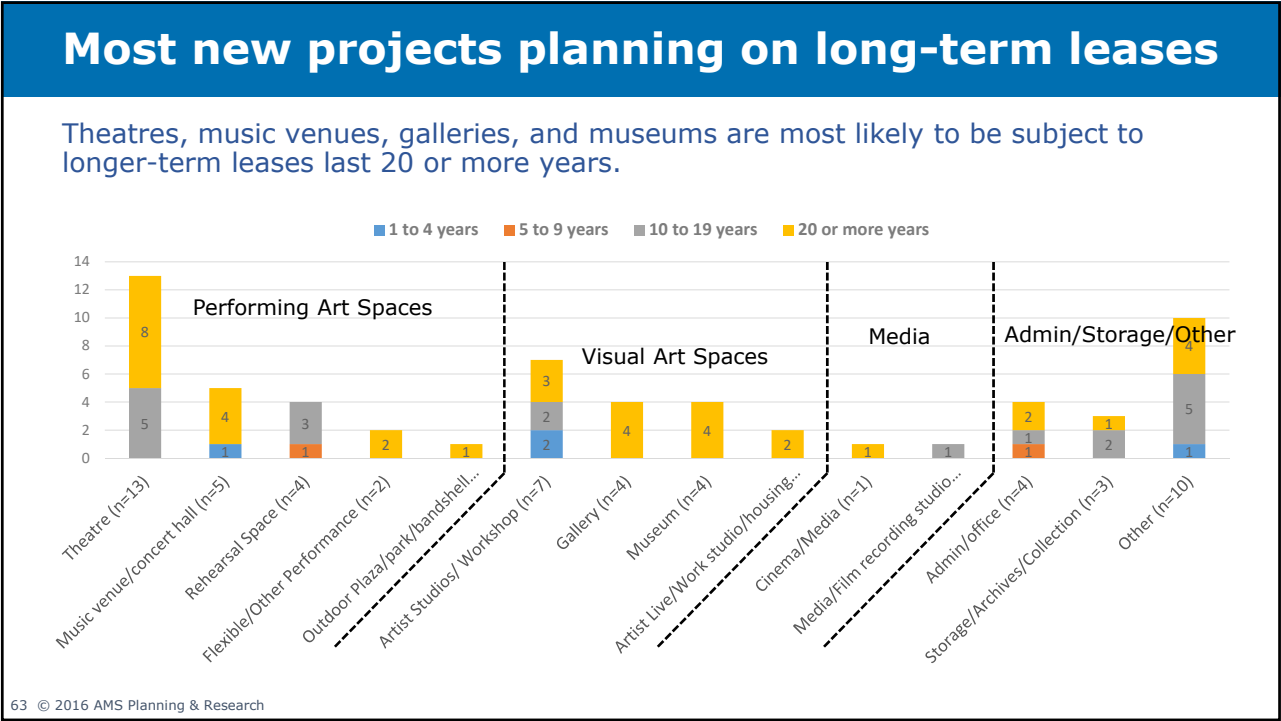
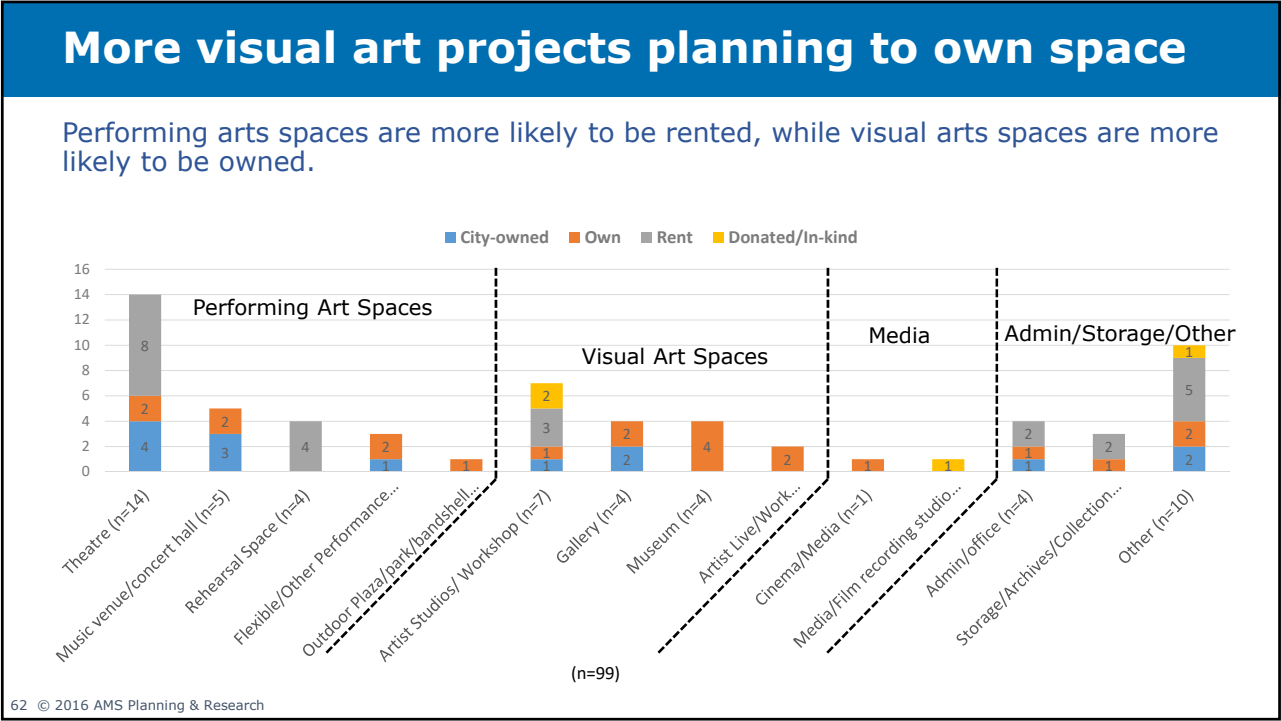
60 © 2016 AMS Planning & Research

Organizations pursuing performing arts spaces are more likely to be interested in co-locating or space-sharing

- 16 organizations pursuing performing arts facility projects express interest in sharing space with others.
- Overall, 51% are interested in co-locating or sharing new or improved space. (n=49)



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Key Findings – *New Projects*

Future Plans

- ✦ Many are looking to improve and upgrade existing space
- ✦ 60% of respondents indicate they are *seriously* considering a facility project at this time
- ✦ For projects being considered, most are pursuing studio or performing arts projects

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Thank you!

Q&A and your comments



65

Sample of Verbatims



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Selection of verbatim comments

"We have traditionally used marginal spaces with terrible landlords and unbelievable conditions (floods, no heat, too small, zero security etc.) which makes them "affordable" but **there are huge hidden costs that are never accounted for in surveys**, applications or budgets, yet these unrealistic figures become the basis for future grants, making it impossible to advance our position."

"I am considering relocating in the next 2-5 years as I doubt I will be able to afford my current space for much longer. I am considering a live/work space because my **rent for both my home and place of business exceeds my income**. In all likelihood, I will **need to relocate to another city**."

"The cost of living in Vancouver has forced me to cut back on studio time and get studio mates to offset my costs which means **my space has become much more limited**."

"Increasingly, **landlords do not see value in selling to non-profit organizations** as it appears to them that they will not be given the best offer. Landlords are holding out on sales for private developments that can afford to purchase well above current market values."

"**Having the City's Cultural Department assist operating organizations identify and guide space options is critical**, including cultural amenity options that are not readily identifiable through a public lens."

I have a city grant but the project keeps getting held up because of the **city building codes make it very difficult to keep the space under a reasonable price, or construction time frame**. we have had year long delays.

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Appendix 2: Vancouver Survey Instrument

City of Vancouver Making Space for Art Survey

AMS Planning & Research Corp., an international arts management consulting firm, has been engaged by the City of Vancouver to conduct a study on arts and cultural spaces in Vancouver. As part of our research, we are seeking input from arts and cultural organizations and individual artists to understand current and future programming activity, space use, and facility needs. This information will be used by the City to help inform future support for arts and cultural spaces in Vancouver.

Confidentiality

The City will make every effort to maintain the confidentiality of the information except to the extent necessary to communicate information for the purposes of evaluation and analysis.

If you have any questions about this survey please contact Bill Blake at BBlake@ams-online.com. Thank you.

Please note this survey is intended for Vancouver based artists and arts and cultural organizations.

Contact information is required to ensure we do not double count venues or organizational needs.

Please provide your contact information:

First Name	<input type="text"/>
Last Name	<input type="text"/>
Address	<input type="text"/>
City	<input type="text"/>
Postal Code	<input type="text"/>
Telephone	<input type="text"/>
email	<input type="text"/>

City of Vancouver Making Space for Art Survey

Please select the primary art practice you or your organization works in

- ☐ Craft/Makers
- ☐ Community Arts/Social Practice
- ☐ Dance
- ☐ Culture/Heritage
- ☐ Literary
- ☐ Media
- ☐ Multidisciplinary
- ☐ Music
- ☐ Theatre
- ☐ Visual Arts
- ☐ Design/Architecture
- ☐ Film/Television
- ☐ Other

Are you completing this survey on behalf of an organization that provides arts and cultural programs, services or operates an arts and cultural space in Vancouver?

- ☐ Yes
- ☐ No

City of Vancouver Making Space for Art Survey

Are you a professional artist or arts practitioner working in Vancouver?

☐ Yes

☒ No

City of Vancouver Making Space for Art Survey

ORGANIZATIONAL DETAILS

The following questions help us understand your organization and the people you serve.

Please note, we have, if available and when possible, pre-populated the survey with data collected through the City of Vancouver Grant Application processes.

Please only complete this survey once per organization.

Please provide the following:

Name most commonly used by your organization

Registered society name

Organizational Contact Information

Street Address

City

Postal Code

Telephone

General Email

Website

First Name

Last Name

City of Vancouver Making Space for Art Survey

Which of the following best *primarily* describes the organization you are representing?

- ☐ Artist run centre
- ☐ Craft/maker
- ☐ Community arts
- ☐ Facility/space provider/owner
- ☐ Theatre
- ☐ Dance
- ☐ Music
- ☐ Media arts
- ☐ Other performing arts organization
- ☐ Literary arts
- ☐ Visual arts
- ☐ Multi/interdisciplinary
- ☐ Festival/event presenter/producer
- ☐ Studio/production centre
- ☐ Ethnocultural
- ☐ First nations/Metis/Indigenous
- ☐ Museum
- ☐ Gallery
- ☐ Service/advocacy/umbrella
- ☐ Education/training
- ☐ Library
- ☐ Aquarium/science centre/garden
- ☐ Community centre
- ☐ Cultural centre
- ☐ Church
- ☐ Commercial (bar, cafe, retail)
- ☐ Creative industry (e.g. design, architecture, new media)
- ☐ Other

Is the organization mandated to serve specific communities or populations?

- ☐ Yes
- ☐ No

City of Vancouver Making Space for Art Survey

Which specific communities or populations is your organization mandated to serve? (Check all that apply.)

- ☐ Aboriginal
- ☐ Children and youth
- ☐ Disability
- ☐ Health
- ☐ Language
- ☐ Lesbian, Gay, Bisexual, Queer
- ☐ Senior
- ☐ Trans*, gender-variant, two spirit
- ☐ Women
- ☐ Ethno-cultural

How is the organization incorporated? (Check any that apply)

- ☐ Non-profit society (B.C. Society Act)
- ☐ Community service co-op (B.C. Cooperative Association Act)
- ☐ Charitable organization (Canada Not-for-profit Corporations Act)
- ☐ First Nations Band Council
- ☐ Affiliated with Government
- ☐ Affiliated with a foundation
- ☐ Cultural/social enterprise
- ☐ Sole proprietor
- ☐ Incorporated business
- ☐ Other

Arts and Cultural Activity (per year)

Please provide the following information for your most recently completed fiscal year

Total number of artistic works created, produced or presented	<input type="text"/>
Total attendance	<input type="text"/>
Total number of artists served (paid)	<input type="text"/>
Total number of artists served (unpaid)	<input type="text"/>
Total number of volunteers	<input type="text"/>
Total number of full-time equivalent (FTE) staff	<input type="text"/>
Last actual budget (total expenses)	<input type="text"/>
Percentage of total budget allocated for facility costs	<input type="text"/>

What is the geographic focus of your organization? Do you *primarily* serve the province, metro Vancouver, the City or are you more neighbourhood focused?

- ☐ Province of British Columbia
- ☐ METRO Region
- ☐ City of Vancouver
- ☐ Neighbourhood based

City of Vancouver Making Space for Art Survey

Which of the following neighbourhoods do you primarily serve?

<input type="checkbox"/>	Arbutus Ridge
<input type="checkbox"/>	Downtown
<input type="checkbox"/>	Downtown Eastside
<input type="checkbox"/>	Dunbar Southlands
<input type="checkbox"/>	Fairview
<input type="checkbox"/>	Grandview Woodland
<input type="checkbox"/>	Hastings Sunrise
<input type="checkbox"/>	Kensington Cedar Cottage
<input type="checkbox"/>	Kerrisdale
<input type="checkbox"/>	Killarney
<input type="checkbox"/>	Kitsilano
<input type="checkbox"/>	Marpole
<input type="checkbox"/>	Mount Pleasant
<input type="checkbox"/>	Oakridge
<input type="checkbox"/>	Renfrew Collingwood
<input type="checkbox"/>	Riley Park
<input type="checkbox"/>	Shaughnessy
<input type="checkbox"/>	South Cambie
<input type="checkbox"/>	Strathcona
<input type="checkbox"/>	Sunset
<input type="checkbox"/>	Victoria Fraserview
<input type="checkbox"/>	West End
<input type="checkbox"/>	West Point Grey

CULTURAL SPACE

Are you the primary operator of any arts/cultural space or arts/cultural facilities (including space rented, owned, leased or received in-kind on a full-time basis for any activities including presentations/productions, exhibitions, ancillary use, office/administration, storage, live/work space)?

☐ Yes

☐ No

	Facility name	Facility address	Facility type	Square footage (Size)	Do you or the organization you represent operate this space?	Current arrangement	City owned
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>
2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>
3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>
4	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>
5	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>
6	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>
7	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>
8	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>
9	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>
10	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>

City of Vancouver Making Space for Art Survey

Please provide the following information about the facilities you operate or utilize:

[illegible]

City of Vancouver Making Space for Art Survey

For each facility/space, please enter the following details:

	Facility description	Facility usage	Capacity	Please describe the utilization of this space?	Number of artists and/or arts organizations that use space in year
_____	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
_____	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
_____	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
_____	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
_____	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
_____	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
_____	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
_____	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
_____	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
_____	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
_____	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
_____	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Since 2008 have you or your organization completed any cultural space projects, such as:

- ☐ We did not complete a facility project
- ☐ Opened additional space
- ☐ Retrofit/renovated existing space
- ☐ Moved to a new purpose built space
- ☐ Moved to a new rented/leased space
- ☐ Purchased space
- ☐ Other

City of Vancouver Making Space for Art Survey

Space Needs

The following questions help us understand you or your organization’s facility needs for the future.

Do you see a need for additional space for you or your organization within the next 10 years?	
<input type="radio"/>	Yes
<input type="radio"/>	No

City of Vancouver Making Space for Art Survey

Which types of additional space do you think will be most needed by you or your organization in the next 10 years?

	Do you need this type of space?	How might you occupy this space?	What would be the maximum amount you/your organization would pay for this space?	Square footage required
Artist Studios/Workshop	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Media/Film/Recording Studio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Rehearsal Space	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Cinema/Media	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Theatre	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Music venue/concert hall	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Flexible/Other Performance Space	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Gallery	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Museum	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Outdoor - Plaza, park, bandshell	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Residential (Artist Live/Work Studio/housing)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Administration/office	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Storage/Archives/Collection	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Other (Please specify below)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>

Other specific types of space needed:

In the next five years, how do you anticipate that your organization will change in regards to:

	Increase	Stay the Same	Decrease
Audience/markets	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Operating budget	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Range/scale/number of programs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Artists employed/served	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Function/amount of space required	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Number of staff	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other anticipated changes:

City of Vancouver Making Space for Art Survey

When planning events, festivals, or public gatherings in the City of Vancouver, how easy is it to find and book a suitable space?

	<i>Outdoor</i> activities	<i>Indoor</i> activities
Availability on the dates required	<input type="text"/>	<input type="text"/>
Costs that are within your budget	<input type="text"/>	<input type="text"/>
Meets the technical requirements of your performance/event	<input type="text"/>	<input type="text"/>
A desirable location	<input type="text"/>	<input type="text"/>

How important were the following specific factors in choosing the spaces you currently use/need/operate?

	Essential	Important	Desirable	Not important
Close to other cultural/arts facilities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Close to tourism destinations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Short-term tenure (flexible terms less than 10 years)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Potential for ownership	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Long-term tenure (10 years or more)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Close to public transit	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Suitability of space	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Close to complementary businesses	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Close to the downtown core	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Close to quality public open space	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Close to markets/audiences/participants/clients/students	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Affordability of space	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (please specify below)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other specific factors:

City of Vancouver Making Space for Art Survey

Future Space Plans

Are there any improvements you are considering for your facility? Please check any that apply.

- ☐ Not considering any improvements at this time
- ☐ Maintenance upgrades
- ☐ Environmental upgrades
- ☐ Making the space more accessible (for example to universal design improvements for individuals with physical, sensory or mobility challenges)
- ☐ Technology upgrades
- ☐ Acoustics improvements
- ☐ Amenities upgrades
- ☐ Other

Are you currently working on any major cultural facility projects or are you seriously considering one for the near future?

- ☐ Yes, we have a facility project underway at the present time
- ☐ No, we are not seriously considering a facility project
- ☐ Relocating existing facility to a new purpose built space
- ☐ Relocating from your existing facility to a renovated space
- ☐ Expanding/opening additional space
- ☐ Retrofitting/renovating your existing space
- ☐ Purchasing a facility
- ☐ Securing a lease agreement for more than 20 years
- ☐ Other

City of Vancouver Making Space for Art Survey

If you are considering a new facility project, are currently pursuing a project, or you have completed a project since 2008 please complete the details below.

	Project title	Facility type	Development phase	Square footage	Total capital budget (or estimate)
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
4	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
5	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
6	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
7	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
8	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
9	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
10	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

City of Vancouver Making Space for Art Survey

Please provide the following information about your project(s):

	What is the primary source of funding for this project?	Start date of the project	Completion date (if applicable)	Are you or the organization interested in co-locating or sharing this space or services?	What will be the status of your tenure when the project is completed?	What will be the length of tenure at the start of operations?
_____	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
_____	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
_____	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
_____	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
_____	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
_____	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
_____	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
_____	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
_____	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
_____	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
_____	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Other types of funding for the project(s) described above:

What is/will be required to make the project(s) you identified above successful?

City of Vancouver Making Space for Art Survey

Please provide any additional comments below.

Appendix 3: Trends and Exemplar Research report

Trends Research/Exemplars

City of Vancouver Update to Key Gaps in Cultural Infrastructure

May 2017 (Updated September 2017)

AMS Planning & Research Corp.

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Introduction

As Vancouver real estate values continue to escalate, non-profit arts and culture organizations and artists find it increasingly difficult to afford and build equity in space. Cities across Canada and the U.S. are facing similar issues; AMS examined emerging trends and models impacting the development of space for arts and

culture in several comparable cities – Calgary, Toronto, Seattle and San Francisco.

Most major cities that have developed a Cultural Plan have identified as part of this plan, specific goals and priorities for developing creative spaces. Providing affordable and accessible spaces for artists to live, work, teach, produce, exhibit, and perform is seen as a key component of overall city planning and economic development goals – creating a vibrant cultural sector is essential to creating a vibrant city.

Some tools have been around for years – zoning provisions and regulations, tax credits and incentives, development bonuses that promote arts and culture development – and they continue to be used successfully in some cities.

Recognizing the need to help individual artists and arts organizations with space needs, city arts and cultural departments have begun offering technical assistance programs, like online space matching services, networking opportunities, workshops, webinars, publications, and toolkits to help artists and organizations understand and navigate the complexities of real estate, tenant/landlord issues, and business

practices. (SpaceFinder from Fractured Atlas, is an example of a successful and rapidly expanding online space matching service found in a growing number of American and Canadian cities.)

In Vancouver, the Social Purpose Real Estate (SPRE) Collaborative has been engaging in these issues for the broader community of non-profit organizations who need assistance with real estate needs. The SPRE Collaborative works to enhance the sustainability, capacity, and assets of this sector. Their efforts include a 2013 report on space needs, with specific sections on the cultural sector and independent artists. Their website includes useful online links to resources, toolkits, and a space matching service, a version of SpaceFinder called “Have Space Need Space.”

Private non-profit developers who specialize in developing creative spaces collaborate with cities’ cultural departments to achieve shared goals of providing space for artists and cultural organizations (live/work spaces, collaborative and community spaces, arts incubators).

Trends in developing space for arts and culture occur in tandem with related city planning and economic

development goals – adaptive reuse of neglected or historic buildings, neighborhood revitalization, cultural tourism, increasing visibility of and access to arts and culture for underserved populations.

Many of these efforts are centered on “creative placemaking” -- using arts and culture to advance community development goals (affordable housing, community revitalization, economic growth, etc.). The end results may be the same – artist live/work spaces or community centers with co-working/office space for arts organizations – but the priority is on community development. The focus is on using arts and culture as a mechanism to address broader community needs, not simply advancing the arts and culture sector for the sake of improving access to arts and culture.

Partnerships are a key component to arts facility development efforts, including public-private and cross-sector partnerships. Funding for most creative space initiatives comes from an amalgamation of sources – foundation grants, bank financing, community development banks, government programs – including low-income and historic tax credits. In the U.S. for example, the NEA Our Town grant program (which

provides matching grants up to \$200,000 for creative placemaking projects) requires at least one government entity and one nonprofit organization, with one of the partners having an arts and culture focus. Additional partners across all sectors, although not required, are encouraged.

Issues faced by arts and culture organizations are often part of the larger nonprofit environment, which faces the same space affordability challenges. Making arts space development part of a larger discussion about non-profit and social purpose real estate issues, and convening partners to address these overall issues can be a way to get arts facilities development on the larger public agenda. In contrast to a strategy of including arts with all nonprofits, some collaborative efforts focus solely on arts and culture organizations -- including for-profit businesses (small galleries or music venues, for example) as well as nonprofits. Small businesses in the cultural sector also struggle with space affordability; convening for-profit entities alongside the non-profits can help all work toward common solutions.

Even after successful developments have been put in place, affordability issues can still remain – particularly

with the prospect of escalating property taxes that can be a burden to nonprofits arts organizations. This is an issue in Toronto and Ontario due to tax assessments based on “highest and best use,” rather than current use. The City of Toronto is working with provincial government to change tax policy for properties that house cultural agencies and activities, so that property taxes don’t serve as disincentives to arts and culture development. Current tax assessments encourage developers to sell and build to the “highest and best use” – luxury condos, rather than affordable rental spaces for artists, especially in hot real estate markets like some Toronto neighborhoods. This is an issue Vancouver may need to be aware of, as well.

Calgary

Calgary Arts Development Authority (CADA), established 2004

Mission: Calgary Arts Development supports and strengthens the arts to benefit all Calgarians

Vision: A creative, connected Calgary through the arts

We invest and allocate municipal funding for the arts provided by The City of Calgary and leverage these funds to provide additional resources to the arts sector.

We are a connector, facilitator, collaborator, champion, supporter, amplifier, investor, catalyst and opportunity-maker.

(CADA, Calgary's designated arts development authority, is separate from the city's Arts & Culture Division, which is primarily responsible for the Calgary's public art program, and festivals and events.)

Initiatives/Programs

cSPACE

In partnership with the Calgary Foundation CADA created cSPACE in 2011 to address the space needs for artists and non-profits to connect and collaborate. They are developing affordable, sustainable and collaborative workspaces, with funding from government, foundations, individual donors, and the private sector. (These projects have also been partially funded through CMSI funds, identified through the CSIP evaluation process – described below.)

<http://www.cspaceprojects.com/>

Two current projects:

- King Edward Arts Hub & Incubator: 41,000sf, below-market creation, production, exhibition and performance space, in rehabbed school building, available for long-term lease
- ArtsCoLAB: affordable, short to medium-term desk rental and shared office and meeting space for artists and creative sector workers, non-profit and charitable organizations; managed by cSPACE Projects in partnership with Calgary Arts Development

Artists in the Workplace

Created in 2015 in partnership with the Calgary Chamber, Artists in the Workplace connects businesses that have extra space with artists and arts organizations looking for workspace. Businesses that participate in the program collect nominal rents and are eligible for tax benefits for supporting the arts. CADA works with businesses to promote the benefits available for offering space to artists and organizations. Artists submit an

Expression of Interest. Available spaces are listed and described on the CADA website.

Example of a partnership with a private building owner:

Shell Employees' Credit Union's downtown office offered space to arts organizations, to provide Calgarians working or living downtown with opportunities to engage in the arts, while enhancing the leaseholder's social responsibility reputation. Shell Employees' Credit Union selects the winning bid, based on an application, which includes information on how the arts organization will engage Calgarians who work in the oil and gas industry, and the ability to offer charitable tax receipt to the leaseholder.

Although this program has been successful, there have been some challenges in filling the spaces. There were actually more responses from businesses offering space than from arts organizations wanting space. Businesses often wanted more in rent (even though at reduced rates) than artists could afford. The places that worked most successfully were raw, light industrial spaces, primarily used for rehearsal space.

The Artists in the Workplace Program is being transitioned to SpaceFinder (which they recently launched in 2016). A grant from the Alberta Real Estate Foundation helped fund the costs of setting up SpaceFinder and encouraging venues to sign up. (The Real Estate Foundation supports a variety of public non-profit space initiatives, not just cultural -- an example of exploring partnerships beyond the cultural sector.) CADA likes the versatility and granularity of SpaceFinder and have found it easier to reach critical mass with the number of listings.

Grants

Cultural Space Investment Process (CSIP)

CADA created this mechanism in 2008 to evaluate cultural facility projects for city funding. The Cultural Space Investment Process, CSIP (formerly called the Art Space Investment Process), is an evaluation process to identify priorities to The City of Calgary for cultural infrastructure projects, with grants given for up to 25% of total capital costs, so that public funds are leveraged 3:1 (with 75% from other fundraising efforts).

Projects are rated on factors such as compelling vision, advanced readiness, strong feasibility, and sustainability. CSIP is an assessment process that projects must go through to get city funding through the City's Cultural Municipal Sustainability Initiative (CMSI), the cultural portion of provincial MSI funds, which support local infrastructure projects. Projects recommended by CSIP assessors are added to the City's Culture, Parks and Recreation Infrastructure Investment Plan.

The evaluation process (arms-length, independent, defined criteria) has been extremely useful in setting priorities and can be transferred to other programs as a way to develop and evaluate cultural facility funding priorities. After receiving recommendations, the city performs its own due diligence evaluation to ensure financial and operational sustainability of projects.

In 2008 Calgary City Council committed 5% of their MSI funds to cultural infrastructure over the next 10 years (a total of \$165m over 10 years). While the program has been a success, funds were allocated for a specific time span, and CADA staff are in the process of planning for how to pay for priorities after the funding stream ends

Projects funded through this process have ranged from large marquee facilities (Taylor Centre for the Performing Arts, National Music Centre, Canada Sports Hall of Fame) to smaller, community/artist-based facilities (Folk Festival Hall, DJD Dance Centre, King Edward School Arts Incubator).

Other Services

Arts Spaces Networking Nights; website filled with numerous links, resources, and technical advice

Future Trends

Future trends in Calgary point to co-location of arts groups with other community organizations – especially in faith-based and educational spaces during times when they are not being used by congregants and students. Unique to Calgary is the city's network of many neighborhood Community Halls, owned by the City, but managed by local community associations. Programs in each Community Hall vary as each neighborhood has its own priorities, but partnerships

are beginning to develop between Community Halls and arts organizations. An arts group may get space (at no or minimal cost) for its programs, in return for managing the Hall. The number of these neighborhood-focused sites is unique to Calgary, but the partnership idea can serve as a model. Arts organizations partnering with community centers, recreation centers, schools or churches that might have extra space get the benefit of being embedded within a neighborhood, and patrons who don't want to travel to a downtown arts district may appreciate having cultural opportunities closer to home.

Toronto

Arts & Culture Services

City government department with responsibility for running museums, historical sites, performing and visual arts centres, community cultural centres, and helping community arts organizations access municipal services and facilities

(Located within Economic Development & Culture department)

The Cultural Partnerships Unit works to increase the supply of affordable, accessible and sustainable cultural spaces, particularly outside the downtown core; and to develop space for emerging cultural enterprises, collaborating with commercial developers, public works projects, the City's Planning Division, and the Toronto Community Housing Corporation.

Initiatives/Programs

Bonusing incentives

Toronto's 2011 cultural plan emphasized the need for upgrades and development of facilities for arts organizations and community cultural groups as a "critical next step to ensure a vibrant cultural community." In their efforts to develop cultural space, Toronto staff identified Section 37 (a bonusing provision in Ontario's Planning Act that requires developers to contribute a community benefit in exchange for zoning variances in height/density) as an important tool to support creation of and improvements to cultural space.

Examples of arts/culture facility projects that resulted from Section 37 funding:

- Artscape Distillery Studios – opened 2003, 50,000sf, 63 below-market work and retail studios, offices, rehearsal and performance spaces; part of a larger redevelopment of Toronto's Distillery District, using Section 37 funds from the private developer Cityscape, which owns the property and gives Artscape a below-market long-term lease for the space.
- Artscape Wychwood Barns – opened 2008, 60,000sf space in a former streetcar repair facility; houses 26 artist live/work spaces, 10 studios, programming and administrative space for artists and non-profit organizations, a community-run gallery; covered outdoor space for farmer's markets, art markets, events. \$1m of \$22m total cost secured through Section 37 negotiations with the private developer working on a condo tower within the same ward. Owned by the City of Toronto, operated by Artscape.
- Artscape Triangle Lofts and Triangle Gallery – opened 2010, 56,000sf, affordable housing and gallery space for artists (48 below-market lofts and 20 affordable rental lofts); private developer Urbancorp was given additional height/density for

their market-rate condominiums in exchange for offering space to Artscape at construction cost.

Rental units owned by Artscape, condo units owned by artists/arts professionals.

- TIFF Bell Lightbox, opened 2010, headquarters for Toronto International Film Festival, with cinemas, galleries, studios, center for students and scholars, restaurant, public atrium; developer created the five floors of TIFF Bell Lightbox in exchange for permission to build a 42-story residential tower above.

While these projects have been extremely successful, the result has been that arts and culture developments happen only in wealthier neighborhoods where demand for other development is high. There is continuing concern with how to bring cultural spaces to other areas where the bonusing incentives are not in play.

Grants

Culture Build Investment Program

City-funded grants specifically for arts and culture facilities, first instituted by the City Council in 2002. The

grants provide matching funds to small and mid-size cultural organizations for repair and small capital projects (maximum award \$100,000). Applications are evaluated by an independent Peer Advisory Committee on factors of cultural merit, financial management, urgency of proposed repairs/renovations, and community access and outreach.

2016 awards totaled \$330,000 to 11 organizations, with amounts ranging from \$4,000 to \$70,000.

Other Arts Development Examples

401 Richmond

Private developer (Urbanspace) purchased in 1994 and transformed a historic warehouse in downtown into a thriving arts/culture hub, home to over 140 cultural producers and microenterprises; also a café, arts-enriched early learning centre, community courtyard. The development is currently under threat, however, due to rising property taxes.

Artscape

remains a major creative space developer in Toronto, with 10 current projects and more in development. They have partnered successfully with the City, accessing city incentives, funds, and assistance with things like permit exemptions and guaranteed, favorable loan rates, which have enabled the projects.

Future Trends

Toronto has made great strides in overall city-wide cultural planning, completing a cultural spaces inventory as a benchmark; priorities for the future will focus on smaller, more specialized planning -- neighborhood-level cultural plans and task forces for more specific subsets within the cultural sector (for example, they are starting a live music venue group and registry). They hope to be more proactive and effect change more easily by concentrating on more specific, local neighborhood issues. Partnerships with schools and other public buildings have begun to be explored, but these efforts have been slow, due to bureaucratic/insurance concerns. While all agree that it makes sense for arts groups to use a school after hours, in practice it is difficult to implement.

Seattle

Office of Arts & Culture

Mission: We activate and sustain Seattle through arts and culture

Vision: The Office of Arts & Culture envisions a city driven by creativity that provides the opportunity for everyone to engage in diverse arts and cultural experiences

Seattle has recently created within the city's Office of Arts and Culture, the Cultural Spaces Program, charged with preserving, creating and activating the city's cultural square footage. Since naming their first Cultural Space Liaison in 2013, they have concentrated their efforts on three constituencies: artists and arts organizations "to strengthen their role in charting the future of their creative spaces," developers and builders "to incorporate arts and culture into new projects," and property owners "to incentivize the preservation and expansion of arts and culture."

Initiatives/Programs

Cultural Space Inventory

Begun in 2013 and still ongoing, the database (available online) currently includes over 860 cultural spaces and serves as a framework for determining cultural space-related priorities and initiatives for the City.

Spacefinder Seattle

Online matching tool for artists and art spaces, Spacefinder Seattle is a database of rental spaces in the region available to artists and arts and cultural organizations. (365 listings, searchable by a wide variety of amenities, types of use, rates, etc.) [created by Seattle Office of Arts & Culture, not an affiliated SpaceFinder product]

ARTS at King Street Station

Development currently in process, a partnership of Seattle Office of Arts & Culture, Office of Economic Development and Department of Transportation to include a cultural hub on the upper floors with 17,000sf

of multi-disciplinary arts presentation spaces, public areas, community gathering spaces and offices.

The city purchased the 1908 train station in 2008 and has renovated the building (which continues to serve as an Amtrak station); currently planning underway to create an engagement plan for how best to allocate the cultural space on upper floors.

Funded through an increased admissions tax allocation (since 2010 75% of admissions tax funds have been allocated to fund the Office of Arts & Culture; this allocation was increased to 85% in 2016 to increase support for arts and culture and pay for this specific project)

Grants

Cultural Facilities Fund

offers capital funding to arts organizations through grants (up to \$50,000) for facility projects -- ADA compliance, renovations, new facility projects. The grants are designed to cover up to 50% of a project's total cost.

14 projects awarded funding in 2016, total funds given = \$240,000, with grants ranging from \$2,000 to \$35,000.

Projects are rated on: quality and urgency of the project in relation to the organization's mission; impact of the project and public benefit; feasibility and organizational capacity.

This fund, in existence since 2012, has grown since its initial allotment of \$150,000 to \$1 million in 2018, and has been considered quite successful in assisting arts organizations with facilities development. But, it still doesn't get to the core issue of displacement. Described as "rearranging the deck chairs on the Titanic" the fund helps organizations with facilities improvements, but they may ultimately lose spaces as rents keep rising. It also skews toward larger, more established organizations, because of the need to achieve a certain level of programming to be eligible for the grants.

Other Arts Development Examples

Artspace has created four developments in Seattle, but may have reached their saturation point, and probably will not be pursuing additional opportunities.

- Artspace Mt. Baker Lofts, opened 2014, 57 live/work spaces, cost \$18m
- Artspace Hiawatha Lofts, opened 2008, 61 live/work spaces, cost \$17m
- Tashiro Kaplan Artist Lofts /Tashiro Arts Building, opened 2004, 50 live/work spaces; 28 commercial arts-related galleries, studios, cost \$16.5m

Future Trends

Seattle's Cultural Spaces Program has begun focusing on access/ownership; even with facility and rental assistance, renting is ultimately a losing proposition for most nonprofit arts organizations. Just beginning their planning to achieve this goal, they have been looking to San Francisco as a model. The goal may be some form of cash rental assistance and technical assistance – helping to subsidize rents so that organizations can save

towards a down payment. The ultimate goal is ownership, so that occupancy costs can be stabilized, because Seattle rents continue to escalate quickly.

Efforts to encourage partnerships and co-locating have not worked in the past, mostly because Cultural Spaces Program staff tried to convene what they thought were like-minded organizations -- but in reality weren't. They've learned that the organizations need to come together on their own and agree to partner before exploring co-location options.

They have also been working with the City's Economic Development Office on a Commercial Space Affordability Task Force, exploring options for the broader market. Affordability is an issue not just for nonprofits, but for other small for-profit businesses in Seattle. (One idea: using a Public Development Authority, real estate entity supported by municipal government, to target specific development sectors – for example, cultural arts.)

Seattle Update

The Office of Arts & Culture recently released a comprehensive report, "The Cap Report," outlining steps

the city can take to “create, activate and preserve” cultural spaces. Their approach focuses on options from a menu of relatively small action items – from specific building code and permitting modifications to creating new technical assistance programs that compile and share funding sources and case studies. One of the more innovative ideas offered is to create a Cultural Certification program (modeled after LEED certification) for buildings and people.

By creating a range of actions to apply on multiple levels and in various scenarios, Seattle hopes to try numerous strategies to advance efforts to secure cultural space.

Appendix A summarizes the specific ideas offered by the report.

San Francisco

Community Arts Stabilization Trust (CAST)

Mission: to create stable physical spaces for arts and cultural organizations to facilitate equitable urban transformation

San Francisco’s Nonprofit Displacement Working Group, a part of the city’s Nonprofit Sustainability Initiative (founded to help find solutions for arts and social service nonprofits having difficulty finding affordable space), led to the creation of CAST in 2014. \$5 million from the Rainin Foundation in seed money helped create CAST, a real estate development and holding company, to address these needs – through technical assistance, grants, partnerships with city agencies and funders, and purchase/development of properties for arts organizations to lease to own.

Funding partners: Kenneth Rainin Foundation, Northern California Community Loan Fund, San Francisco Office of Economic and Workforce Development

CAST serves as a non-profit real estate and holding company, leasing space to an arts organization at below market rates, while the arts organization saves up enough to purchase the property at the initial purchase price.

Initiatives/Programs

Real Estate Developments

2 projects purchased and renovated by CAST, with arts organizations leasing to own:

- Luggage Store/509 Cultural Center – 6,000sf gallery space/multidisciplinary arts programming
- CounterPulse theater building – incubator for community-based arts and culture, with rental space for meetings, classes, rehearsals (but not public performances)

Technical assistance to arts organizations

Assistance with financial planning, space planning, lease/purchase negotiations, fundraising capacity development, facilities management

Although there is a space finding database in San Francisco, it is set up mainly for Performing Arts Spaces (a co-project of Theatre Bay Area and Dancers'Group).

Grants

Nonprofit Displacement Mitigation Program: financial assistance (up to \$75,000) for relocation costs, legal expenses, etc. awarded to social service and arts organizations (8 arts and 24 social service organizations

received funds in Dec 2016; 5 arts and 11 social service organizations received funding in April 2015)

Future Trends

CAST is currently expanding into Oakland with “Keeping Space–Oakland” grants: up to \$75,000 for arts organizations facing displacement, to help with real estate transactions for permanent affordable space.

CAST's efforts help: stabilize rents for arts/culture organizations by freezing real estate prices in an escalating market; increase financial and technical acumen of arts/culture organizations; assist arts/culture organizations with capitalization by helping them gain a permanent asset.

To accomplish these goals: they bring together multiple public and private partners; use a variety of financing (including New Market and Historic Tax Credits) to bring new capital to arts/culture facility projects.

San Francisco Nonprofit Sustainability Initiative is an overall initiative to help all nonprofits with space concerns; CAST developed as a specific way to target the

arts sector and they work in partnership with the city's larger nonprofit efforts.

Other Organizations

Private non-profit developers with cultural space projects located in our exemplar cities (and other locations):

Artscape, Toronto

a major player and frequent collaborator with the City of Toronto in developing creative spaces.

A not-for-profit urban development organization that makes space for creativity and transforms communities

BC Artscape is the Vancouver-based affiliate; they have just begun a community engagement planning process for their first project:

268 Keefer Street – 48,000sf, multi-tenant cultural hub with space for artists, arts organizations, community groups, flexible program space, public spaces; Artscape has long-term lease for three floors of Sun Wah building

Artspace, Minneapolis

a national leader in developing affordable artist spaces, though a combination of financing mechanisms, often through the use of low income housing and historic tax credits. Artspace owns and operates all of their projects, ensuring long-term affordability and viability, which they consider a key to their success.

Mission: to create, foster, and preserve affordable space for artists and arts organizations

Artsbuild Ontario, Kitchner

A non-profit arts service organization dedicated to realizing long-term solutions for building, managing and financing sustainable arts in Ontario communities. We provide organizations with training, tools and resources that support the development and management of creative spaces

Although not a developer, they offer useful resources and training opportunities for communities, artists, and cultural organizations to help address space needs.

Initiatives/Programs

SpaceFinder Canada

Matching tool for landlords and artist renters in specific communities and in provinces of Alberta, Manitoba, BC; searchable by location, type of space (rehearsal, studio art, exhibition, etc.), price per hour/day/week/month, and many other amenities and criteria

Asset Planner for the Arts

In partnership with Ameresco, an asset management/sustainability firm, and Walter Fedy, design/construction firm, offers a walk-thru and building inventory and learning webinars to teach arts organizations how to identify and develop facility issues, plans, budget forecasts. Minimal fees for the service, depending on the size of the facility

Arts Facilities Mentoring Network

Connects cultural leaders who are engaged in facilities issues with experienced mentors in their field for an initial workshop, and monthly discussions/meetings (up to three hours each month)

Bricks&Mortar – online searchable database of arts facilities, currently being created, as organizations register and enter information; they hope to use the data as a basis for advocacy for arts facilities investment.

Funding for the project from Department of Canadian Heritage and Ontario Trillium Foundation.

Resource Library

Example of a multi-disciplinary/cross-sector partnership:

ArtsBuild Ontario partnered with the Accelerator Centre and City of Kitchener to create 44 Gaukel, an affordable 11,000sf space for both artists and tech startups. Includes administrative space for local arts/culture organizations and artists, tech startups; rentable rehearsal space; opened Oct 2016

Other Examples not in our Exemplar Cities

Splendor, Amsterdam

A music venue founded and run by musicians in 2010; each of the 50 musicians contributes €1000 annually and agrees to play once a year. Members (about 1,000 in 2016) each pay €100 annually to be able to attend concerts for free. The musicians have access to the building anytime for rehearsals, performances, projects.

Two staff manage the building; volunteers help with tickets, concert set-up, and lighting. A committee of seven musicians provides oversight.

The building, a former bathhouse that was renovated to include two performances spaces, is leased from the city at a commercial rate. Initial funding for renovations was raised from private donors, each of whom were entitled to a private concert in exchange for their donation.

Splendor also offers music lessons, children's choir and concerts, and a Summer Academy for aspiring musicians, as well as private rentals, for additional revenue.

New York City

An assortment of tactics are being used in New York City to address the issue of affordable space, many are variations of what other cities are doing: space matching, zoning incentives, and partnerships among city agencies and private developers. Some examples: CUNY Dance Initiative offers empty rooms in CUNY's performing arts center to dancers and choreographers, through a competitive application process. Since its

launch in 2014, 67 residencies in 13 CUNY colleges have resulted.

Special Purpose District – 125th Street District was the first to offer an arts bonus to provide an incentive for the creation of visual or performing arts spaces. For buildings over 60,000sf, at least 5% of the development must be occupied by designated cultural uses.

City Department of Cultural Affairs partnered with the Mayor's Office, New York City Economic Development Corporation, and Housing Preservation and Development office to create an inter-agency task force, AREA (Affordable Real Estate for Artists) to work with real estate developers, housing agencies, and funders. The City committed \$30million in capital funding and the conversion of underutilized City-owned assets for projects.

Music Venue Trust, London

Founded in January 2014 "to protect the UK live music network by securing the long-term future of iconic Grassroots Music Venues."

Their efforts include advocacy, technical assistance, and an annual conference, all aimed at achieving recognition that small/grassroots music venues are important cultural spaces, integral to the cultural life of London. They've authored two reports, "Understanding Small Music Venues" (March 2015) and "London's Grassroots Music Venues Rescue Plan" (October 2015) outlining challenges and offering solutions for small music venues struggling to stay afloat.

Individual music venues can join the Trade Association of the Music Venues Alliance (TAMVA), which offers technical assistance (with insurance, legal support, marketing, audience promotion, business planning, etc.). An Emergency Response Team advises venues facing threats (with an online form to request assistance). A new ticketing initiative, grassrootsvenues.tickets, launched in 2016, offering TAMVA membership to venues that sign on to use the ticketing service.

The Music Venue Trust is run by 1 full-time and 2 part-time staffers, and raising funds for their efforts remains challenging. After a recent application to Arts Council England was denied, they launched a fundraising campaign and concert, Fightback 2017.

Contacts

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Music Venue Trust, London

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APPENDIX A

The CAP Report: 30 Ideas for the Creation, Activation & Preservation of Cultural Space

Certify Cultural Space

1. Certify Buildings – certification for buildings with a certain % of total sf dedicated to cultural use (modeled after LEED certification, different levels based on points)
2. Certify People – also building on the LEED model, create a certification process (requiring attendance at sessions on topics related to cultural space development). Goal is to create a network of people with shared knowledge and goals. Much like architects want to be LEED-certified, development professionals will want Cultural Space Certification as a cachet
3. Brand Cultural Space – recognition and visibility (plaque, online map) to publicize certified buildings

Code Changes

4. FAR (Floor Area Ratio) exemptions to allow additional developable sf for projects that include cultural space

5. Allow height bonuses for developments that include cultural space

6. Allow rooftop cultural spaces (an addition to current allowable rooftop uses – mechanical, communication, play equipment)

7. Add cultural spaces to the list of required uses that facades on “pedestrian-oriented streets” must have (currently retail, restaurant, etc.)

8. Create (a more easily obtained) temporary occupancy permit for pop-up cultural events *Vancouver is a case study for this one!*

9. Reclassify art galleries in Seattle’s building code classification (currently Assembly classification, rather than Mercantile classification, which leads to more expensive building requirements)

Permitting Process

10. Streamline permitting process with incentives (modeled after current Green Building permit incentive program)

11. Add Arts Office staff representation to pre-application meetings between developers and city departments to raise awareness of cultural space issues

12. Link city-websites: Arts & Culture – with Department of Construction and Inspections – with Office of Planning and Community Development

13. Create Liaison in Department of Construction and Inspections, who is knowledgeable about city building requirements and cultural space needs and can help developers create cultural space

Older Buildings

Since the vast majority of Seattle’s cultural spaces are in older buildings, there is a need to address issues (upgrading to current building codes) that complicate cultural space use of historic buildings

14. Incentivize cultural uses in older buildings through technical assistance; prioritize funds to older buildings with cultural uses

15. Relax energy and plumbing code requirements for cultural space projects in older buildings (for non-life-safety aspects)

16. Offer technical assistance to navigate level of alteration requirements (making alterations more affordable, with less than full compliance – for non-life-safety requirements), on case by case basis

Technical Assistance

17. Compile document of funding sources, grants, incentives available for cultural space projects

18. Convene hyper-local, neighborhood cultural space panels (with members certified through Cultural Space program) to advise projects

19. Increase capacity of Cultural Space Liaison to match developers with cultural users

20. Research and share models and case studies (for example in San Francisco and Brooklyn)

21. Advocate for adding support for cultural space to city’s other certification programs (for example, add cultural criteria to the city’s Living Building Challenge)

Financial Tools

22. Reduce or waive permit fees for Certified Cultural Space projects (to minimize impact on city revenue, there could be a cap on amount of reductions allowed)

23. Advocate for increased financial support for development of cultural space; making the case for arts as investment in livable city

Public Policy

24. Create a Cultural Space PDA (Public Development Authority) to lease, develop, purchase real estate for the purpose of subleasing to cultural users at subsidized rates (with suggestions for where public funding might come from to supplement rental income). [PDA is quasi-public/municipal authority created to provide public services in more flexible ways than public sector – governed by volunteer councils, appointed by mayor, receive some public funding]

25. Require cultural space in developments over 5,000sf (which is threshold to require LEED gold certification) – cultural space required as a % of total sf

26. Advocate for culture to be included in neighborhood planning tools, using neighborhood-based cultural panels

Other Ideas that can't currently be pursued (because of conflict with state constitution, and other advocacy efforts) are included to recognize input received from community outreach efforts

27. Regulate Live/Work Spaces (live/work spaces created in mixed use developments are not being used as defined)

28. Tax incentives and exemptions

29. Modify land use code for Duwamish Manufacturing Center to allow cultural uses

30. Require cultural space in private buildings that displace cultural space

Appendix 4: Demographic Scan report



City of Vancouver

Demographic Market Scan Report

September 2015

AMS Planning & Research Corp.

Contents

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Introduction	I
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Demographic Details	3

Introduction

This report was prepared for the City of Vancouver as part of its review of performing arts facilities. It is intended to explore the current demographic profile of residents in the region and to aid in understanding the market context for performing arts facilities. The data were derived from 2011 Census and National Household Survey data provided by Statistics Canada. The following market areas were used in this analysis, and are compared with provincial and national-level figures:

- **City of Vancouver (Figure 1):** the primary focus area for the study, defined by the region of the Burrard peninsula west of Boundary Road, and excluding the campus lands of the University of British Columbia.
- **Vancouver Census Metropolitan Area (Figure 2):** the census-designated regional district inclusive of and surrounding the City of Vancouver.

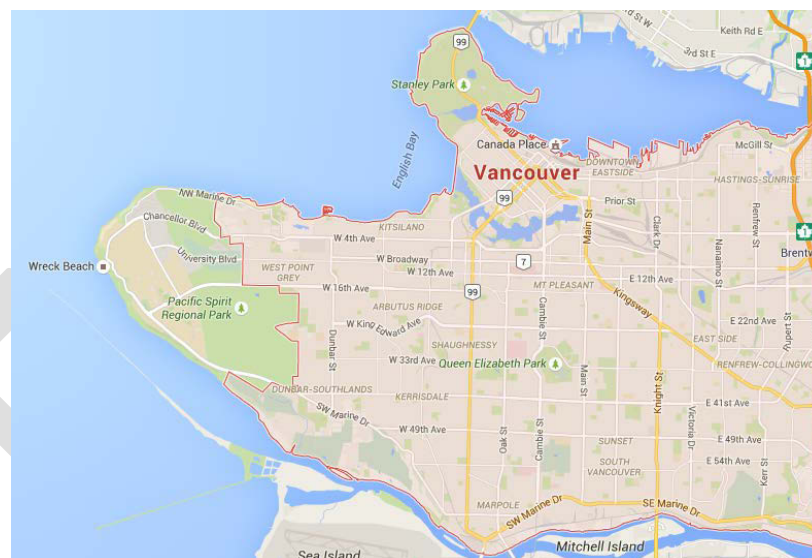


Figure 1 - City of Vancouver

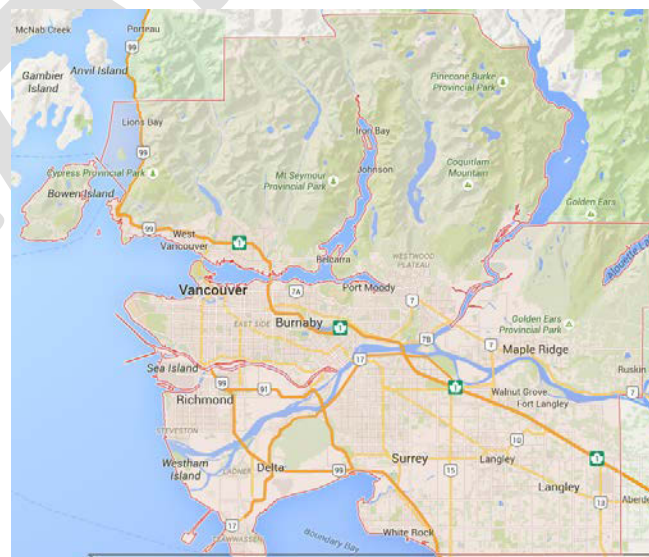


Figure 2 – Vancouver Census Metropolitan Area

Demographic Market Scan

Demographic Summary

The 2011 population in the City of Vancouver based on Census data is 603,502. The Vancouver Census Metropolitan Area has an estimated population of 2,313,328.

The 2011 number of households in the City of Vancouver is 264,573, and 891,336 in the Vancouver Census Metropolitan Area. This corresponds to their being 2.3 persons per household and 2.6 persons per household respectively, compared with the national figure of 2.5 persons per household.

An estimated 142,960 households in the City of Vancouver are family households, and 595,485 in the Vancouver Census Metropolitan Area.

The median age for the City of Vancouver is 39.7; the Vancouver Census Metropolitan Area median age is 40.2.

In the City of Vancouver, an estimated 16.4% of the population age 25 and over has earned a Master's Degree or higher and 27.4% has earned a Bachelor's Degree. In the Vancouver Census Metropolitan Area, an estimated 12.5% of the population age 25 and over has earned a Master's Degree or higher and 21.6% has earned a Bachelor's Degree.

The average household income in the City of Vancouver is estimated to be \$80,460 for the current year, and \$83,666 in the Vancouver Census Metropolitan Area.

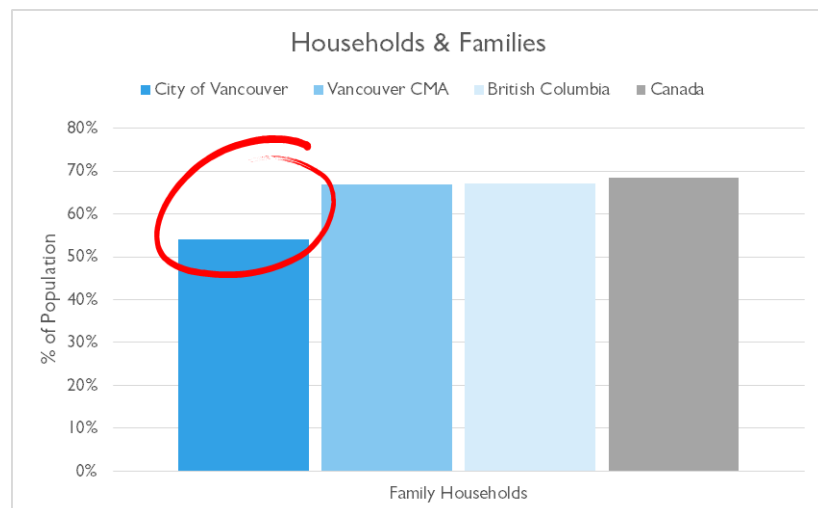
In the City of Vancouver, only 2.5% of individuals identify as being North American Aboriginal, and 2.8% in the Vancouver Census Metropolitan Area. 48.2% of City of Vancouver individuals (and 54.8% in the Vancouver Census Metropolitan Area) identify as White. The remainder of the population of the City of Vancouver is predominantly of Asian origin (47.6%), of which 27.7% identify as Chinese.

Demographic Snapshot

Primary Market: City of Vancouver
Secondary Market: Vancouver CMA

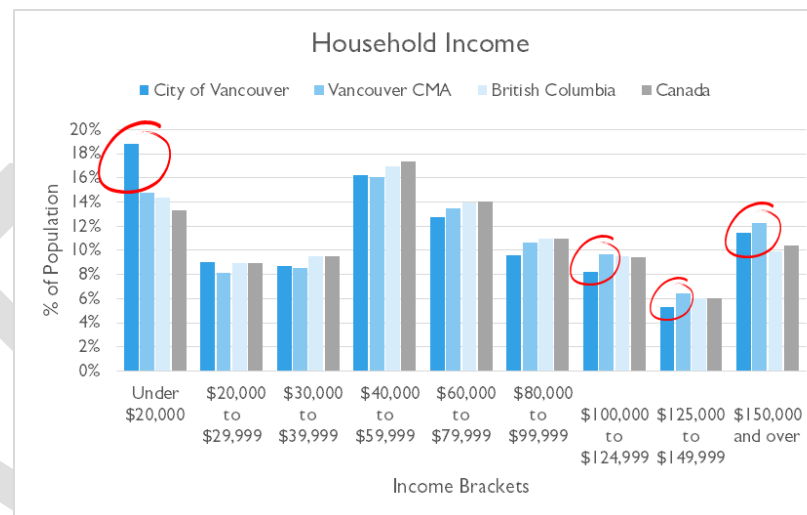
	City of Vancouver		Vancouver CMA		British Columbia	Canada
Population						
2011 Census	603,502		2,313,328		4,400,057	33,476,688
Households & Families						
2011 Census Households	264,573		891,336		1,764,637	13,320,614
Family Households	142,960	54.0%	595,485	66.8%	67.0%	68.3%
Population by Age						
Under 5	24,770	4.1%	115,185	5.0%	5.0%	5.6%
5 - 17	63,415	10.5%	325,200	14.1%	14.1%	15.0%
18 - 24	56,545	9.4%	218,340	9.4%	8.9%	9.2%
25 - 44	208,670	34.6%	671,855	29.0%	26.3%	26.4%
45 - 64	168,165	27.9%	669,845	29.0%	30.0%	29.1%
65 and Over	81,930	13.6%	312,905	13.5%	15.7%	14.8%
2011 Est. Median Age	39.7		40.2		41.9	40.6
Population (Age 25+) by Education Attainment						
Bachelor's Degree	101,535	27.4%	287,230	21.6%	17.3%	16.5%
Master's Degree or Higher	60,035	16.2%	166,660	12.5%	9.9%	9.4%
Household Income						
2015 Est. Average Household Income	\$80,460		\$83,666		\$77,378	\$79,102
2015 Est. Median Household Income	\$56,113		\$63,347		\$60,333	\$61,072
Population North American Aboriginal						
North American Aboriginal	14,675	2.5%	64,945	2.8%	6.2%	5.6%
Population Race Class						
White	284,590	48.2%	1,250,360	54.8%	72.7%	80.9%
Black	5,720	1.0%	23,545	1.0%	0.8%	2.9%
Chinese	163,230	27.7%	411,470	18.0%	10.1%	4.0%
Asian (Non-Chinese)	117,220	19.9%	534,360	23.4%	14.7%	10.2%
Latin American	9,595	1.6%	29,125	1.3%	0.8%	1.2%
Other and Multiple Visible Minorities	9,855	1.7%	31,835	1.4%	0.9%	0.8%

Demographic Details



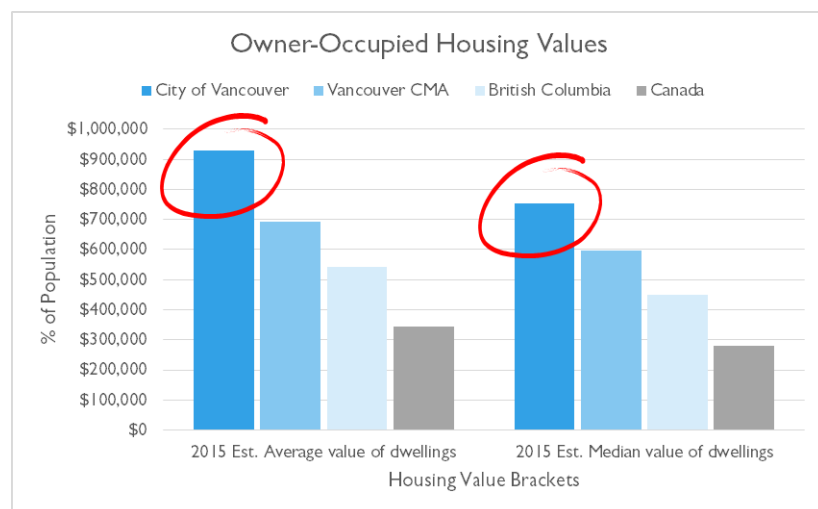
The City of Vancouver is lower than British Columbia and Canada in terms of percentage of family households (households with one or more persons related by birth, marriage, or adoption). However, the Vancouver Census Metropolitan Area has a similar percentage of family households.

In the City of Vancouver, 54.0% of households are family households, comparable to 66.8% in the Vancouver Census Metropolitan Area, 67.0% in British Columbia and 68.3% in Canada.



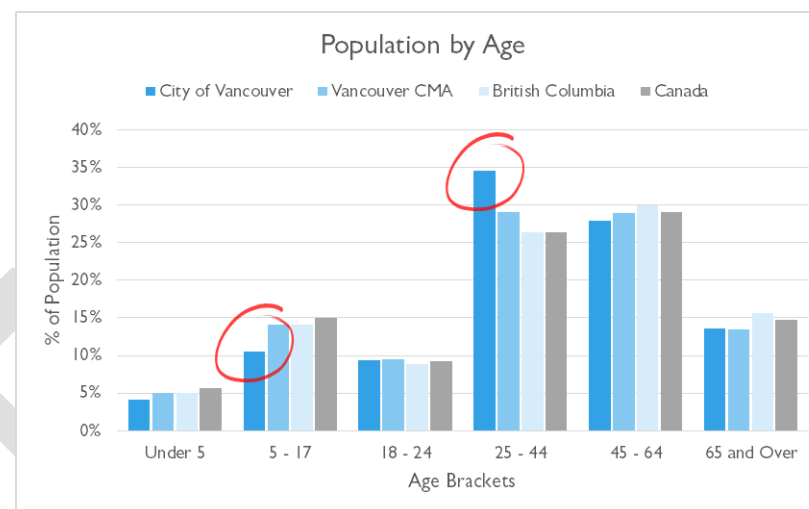
The City of Vancouver is more affluent overall, but with a significantly higher proportion of low income households. However, high average incomes suggest income inequality in the region.

18.8% of households in the City of Vancouver have household incomes less than \$20,000 compared to 14.8% of households in the Vancouver Census Metropolitan Area. Despite this, the average household income is \$80,460 in the City of Vancouver, \$83,666 in the Vancouver Census Metropolitan Area, \$77,378 in British Columbia and \$79,102 in Canada. The median household income is \$56,113 in the City of Vancouver, \$63,347 in the Vancouver Census Metropolitan Area, \$60,333 in British Columbia and \$61,072 in Canada.



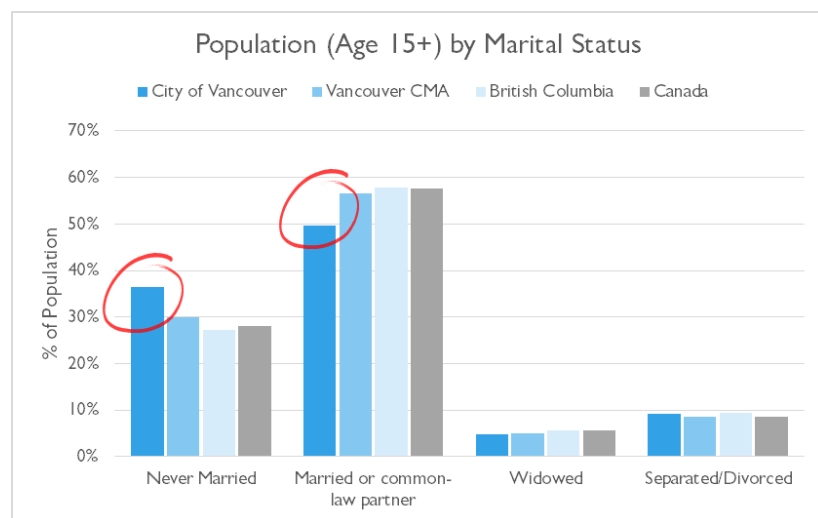
Housing values in general are much higher than the national figures, with a higher concentration of high value homes in the City of Vancouver. This further suggests a higher than average level of inequality.

The average and median dwelling values in the City of Vancouver are \$929,049 and \$752,016 respectively, in contrast with \$691,550 and \$598,095 in the Vancouver Census Metropolitan Area. In British Columbia the average and median dwelling values are \$543,635 and \$448,835 respectively, and \$345,182 and \$280,552 in Canada.



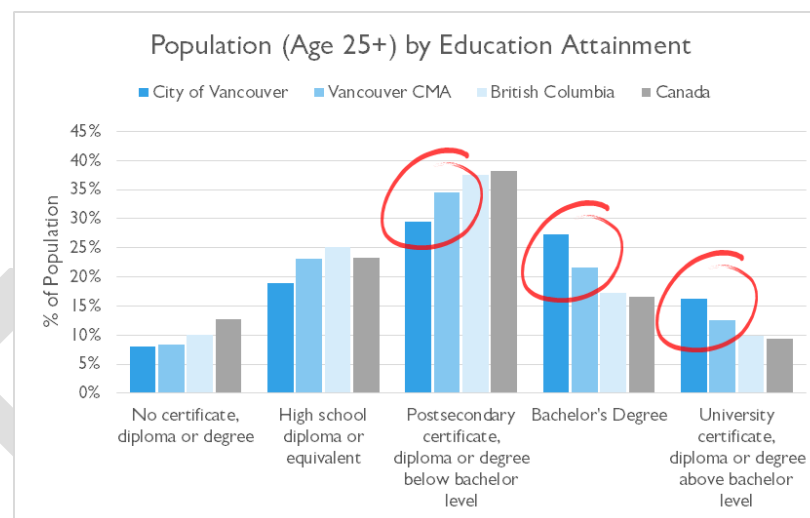
In the City of Vancouver, the age distribution is marked by a higher proportion of young adults and low numbers of school-age children. The Vancouver Census Metropolitan Area more closely reflects national figures.

In the City of Vancouver, 39.7 is the estimated 2011 median age, compared to 40.2 in the Vancouver Census Metropolitan Area, 41.9 in British Columbia and 40.6 in Canada.



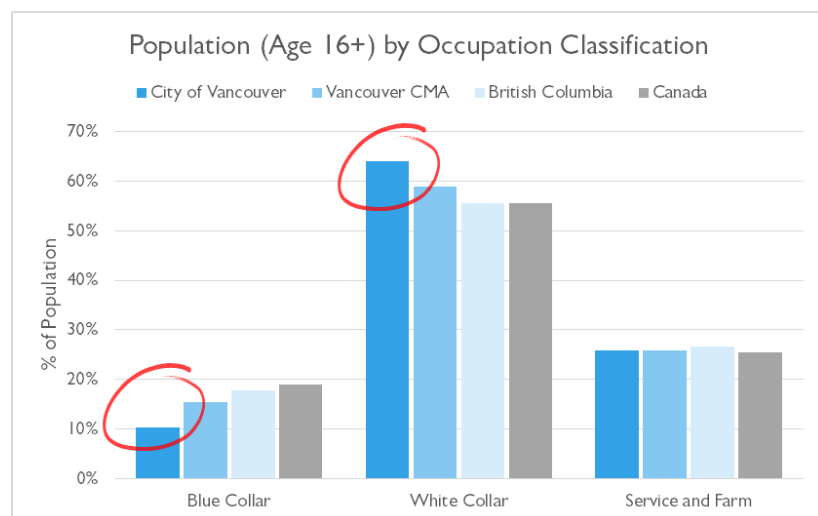
The marital status of the population in the Vancouver Census Metropolitan Area is similar to that of Canada, but the City of Vancouver has a higher unmarried population, again reflecting this younger demographic.

In the City of Vancouver, 49.6% of population (age 15+) is married, compared to 56.5% in the Vancouver Census Metropolitan Area, 57.9% in British Columbia, and 57.7% in Canada.



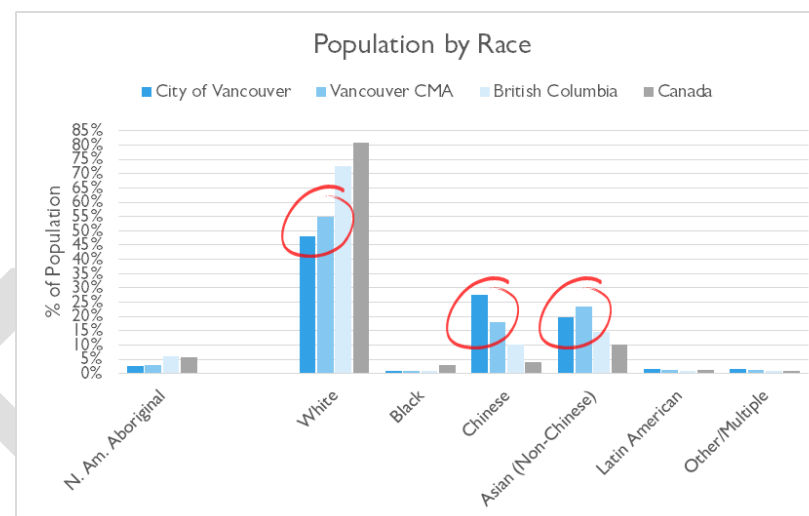
In the City of Vancouver as well as the Vancouver Census Metropolitan Area, the population is more likely to have attained higher levels of education, and a higher proportion have not completed high school.

43.6% of the population (age 25+) in the City of Vancouver have attained a Bachelor's Degree or higher, compared to 34.1% in the Vancouver Census Metropolitan Area, 27.3% in British Columbia and 25.9% in Canada.



The City of Vancouver population is significantly more likely to work in “White Collar” occupations.

64.0% of the population (age 16+) in the City of Vancouver hold an occupation classified as “White Collar,” compared to 58.9% in the Vancouver Census Metropolitan Area, 55.5% in British Columbia and 55.6% in Canada.



A smaller portion of the City of Vancouver population identifies as North American Aboriginal compared to the British Columbia and Canadian populations. In the City of Vancouver, there are a high number of people identifying as Chinese as compared to other regions, with Non-White residents being in the majority. The proportion of Non-Chinese Asians is higher than Chinese in the Vancouver Census Metropolitan Area.

In the City of Vancouver, 48.2% of the population identify as White, compared to 54.8% in the Vancouver Census Metropolitan Area, 72.7% in British Columbia, and 80.9% in Canada.

In the City of Vancouver, 27.7% of the population identify as Chinese, compared to 18.0% in the Vancouver Census Metropolitan Area, 10.1% in British Columbia and 4.0% in Canada.

Appendix 5: Performing Arts Gap Analysis

Review of **Performing Arts Facilities** City of **Vancouver** BC

Gap Analysis Workshop
6 May 2016

Updated 11 May 2016

Today's Objectives

- * Review situation analysis**
- * Review peer studies**
- * Identify & discuss gaps**
- * Confirm next steps**

Study Purpose

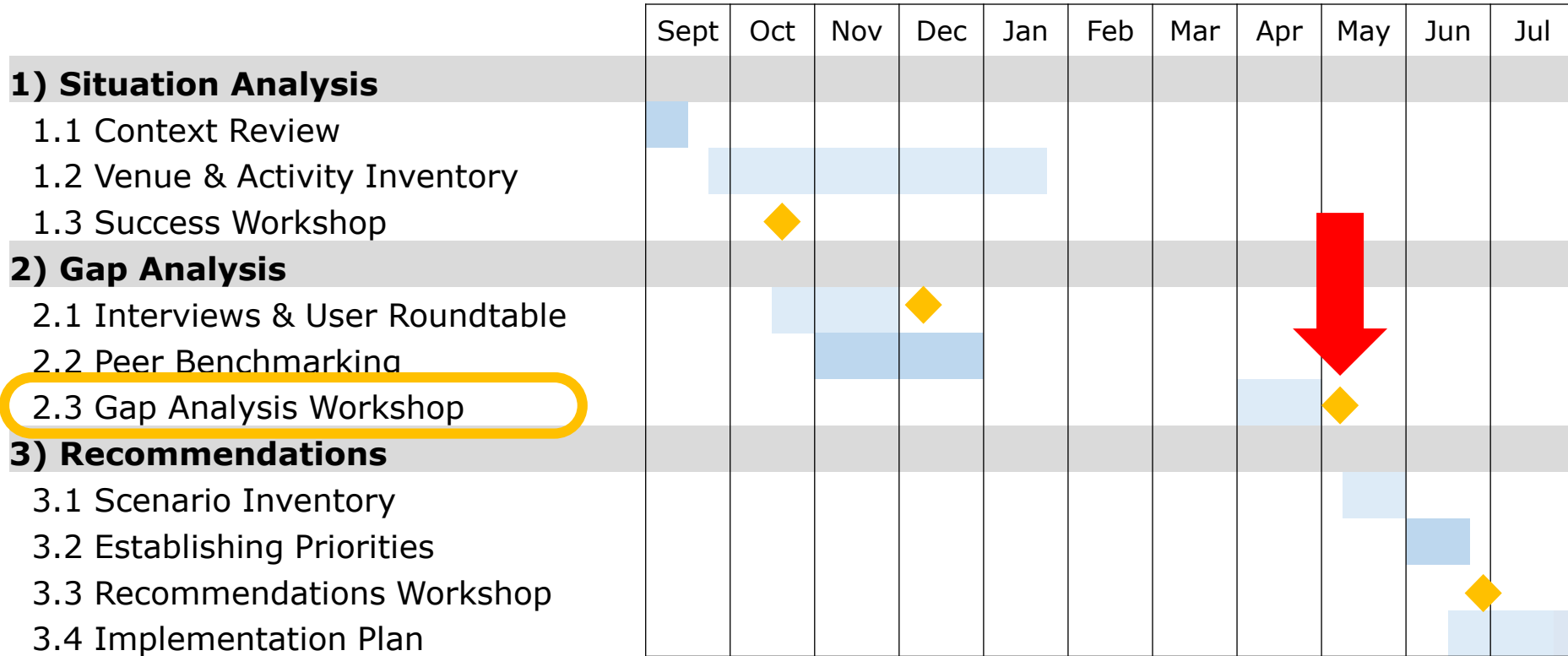
*"To determine the **current venue capacity** for performing art spaces within the city **with a view to the future.**"*

*"to evaluate the **supply and demand gap** for performing arts venues in Vancouver."*

*"Determine current **challenges and opportunities** for **creative organizations.**"*

*"To **inform decision-making** related to the operation of **new and existing venues** including any **renovation or new construction** costs that are being considered."*

Schedule



◆ on site meeting or workshop

Defining Success

Inventory	Gap Analysis	VCT	Rec's
<ul style="list-style-type: none">• Participation of large organizations• ID need for mid-sized venue• Geographic distribution & relation to transit, density, real estate cost• Competitive environment• Major project plans	<ul style="list-style-type: none">• Audiences served and trends• Leadership issues• Holistic view of needs• Need for vision• Connection to Vancouver's brand/identity	<ul style="list-style-type: none">• Comparison with peer cities, including a Canadian city• Peer PAC roles – Landlord/Host/Presenter• Subsidy levels & sources• Resident org relations• Peer cities contacts: providers, staff, electeds	<ul style="list-style-type: none">• Prioritization• Partnership & Collaboration – specific recs• Capital Rotation for VCT maintenance funding• Role – enabler vs doer

Process Highlights

- Background Review
- Venue Mapping
- 25+ Leadership Interviews
- 2 User Roundtables
- User and Operator Survey – 123 Responses (51% - All Majors)



Situation Analysis

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Market Context

Strong arts-demand indicators:

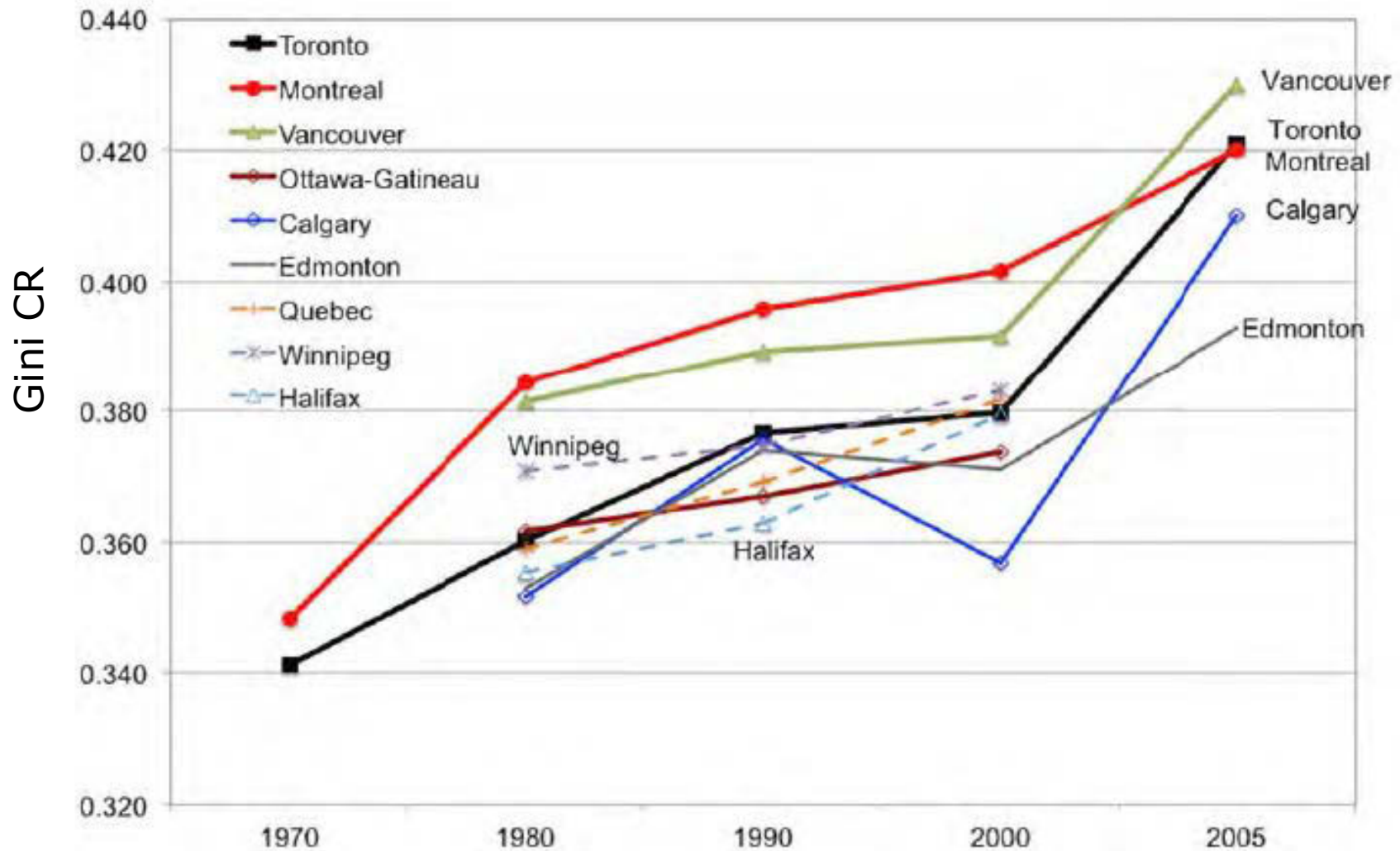
- Young population: almost 35% are 25-44
- Highly educated: >43% hold bachelor's degree or higher
- Diverse populations: >51% non-white (<20% in Canada)

But: pressure on artists & arts organizations:

- Income inequality: high and low incomes over-represented
- Costly housing: average owner-occupied value: \$929k
- Weak provincial arts funding: low relative to other provinces

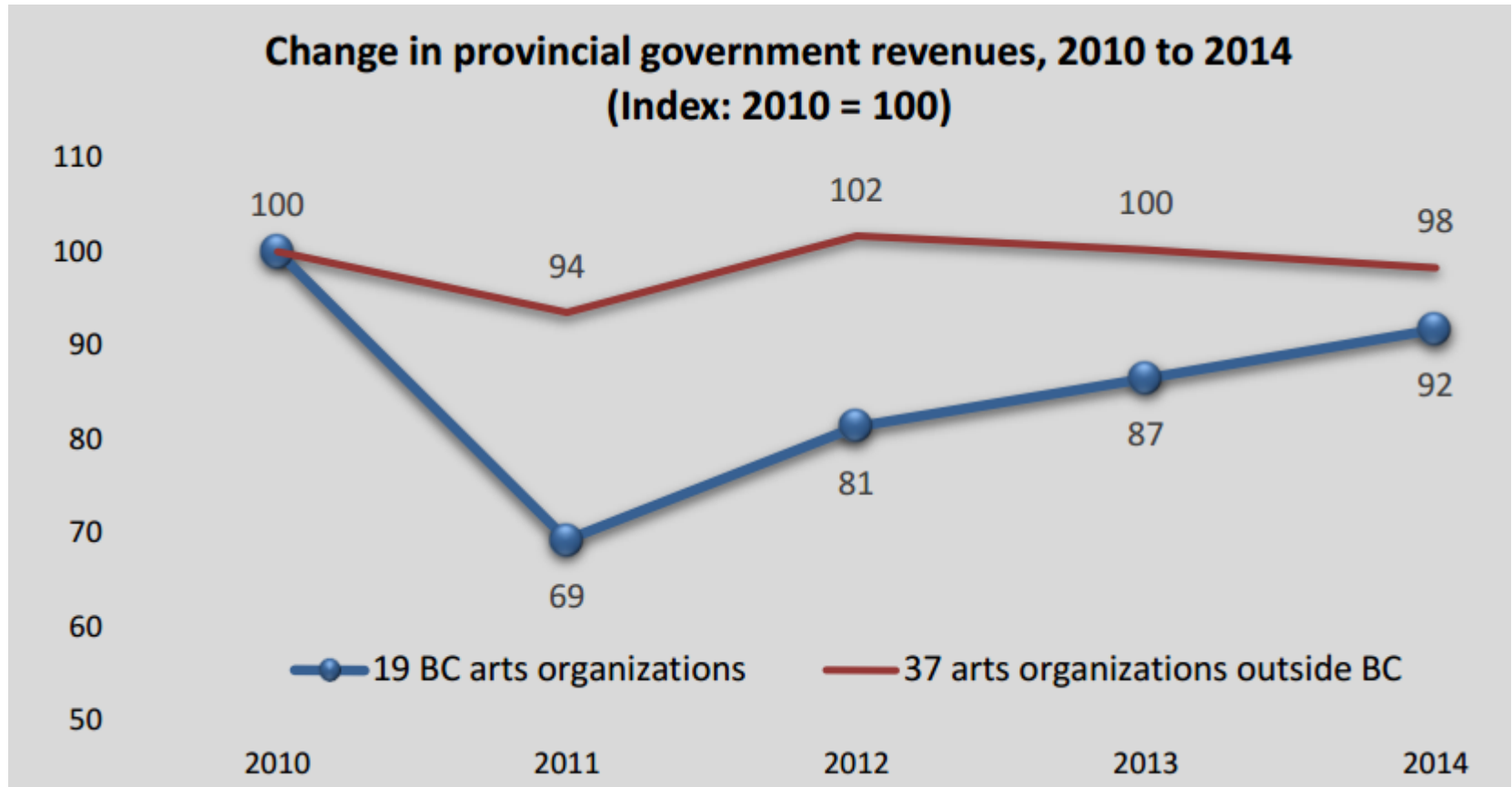
Income inequality is increasing rapidly in Vancouver.

Figure 7: Gini CR index of household income inequality, selected CMAs



Source: Walks, Alan. Income Inequality and Polarization in Canada's Cities. U of Toronto 2013.

Provincial arts funding in British Columbia has not recovered to pre-recession levels.



Source: Hill Strategies:

http://www.hillstrategies.com/sites/default/files/Alliance2_funding_comparisons.pdf

Performing Arts Ecosystem

- Great quantity and quality of **small, artist-driven organizations**
- **Grassroots artistic energy and innovation** has become a part of the city's performing arts identity.
- City (and others) are helping drive **more diversity** in the performing arts.



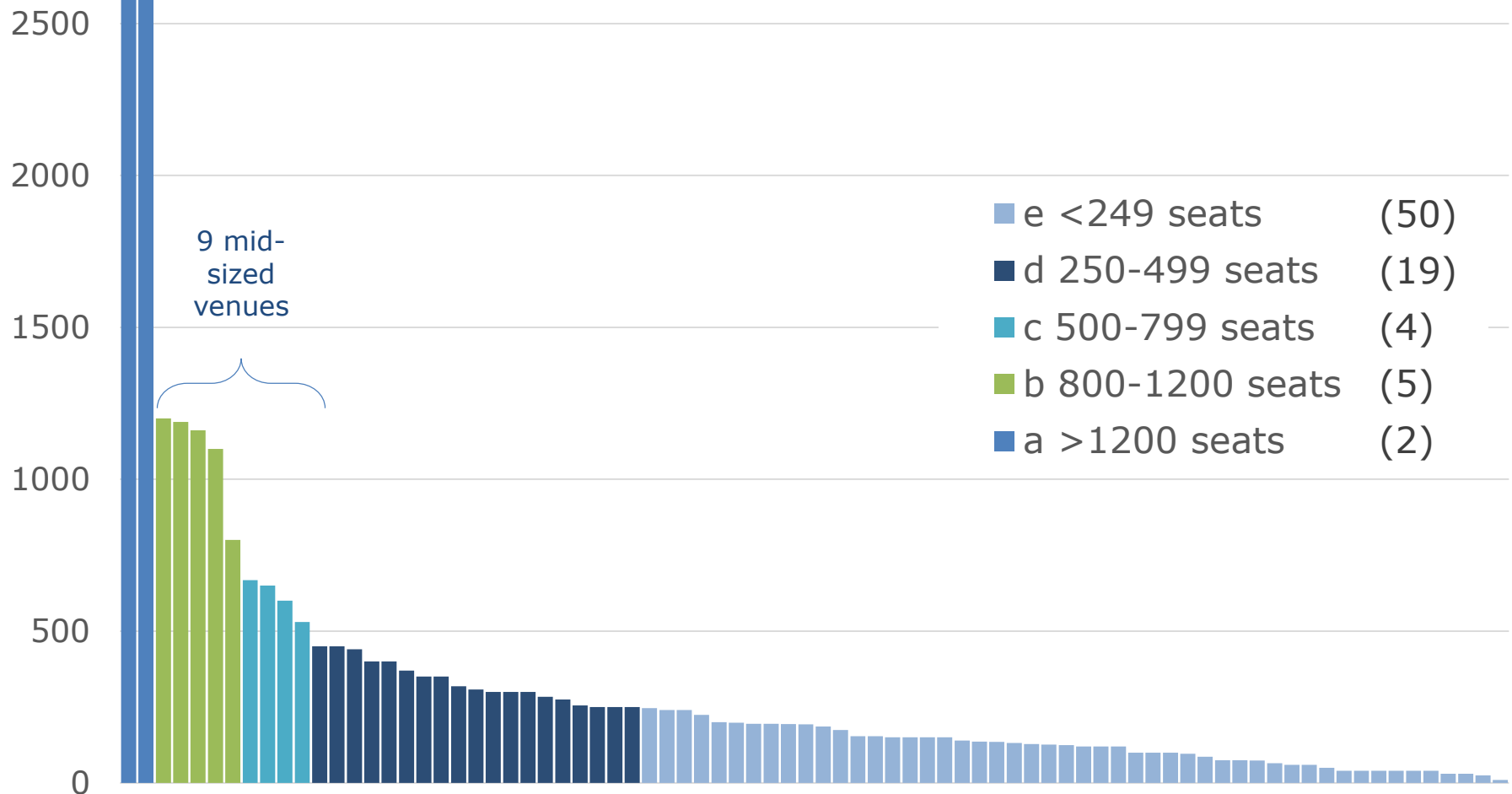
Source: leadership interviews

Performing Arts Ecosystem

- **Most organizations operate with budgets <\$500k.**
- These smaller organizations report **difficulty building capacity** to grow; to some, the 'ecosystem' feels unbalanced.
- Performing arts organizations of all sizes feel **under-capitalized.**
- **Low provincial funding support** was noted consistently.
- Corporate and **philanthropic funds not easily accessible**

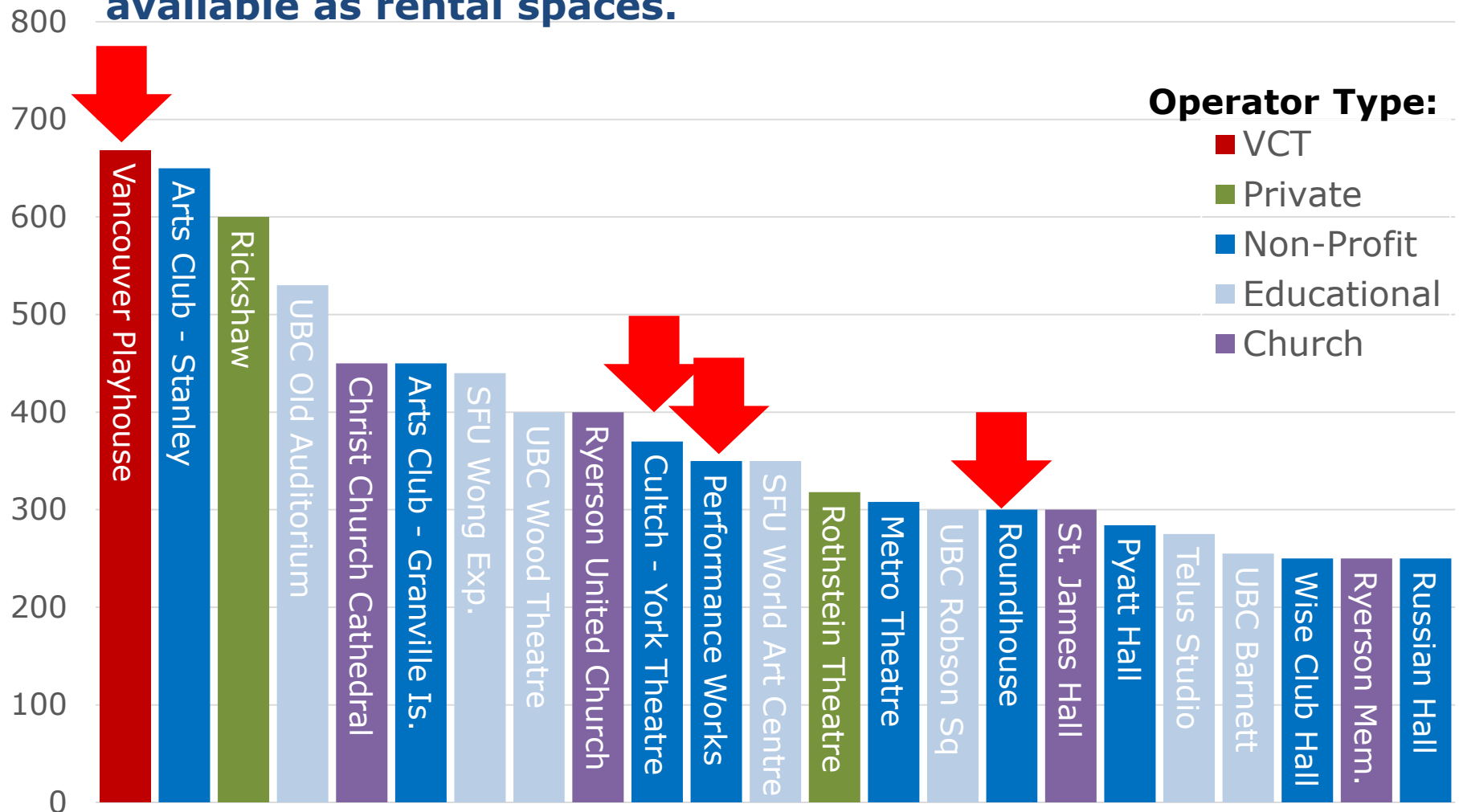
Performing Arts Venues

Of the 126 venues inventoried, 80 venues are indoor spaces used for live performance. **There are relatively few mid-sized venues.**

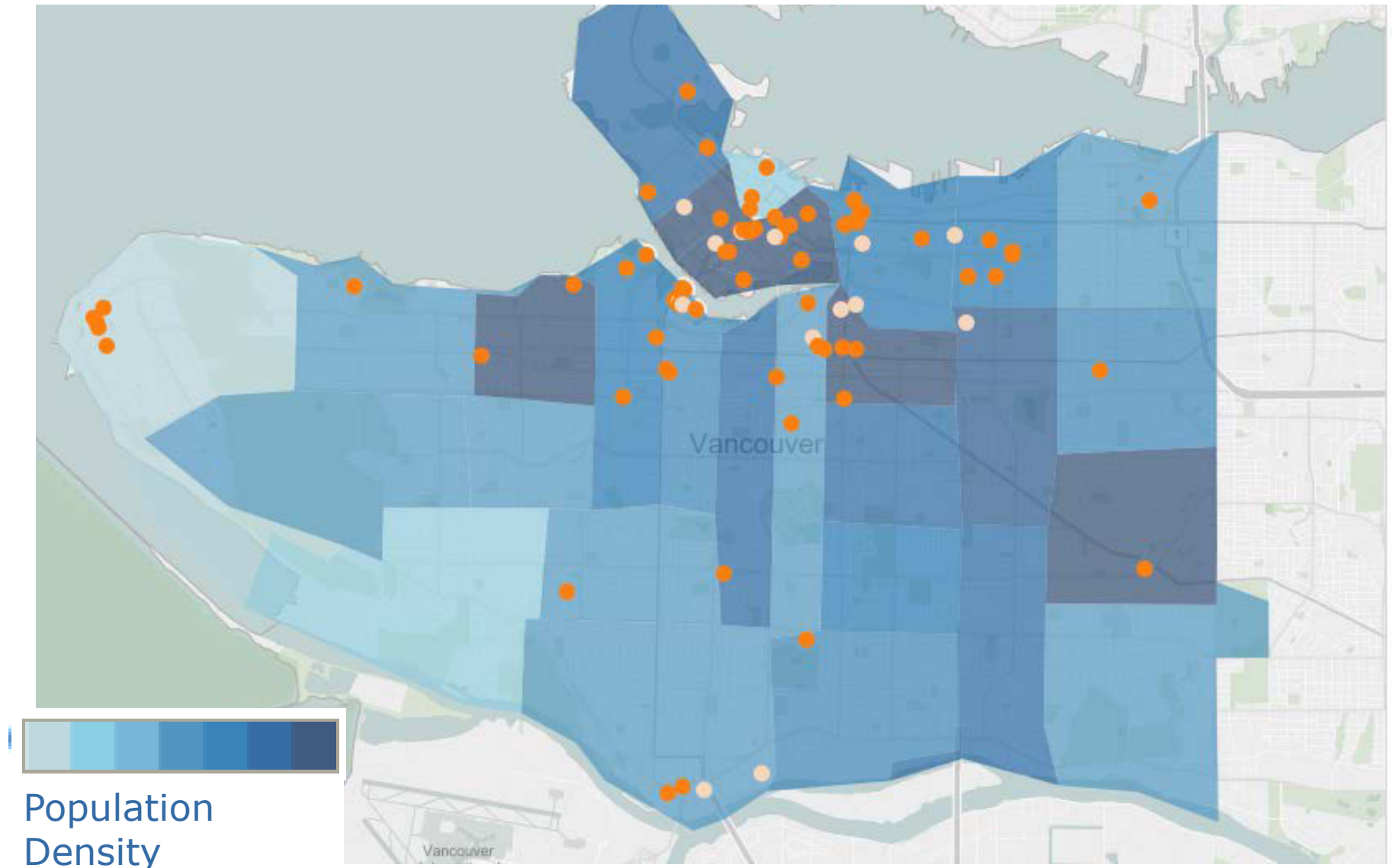


Mid-Sized Venues

Among these mid-sized venues, many are educational venues or are controlled by producing organizations. **Few are consistently available as rental spaces.**



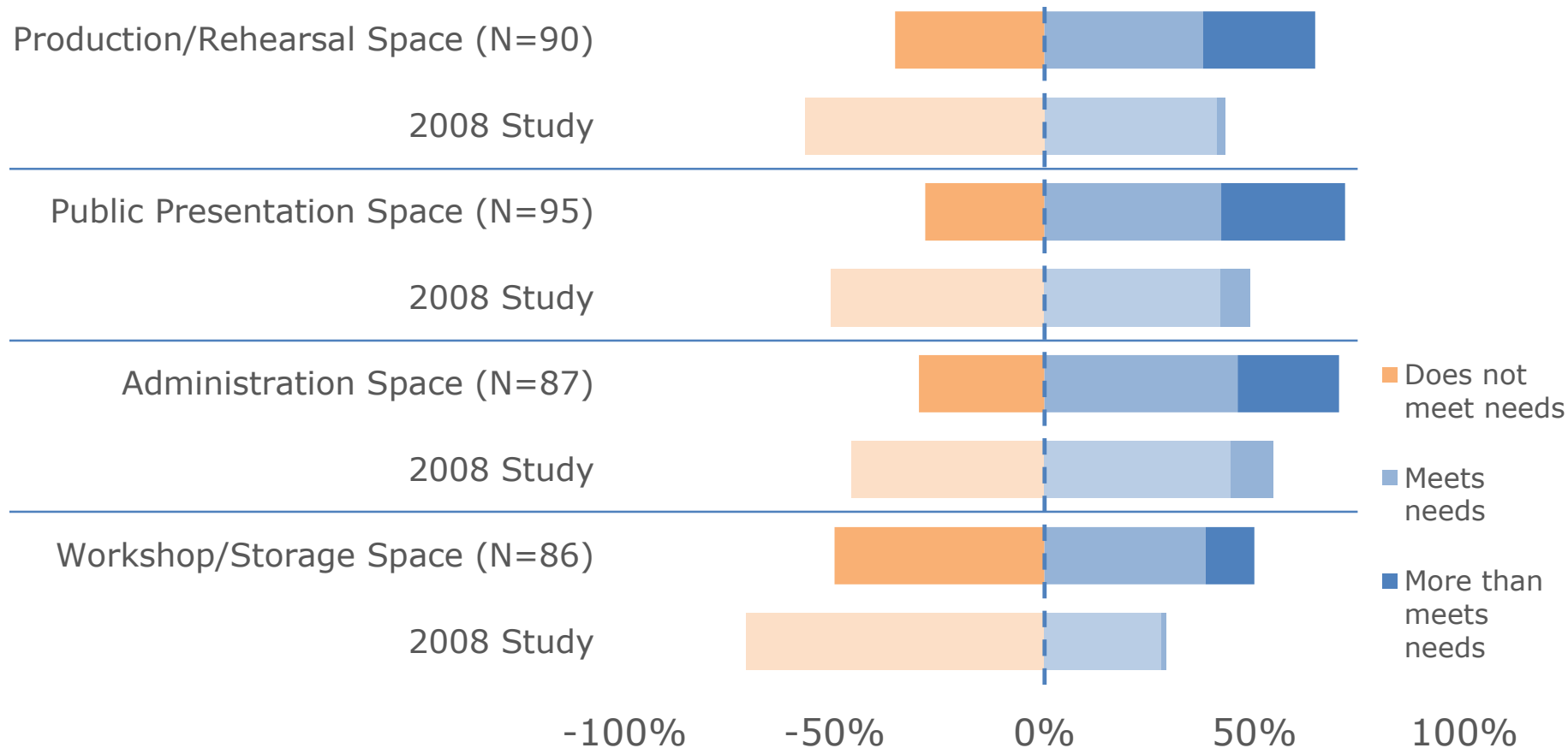
Performing arts venues are concentrated where **population is the most dense.**



Condition & Satisfaction

Satisfaction with venue function is **significantly improved** since 2008.

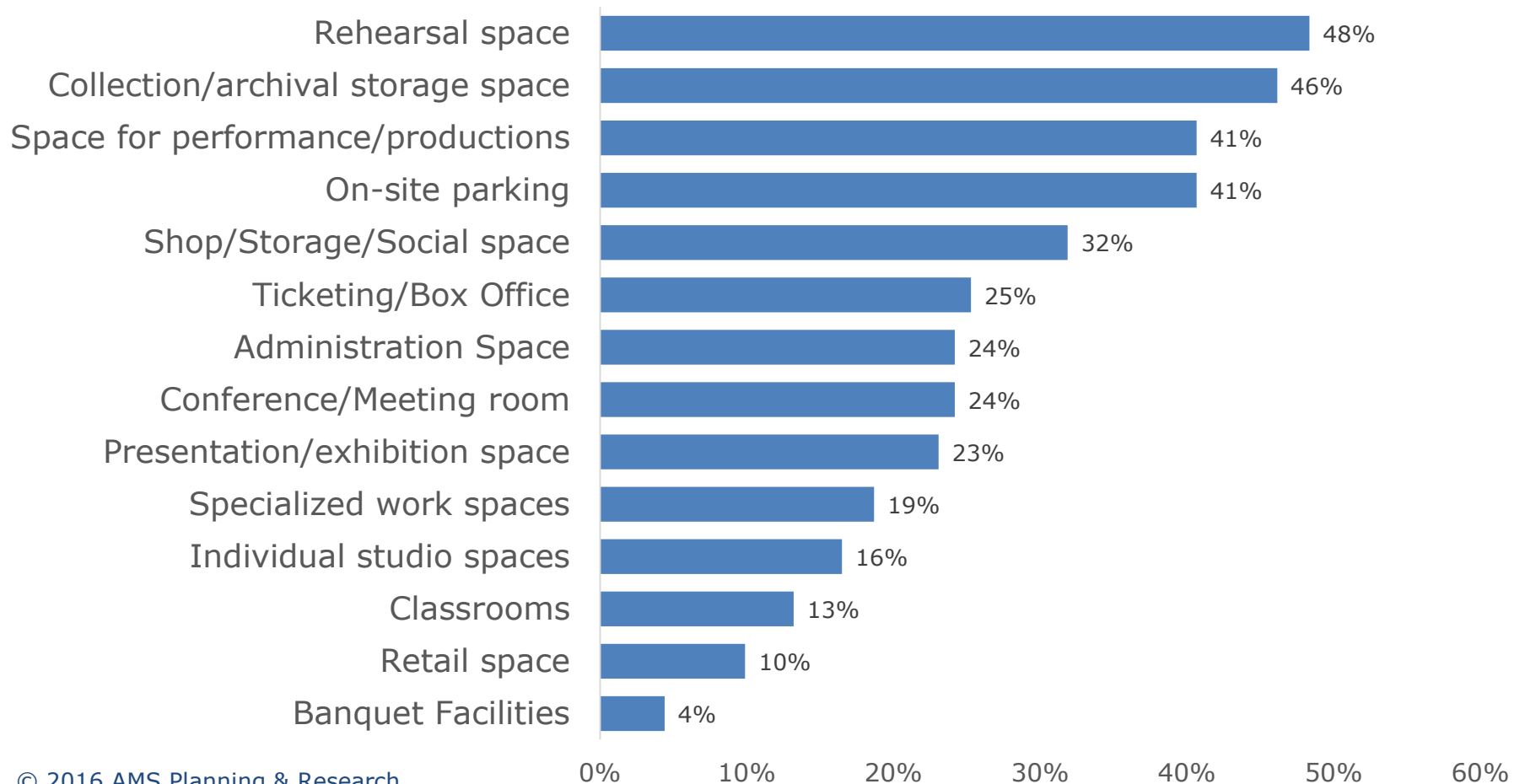
Please rate the general state or condition of the following types of facilities that your organization uses in Vancouver:



Availability

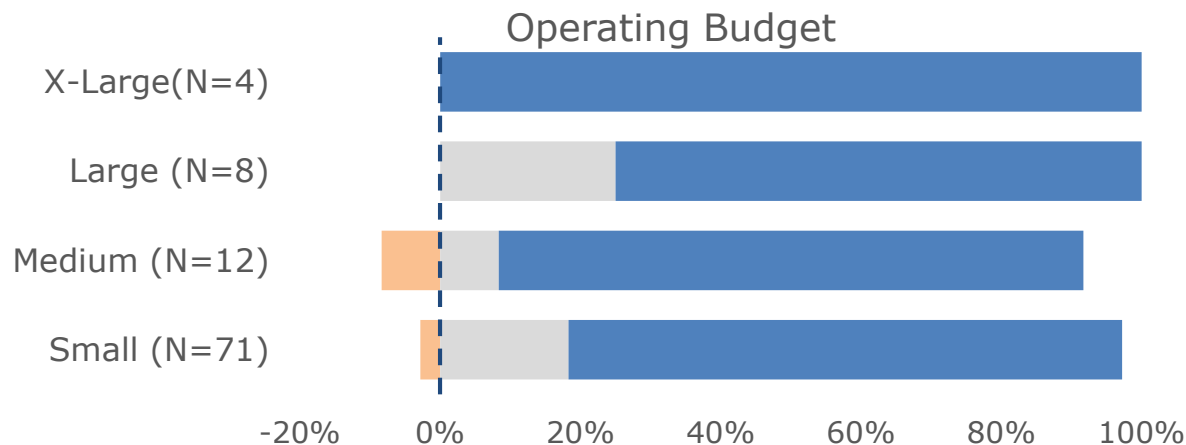
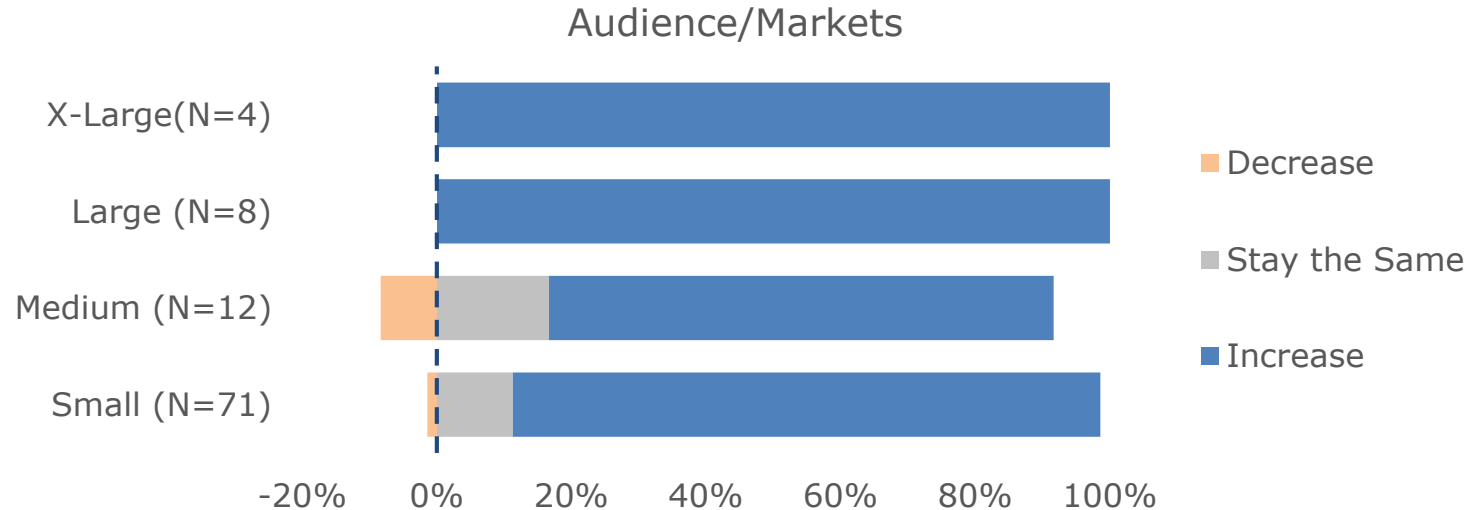
Nearly **half of venue users felt that rehearsal space and storage space** are under-supplied in Vancouver.

Which of the following types of space do you feel are missing?
(N=91)



Looking ahead

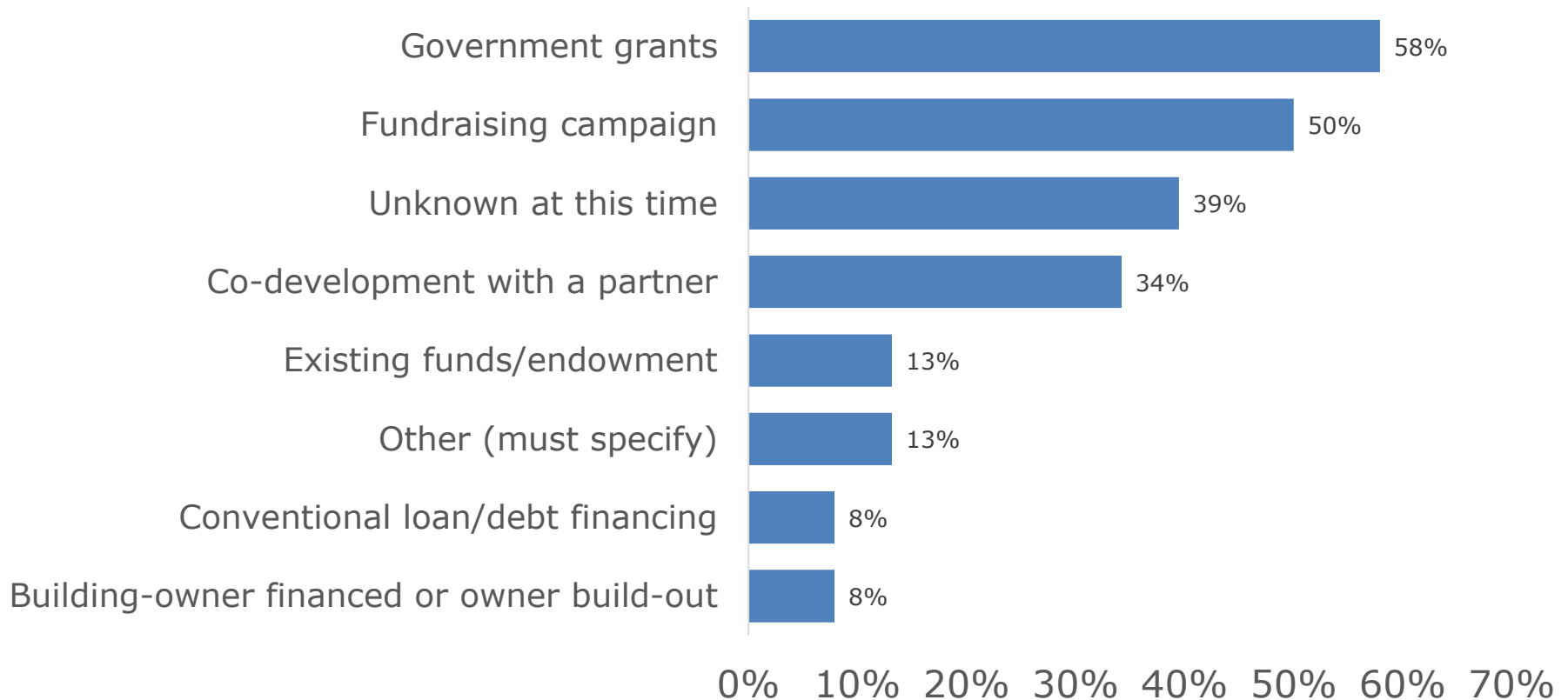
Respondents were **extremely optimistic** about the future of their organizations, **anticipating increases** in all aspects of their operations.



Looking Ahead

Of the organizations that are considering expansion or relocation, **most intend to seek government grants**, and half plan to undertake fundraising.

How does your organization intend to fund its expansion/relocation? (N=38)



The City's Role

- Performing arts organizations think **the City has done a good job** distributing funds and supporting the performing arts.
- Access to grants requires **capacity to deal with bureaucracy**; new/small organizations have a **hard time accessing funds**, which flow to 'usual suspects.'
- Community Amenity Contributions program has **resulted in some successes, but:**
 - Some spaces have been built 'on spec' without user input
 - Groups unclear about how to 'get in' on this process.

The City's Role

- There is a perceived **lack of clarity** about the city's **decision-making process around facilities**.
- Quantity of City-owned venues has created the **expectation that it's the City's responsibility** to provide space for the arts.
 - Perceived lack of drive among organizations to control own facility.
 - A perceived lack of arts leaders stepping up to champion new projects.
- Many believe the City's role could be **most effective as a matchmaker/facilitator** rather than as a primary provider of facilities.
 - As a provider it can be difficult to make decisions that are perceived as 'fair'.
 - There is no organization that can play the role of connecting activity to space across the City.



VCT Benchmarking

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Peer Venues

	Venue Operator	Population		venues	Total Seats	Operating Expenses
		City	MSA			
ArtsCommons	Nonprofit	1,097,000	1,214,839	6	3,393	\$10.9m
Toronto Centre for the Arts	Nonprofit	2,615,000	6,054,191	3	2,963	\$21.1m
Portland'5	Metro Portland	609,456	2,226,009	5	7,194	\$11.8m
Mesa Arts Center	City of Mesa	457,587	4,490,000	4	2,436	\$10.4m
VCT	City of Vancouver	603,500	2,313,328	4	6,226	\$9.3m



Peer Studies

*How have peer cities addressed gaps in
performing arts infrastructure?*

Selection Criteria

Cities similar to Vancouver in terms of . . .

***Population**

***Diversity**

***Education**

***Known center for arts and culture**

Selection Criteria

	Vancouver	Austin	Boston	Brisbane	Calgary	Minneapolis-St. Paul	Nashville	Portland	San Francisco	Seattle
MSA Population	2.5m	1.9m	4.6m	3.4m	1.2m	3.4m	1.8m	2.3m	4.5m	3.7m
% Immigrant Pop.	45.1%	18.6%	26.5%	29.7%	26.2%	16.5%	11.9%	13.8%	35.6%	17.7%
% Visible Minority Pop.	45.2%	31.7%	46.1%		28.1%	38.0%	39.5%	23.9%	46.2%	31.5%
Cultural Hub	x	x	x	x	X	x	x	x	x	x
% population with Bachelor's Degree or higher	43.6%	45.6%	43.9%		34.8%	42.0%	35.3%	43.8%	52.4%	57.4%

Peer City Themes

- * Arts and creativity appear in **civic vision and goals**, providing opportunity for relevant advocacy
- * **Mayor and Council's interest in the arts** enables action
- * Each city has **major performing arts destination**
- * Rapid urban development associated with **displacement of grassroots performing arts space**
- * Service organizations & **initiatives increasingly dealing with cultural space issues**

Civic Vision

Vancouver: Council Priorities:

- Housing and homelessness
- Safety, inclusion, and creativity (social services)
- Economic development
- Greenest city
- Value for money

Provide few 'entry points' for arts and culture, much less the performing arts specifically. All the peer cities include creativity, quality of life, or innovation in their civic success statements.

As a result, performing arts organizations feel they don't have a seat at the table.

Service Initiatives

Each peer city has **coordinated service initiatives** focused on addressing the space needs of arts organizations. The “Spacefinder” matchmaker apps have been particularly effective for grassroots organizations.

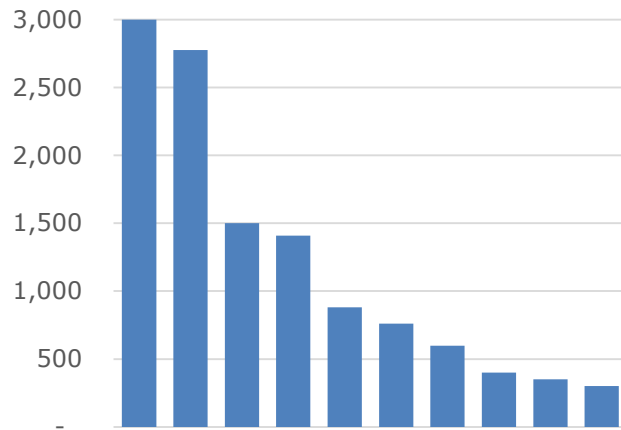
- **Calgary**
 - Calgary Arts Development Authority (CADA)
- **Brisbane**
 - Creative Spaces
- **Seattle**
 - Spacefinder App
 - City Cultural Space Liaison
 - City and County infrastructure funding
- **Portland**
 - RACC

Major Venues

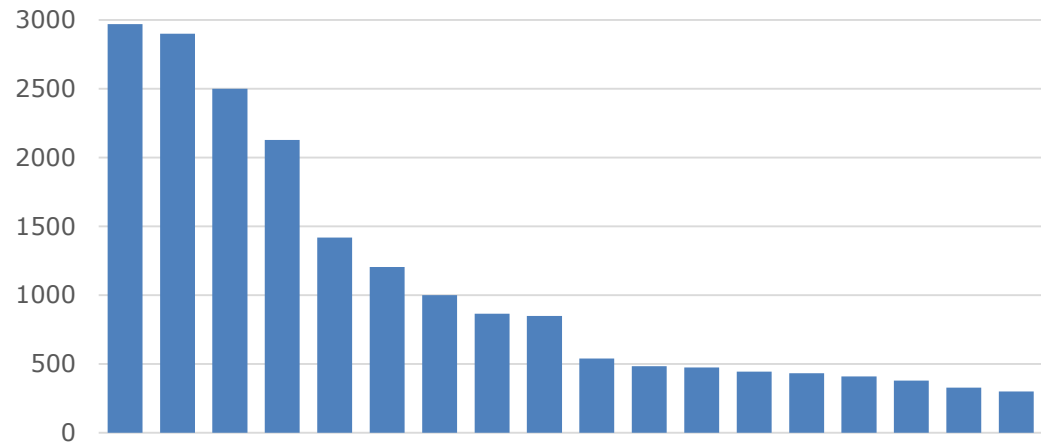
Indoor, non-church venues by capacity, >300 seats
Source: AMS database

Vancouver, like Calgary and Portland, has a **significant gap between its largest venues** and those under 1,000 seats.

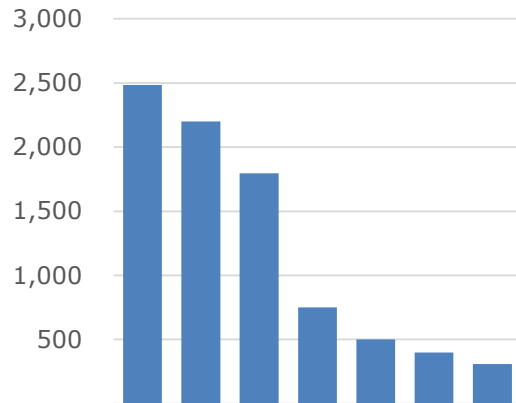
Portland



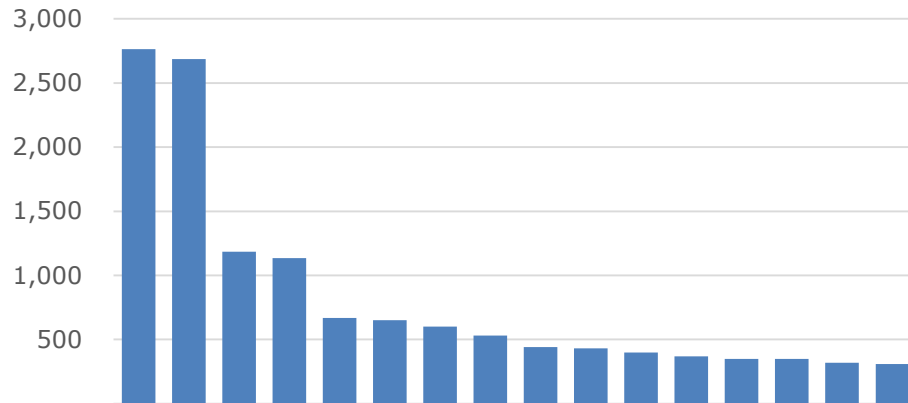
Seattle



Calgary



Vancouver



Performing Arts Centers

Calgary and Brisbane both have traditional performing arts centers; Portland and Seattle have different models. Each city has a **signature collection of major arts venues** with **active management**.

Calgary: ArtsCommons role and mission is to be a host to resident and emerging groups.

Portland: Portland's Centers for the Arts' recently shifted from 'landlord' to 'host' and welcomes a of diverse groups. They have a new emphasis on presenting and taking risk to best serve the region

Brisbane: QPAC has recently shifted its management from traditional departments to matrix operations, and is planning a large expansion.

Seattle: Major venues are more spread out – Seattle Center has broader mission as cultural campus; STG, Benaroya, ACT, other venues bring vibrancy downtown.

Common challenges

- * **Political climate** influences large and small-scale cultural investment
- * Concern with '**big**' **civic problems** – homelessness, transportation, etc. – displaces concern for performing arts infrastructure
- * Communication and collaboration between arts groups could be improved – **siloing still exists.**
- * **Weakness in convening / coordinating** performing arts groups – lack of strong entity with this role (except Calgary)



Key Gaps

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Gap Categories

***Infrastructure**

What kinds of spaces are needed to better serve the performing arts in Vancouver?

***Ecosystem**

What may be missing in Vancouver's performing arts scene?

***Enabling Factors**

What other gaps exist in Vancouver's ability to effectively address performing arts infrastructure?

Infrastructure Gaps

Perceptions

- A 1200-1800 seat 'lyric hall' is many peoples first response
- Small and mid-size music groups cite lack of space designed for unamplified music.
- Affordable space is a priority for performing arts organizations of all scales.

Infrastructure Gaps

Observations

- Though a 1200-1800 seat lyric hall has been discussed frequently over the years, the need for more performance space in this range is not clear-cut.
- The Orpheum's location and reputation make it a valuable civic asset. Could it be adapted to better serve the Symphony?
- Mid-scale venues are in short supply; coordinated proposals for spaces in the 250-800 seat range should be considered.
- Spaces appropriate for unamplified music are in short supply.

Infrastructure Gaps

Observations

- Scene shop, storage, and workspace is in short supply.
- Several co-ops coming online for shared office, some rehearsal space, but shops limited to a few for-profit providers.
- Several recently-opened venues will improve the availability of rehearsal space.
- Vancouver does not have an online cultural space 'matchmaker' portal, which could help awareness about space availability/affordability.
- No large-scale outdoor concert venue exists in Vancouver.

Ecosystem Gaps

- Largest organizations have undergone recent leadership transitions, and vary in terms of institutional health.
- Some practices, such as Theatre Rental Grants, have appeared to favor larger 'legacy' organizations.
- Smaller organizations report difficulty accessing the resources they need to grow to the next level, including space, money, and visibility.

Enabling Factors Gaps

- Organizations lack convening forum or entity.
- Leaders not well connected to each other and to city decision-makers
- City's focus on environmental sustainability does not prioritize creative issues
- Arts leaders feel closed out of City process
- City as landlord in tension with city as enabler of arts activity (at VCT and elsewhere)
- Infrastructure funding decisions perceived as lacking transparency



Next Steps

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Next Steps

* **Scenario Inventory**

What actions might help address the gaps identified?

* **Establishing Priorities**

Which gaps are most important to address? How might the City choose between possible actions?

* **Recommendations Workshop**

What actions should be undertaken? What risks exist and how might they be mitigated?

* **Implementation Plan**

What are the next steps towards implementing these actions?



Thank you!

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Appendix 6: Performing Arts Gaps Survey Results

City of Vancouver

Activity and Venue Inventory and User/Operator Survey Results Summary

Performing Arts Gaps Study, May 2016

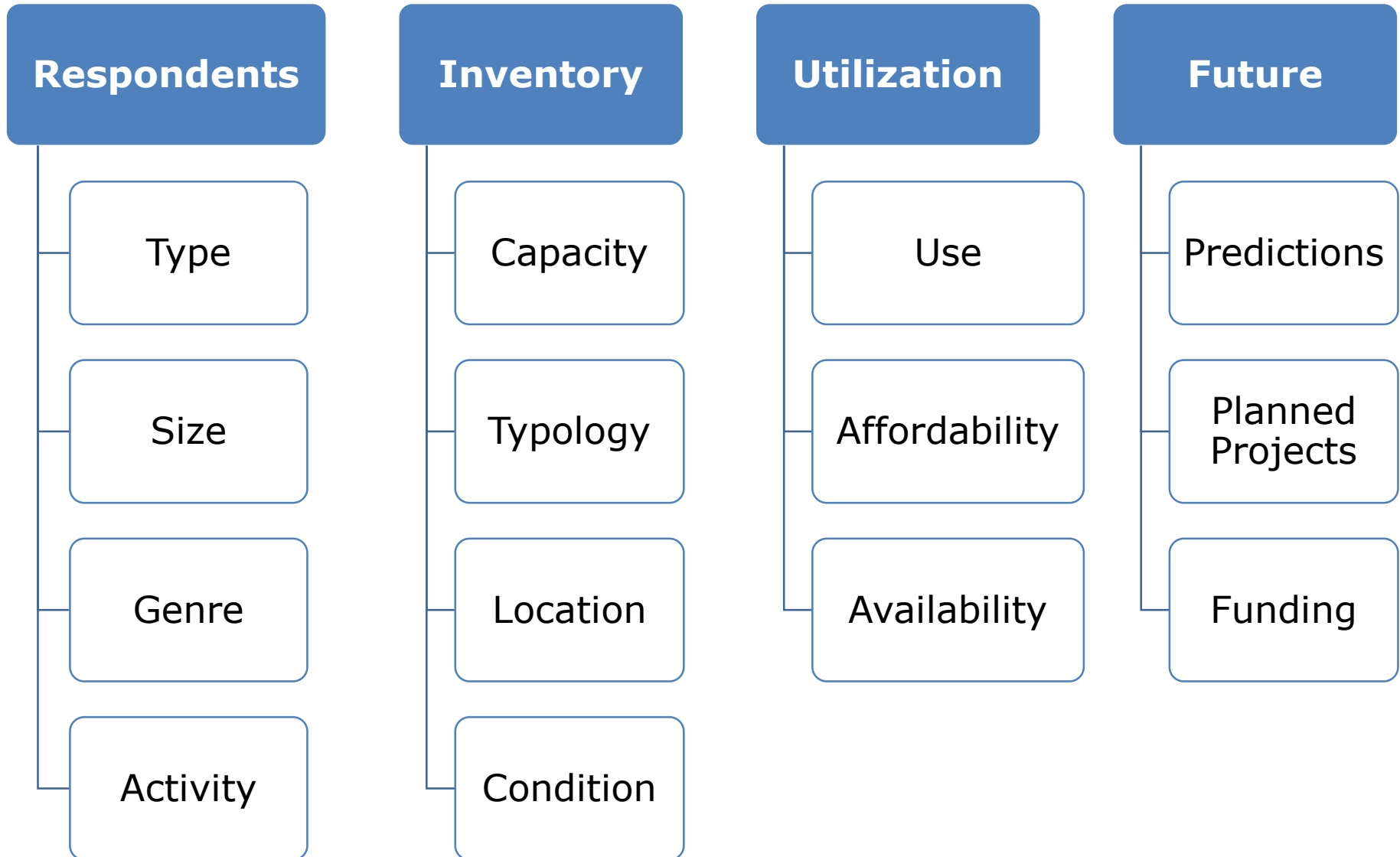


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Methodology notes - survey

- **Objective:** quantify user satisfaction, requirements, expectations, and aspirations around performing arts facilities in the City of Vancouver.
- **Distribution:** 241 potential respondents were contacted by email at launch, having been identified through the City of Vancouver's Cultural Services organization and venue list. Three reminders were sent, and selected key stakeholders were contacted in addition to these reminders.
- **Duration:** 10 weeks - 16 November 2015 and remained open until 25 January 2016.
- **Responses:** 123 completed responses received (51% response rate), of which 8 organizations were excluded because they did not operate in the City of Vancouver. There were also 24 incomplete surveys, which were not used in the analysis.
- **Margin of Error:** The overall margin of error for the survey was $\pm 6.2\%$.

Contents



Respondent Overview



Key Findings

Respondents

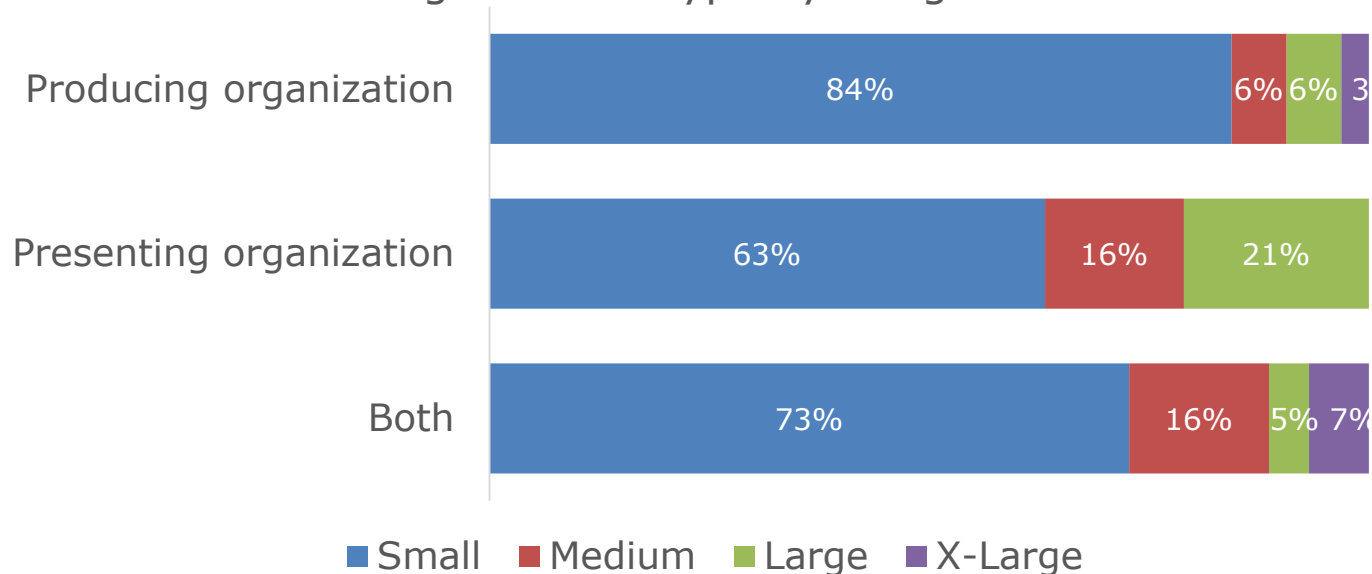
- ✦ Vancouver's performing arts ecosystem is dominated by medium-sized and small organizations.
- ✦ There is a diversity of performing arts activity on offer; dominated by Theatre but encompassing a variety of art forms.
- ✦ Audiences from all over Vancouver are served.
- ✦ Performing arts organizations offer programming at a variety of ticket prices.

Respondents

BUDGET COHORTS

Small	Under \$500K	71
Medium	\$500K to \$999K	12
Large	\$1M to \$8.99M	8
X-Large	\$9M or more	4
Number of respondents (N)		95

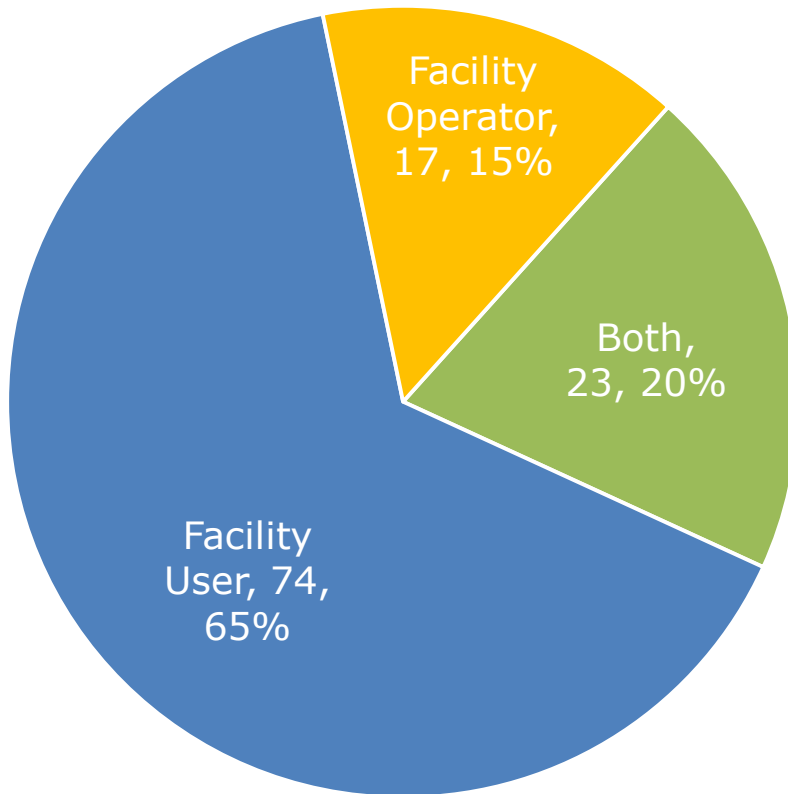
Organization Type by Budget Size



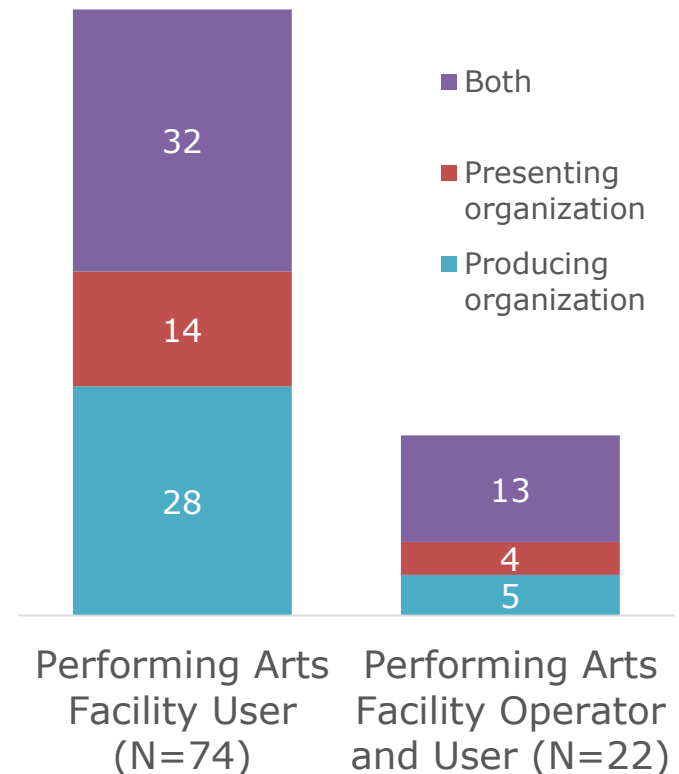
Respondent Types

Of the 114 survey respondents, **the majority are principally facility users**. Among facility users, only 18 are exclusively presenters; the rest produce some or all of their programming.

Respondent Type

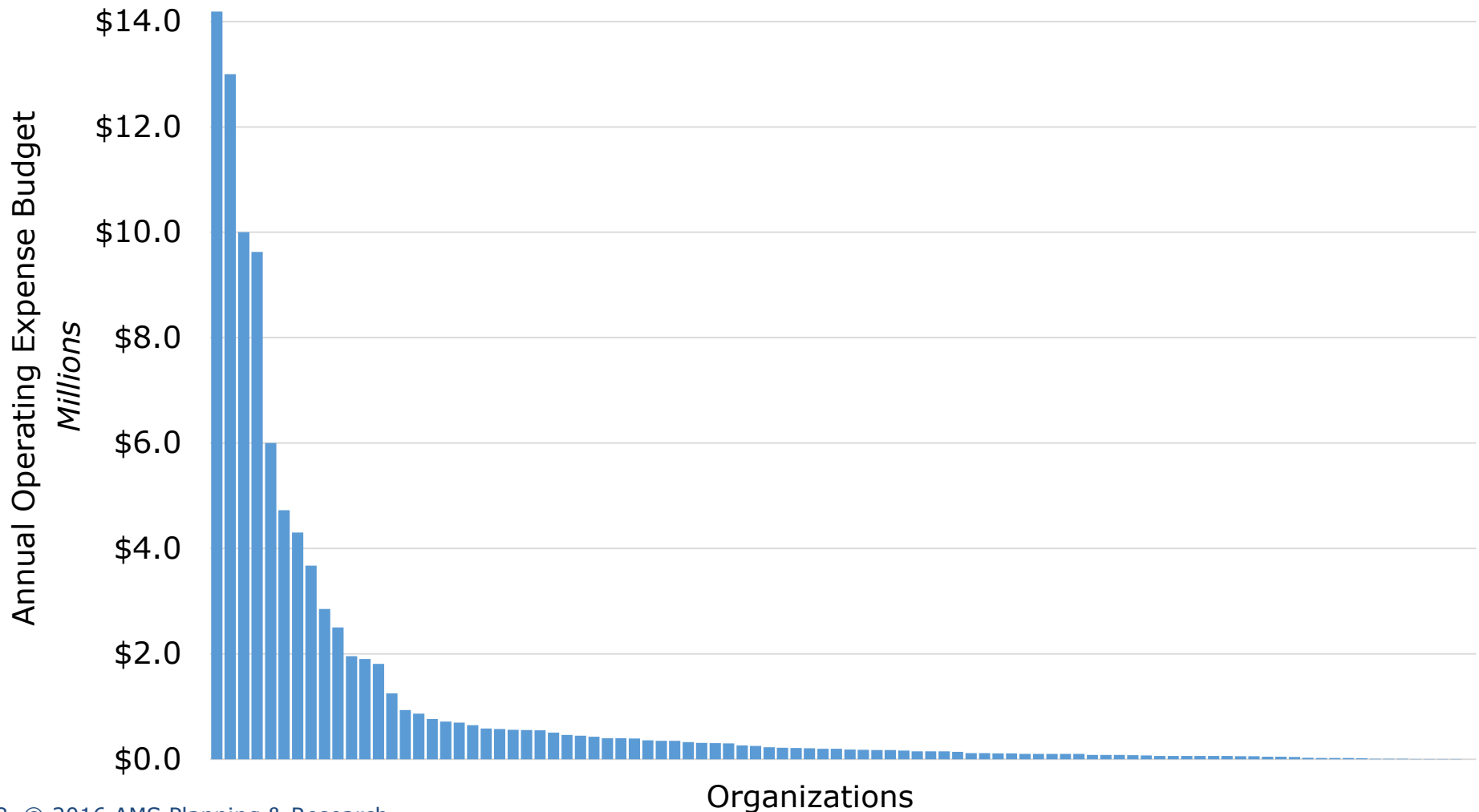


Facility User Type



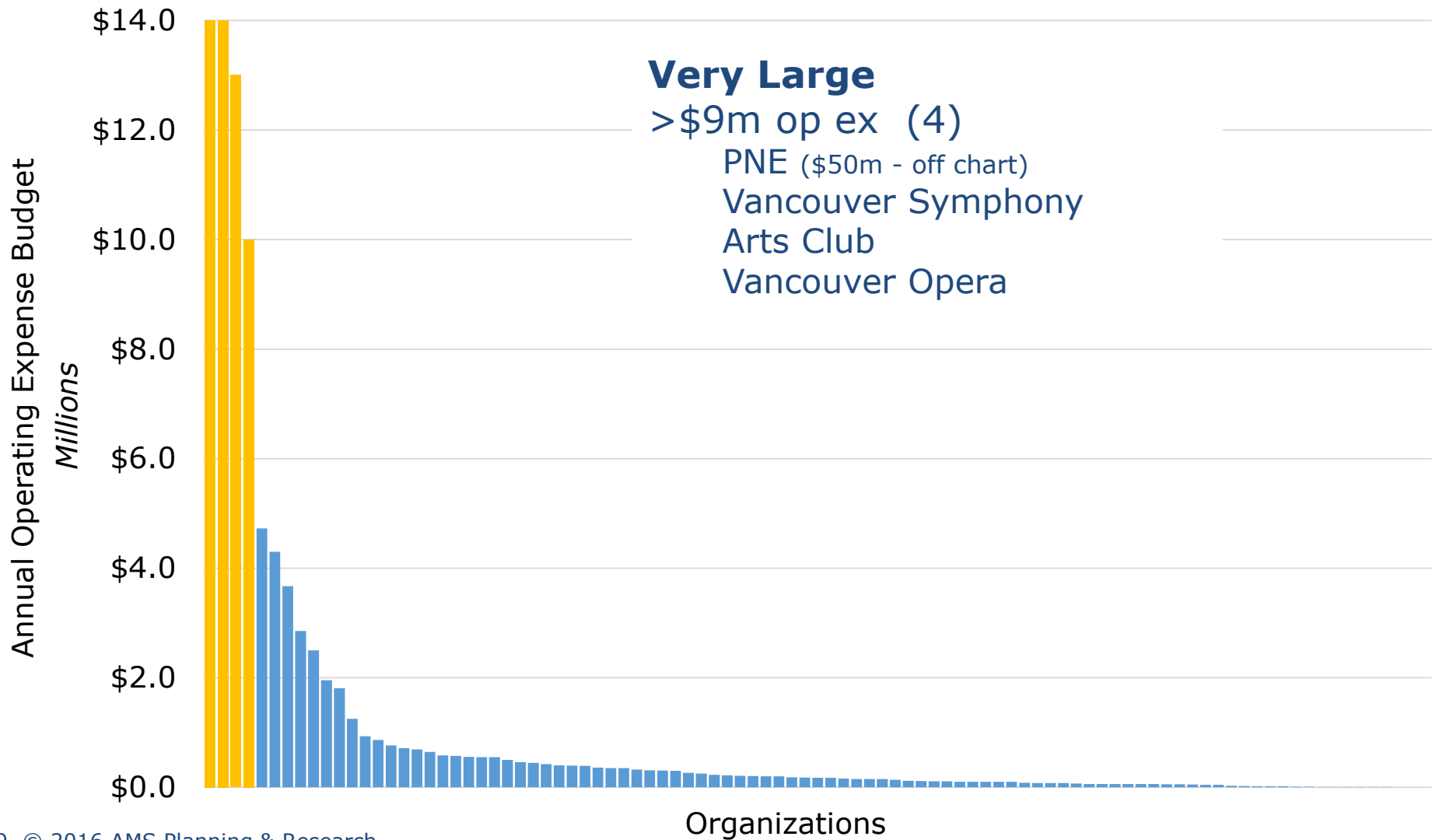
Organization Size

The total operating expenses of surveyed organizations ranged from \$50m to near zero, representing the wide array of organizations in Vancouver.



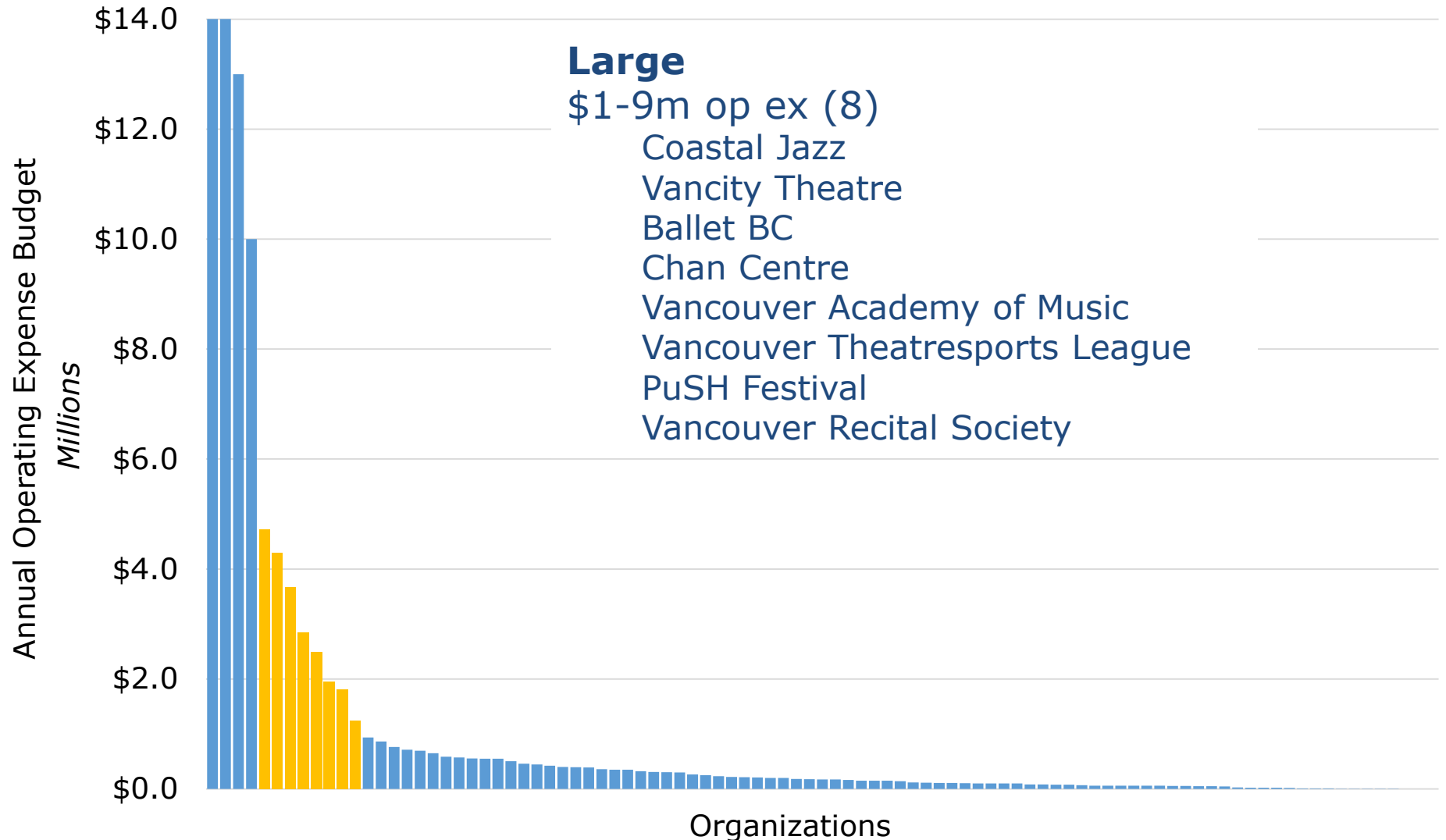
Organization Size

The 114 organizations have been divided into four analysis groups:



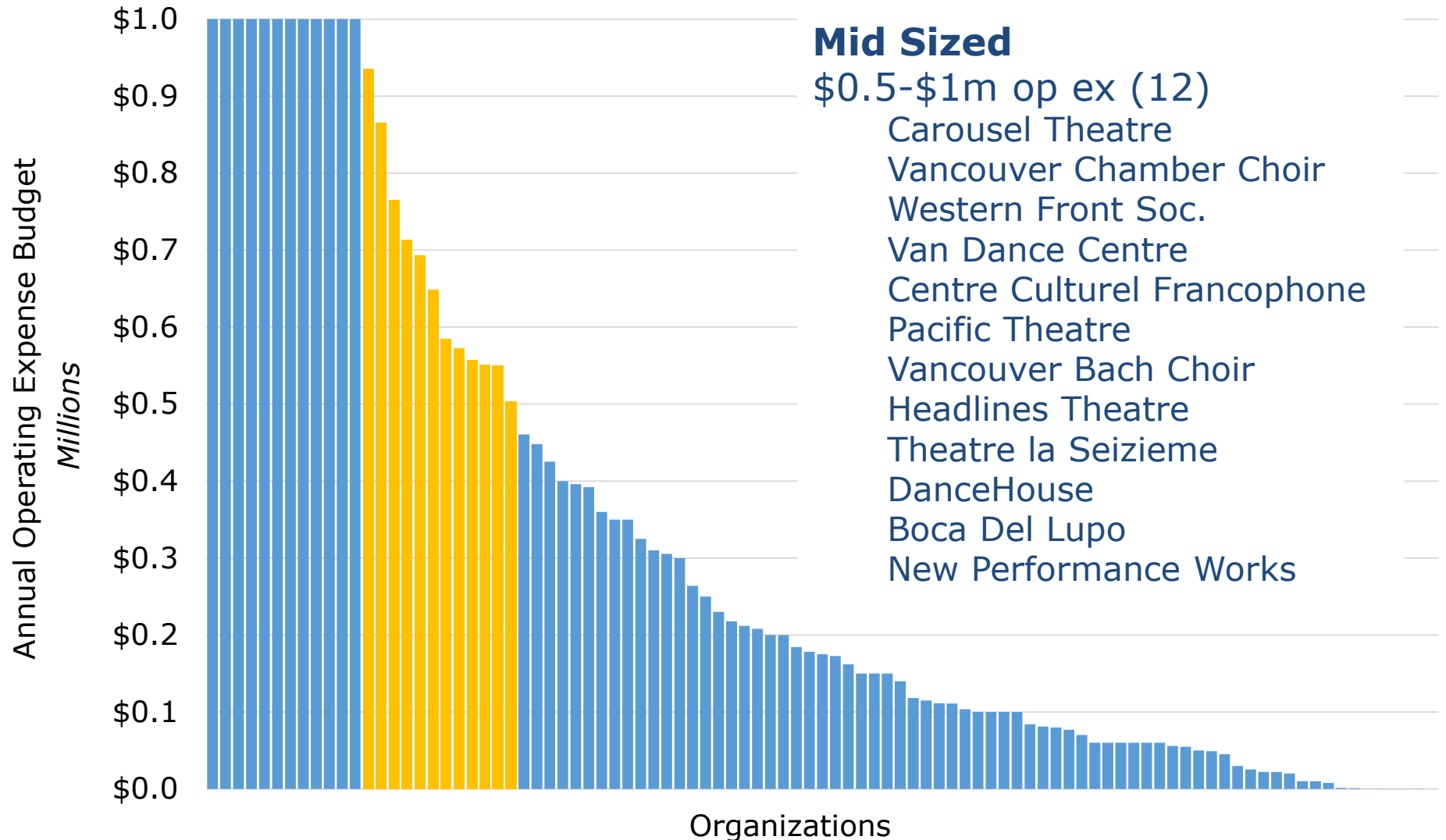
Organization Size

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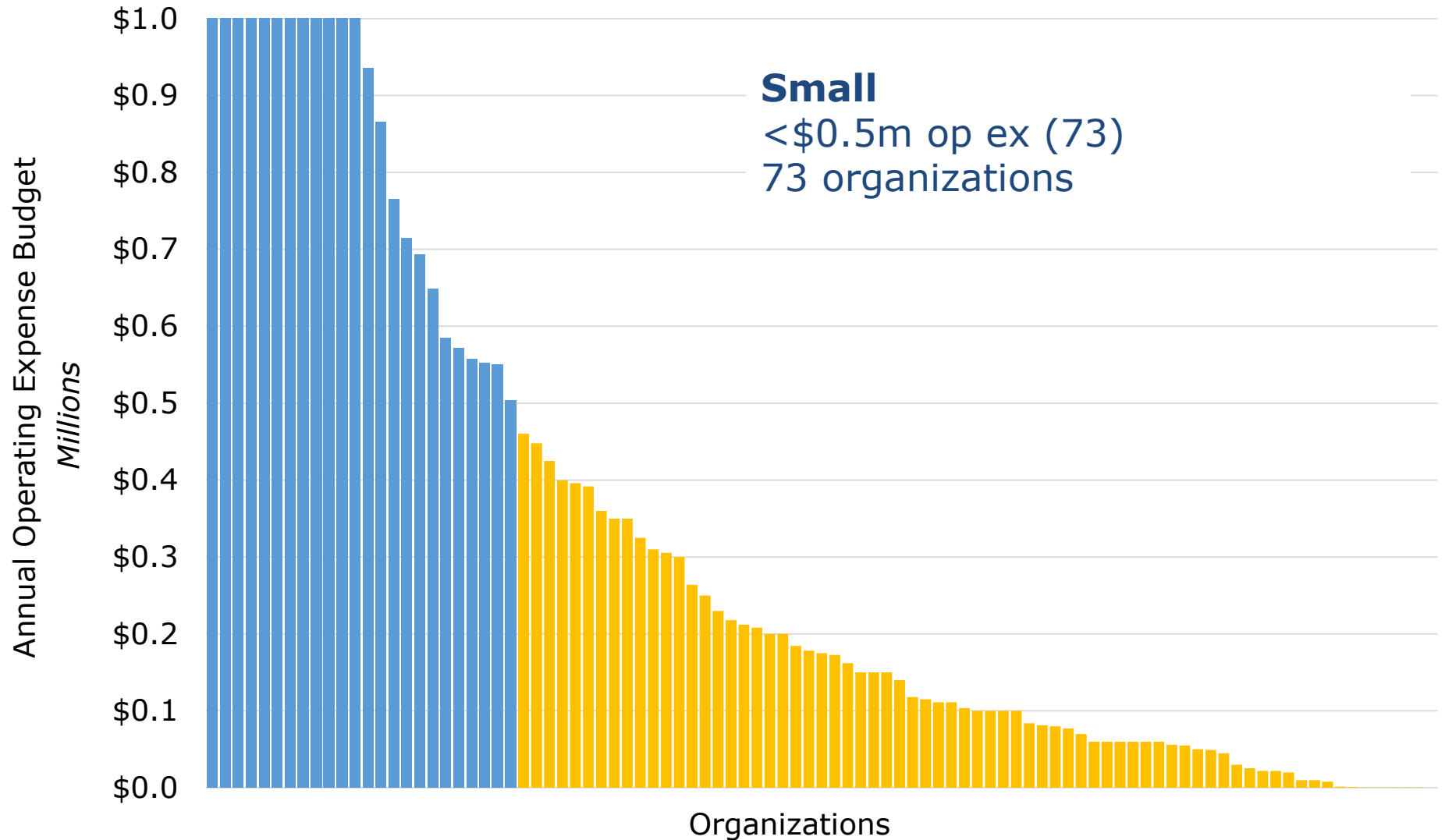
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Organization Size

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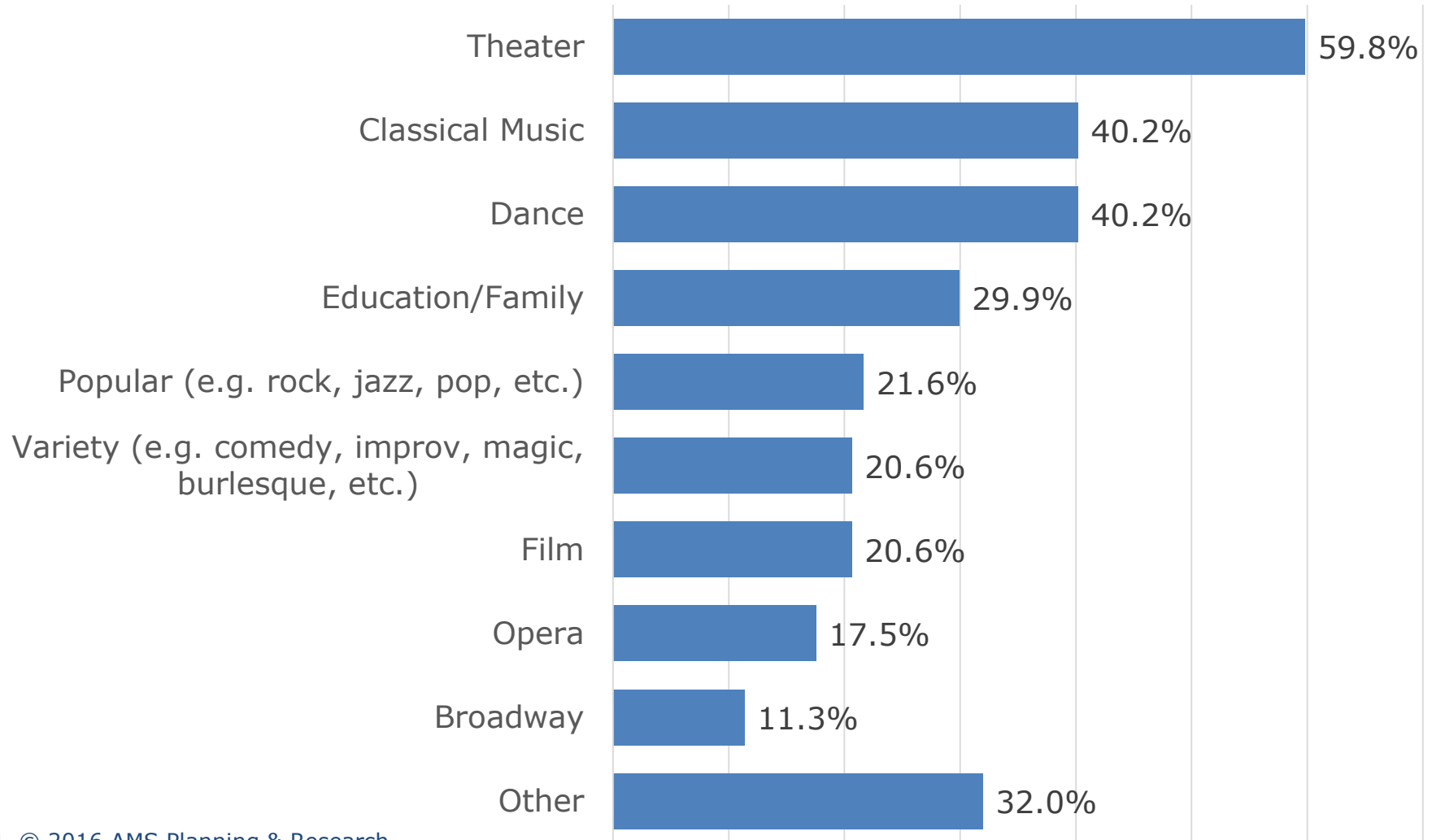
Organization Size

'Small' organizations with <\$500k annual operating expenses, including

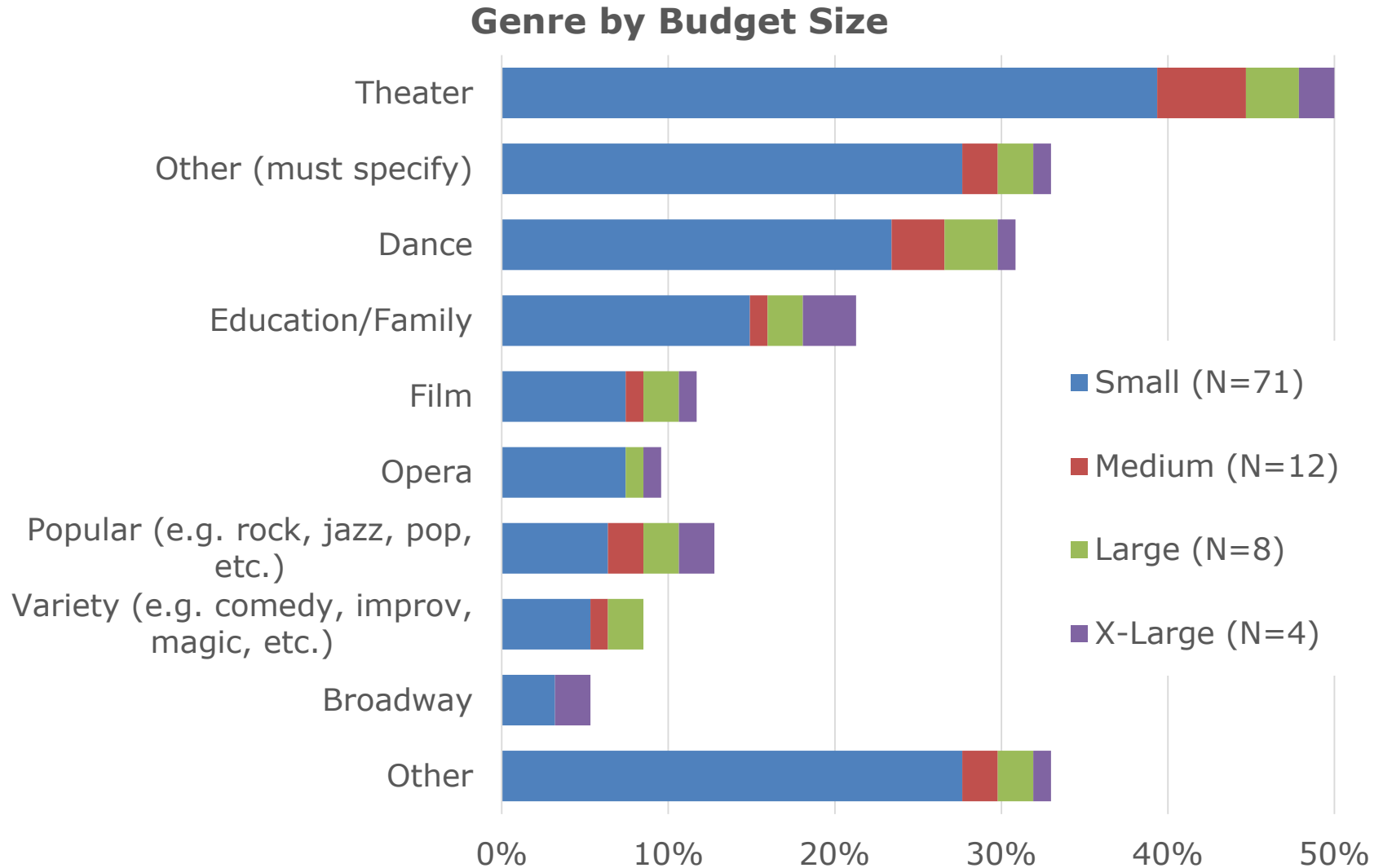
Asian Canadian Studies Soc.
Bard on the Beach Theatre Soc.
Chibi Taiko Assn.
Co. Erasga Dance Soc.
Compaigni V'ni Dansi Soc.
Dream Rider Theatre Soc.
Fight With a Stick (Leaky Heaven Performance Soc.)
Friends of Chamber Music
Holy Rosary Cathedral
Karen Flamenco Dance Soc.
MACHiNENOiSY Dance Soc.
Mandala Arts and Culture Soc.
Patrick Street Productions
Realwheels Soc.
Ruby Slippers Productions Soc.
Shay Kuebler Radical System Arts Soc.
Standing Wave Soc.
Theatre B.C.
Theatre Replacement Soc.
Touchstone Theatre Soc.
Van. Adapted Music Soc.
Van. Chinese Singers Soc.
Van. Inter-Cultural Orchestra (VICO)
Western Gold Theatre Soc.

97 facility users specified an array of genre disciplines, with **nearly 60% reporting Theatre as a key area of practice.**

'Other' responses included: Choral or religious music, new music, world music, interdisciplinary programs, folk, and digital performance.

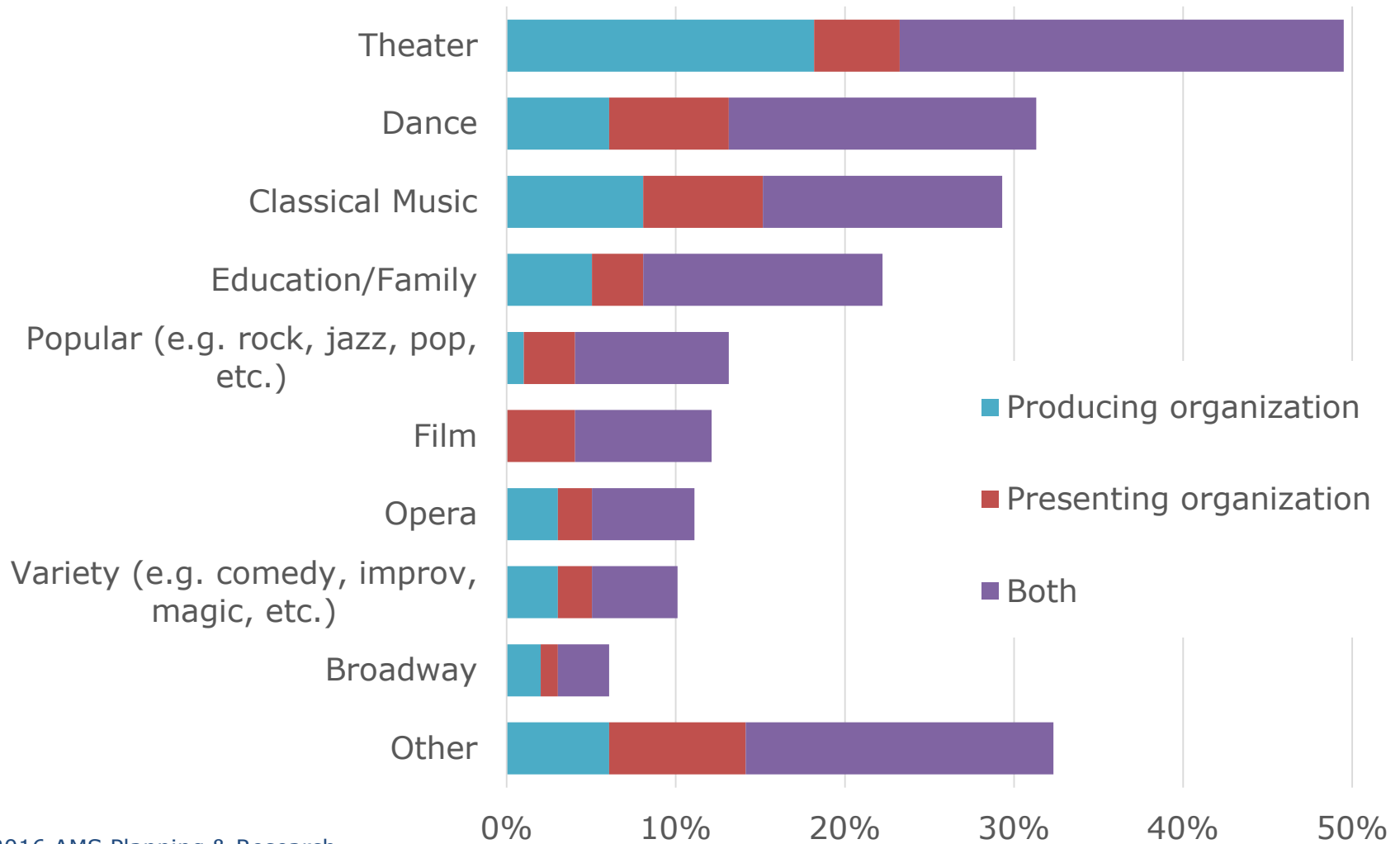


Areas of practice are **distributed fairly evenly** across the organizational size categories.



Dance, popular music, and film are dominated by presenting organizations, while the **theatre genre alone has many more producing organizations.**

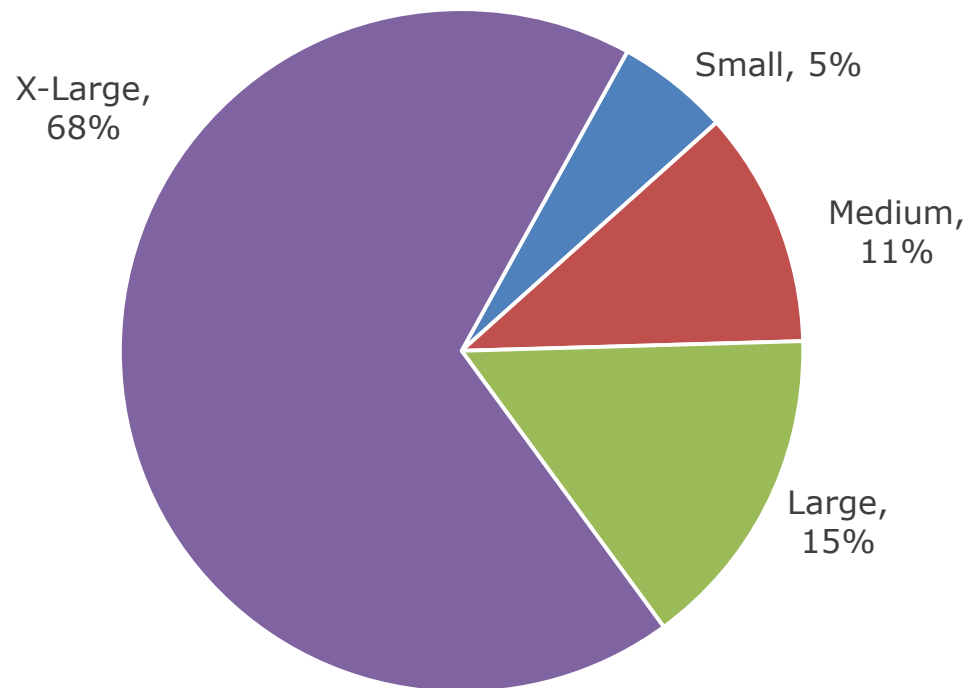
Genre by Organization Type



Activity

Vancouver sees nearly **10,000 performing arts events** annually, ranging from school workshops to music festivals, and serving over **2.6 million audience members**.

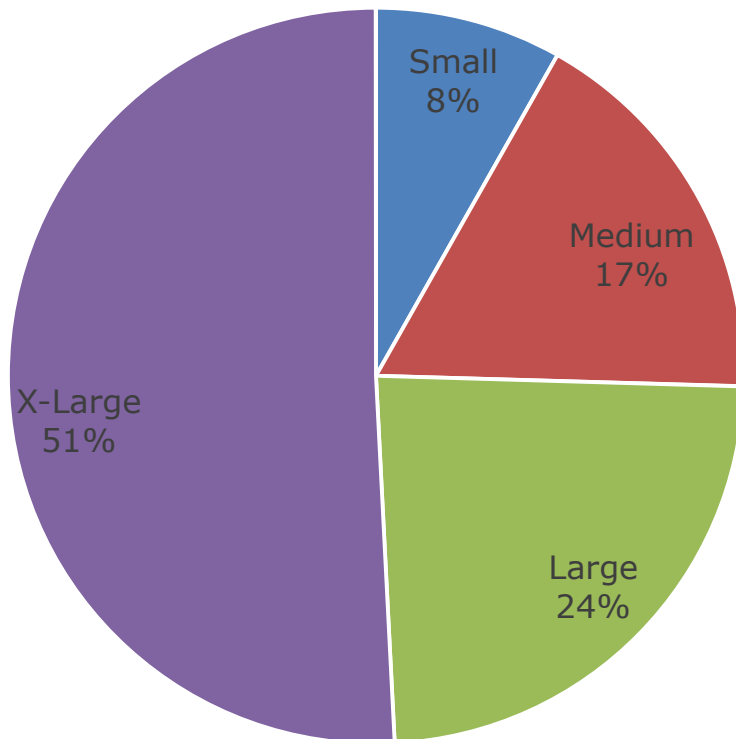
**Percentage of Total Attendance
by Venue Size**



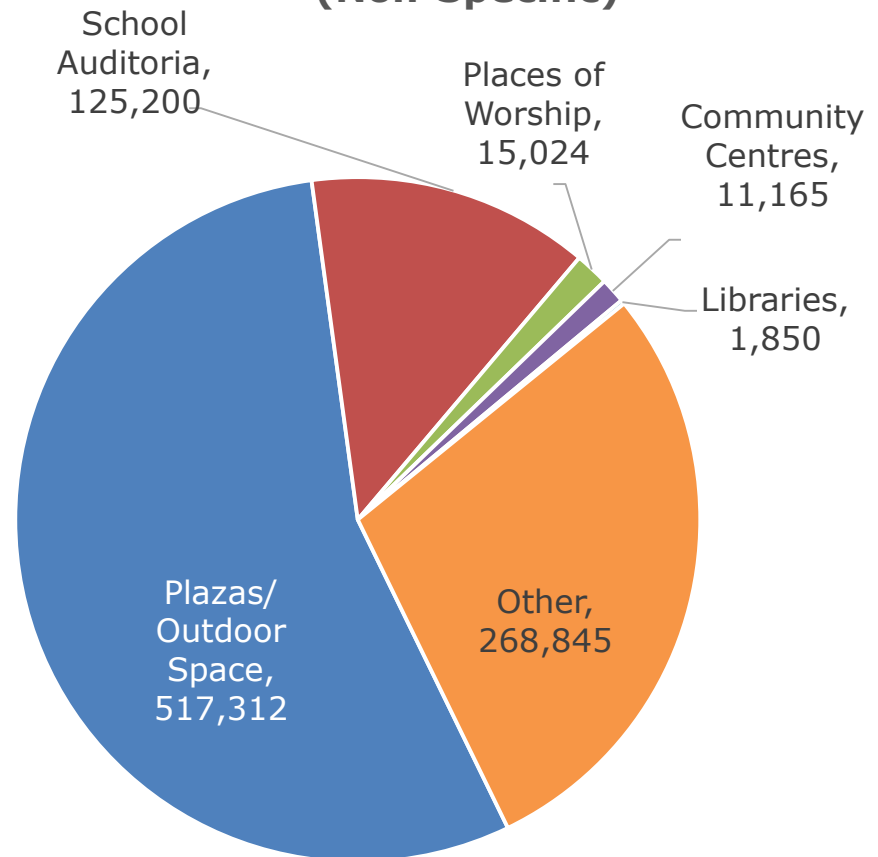
Activity

Vancouver's largest venues welcome the largest numbers of people.

**Percentage of Total Attendance
by Venue Size**



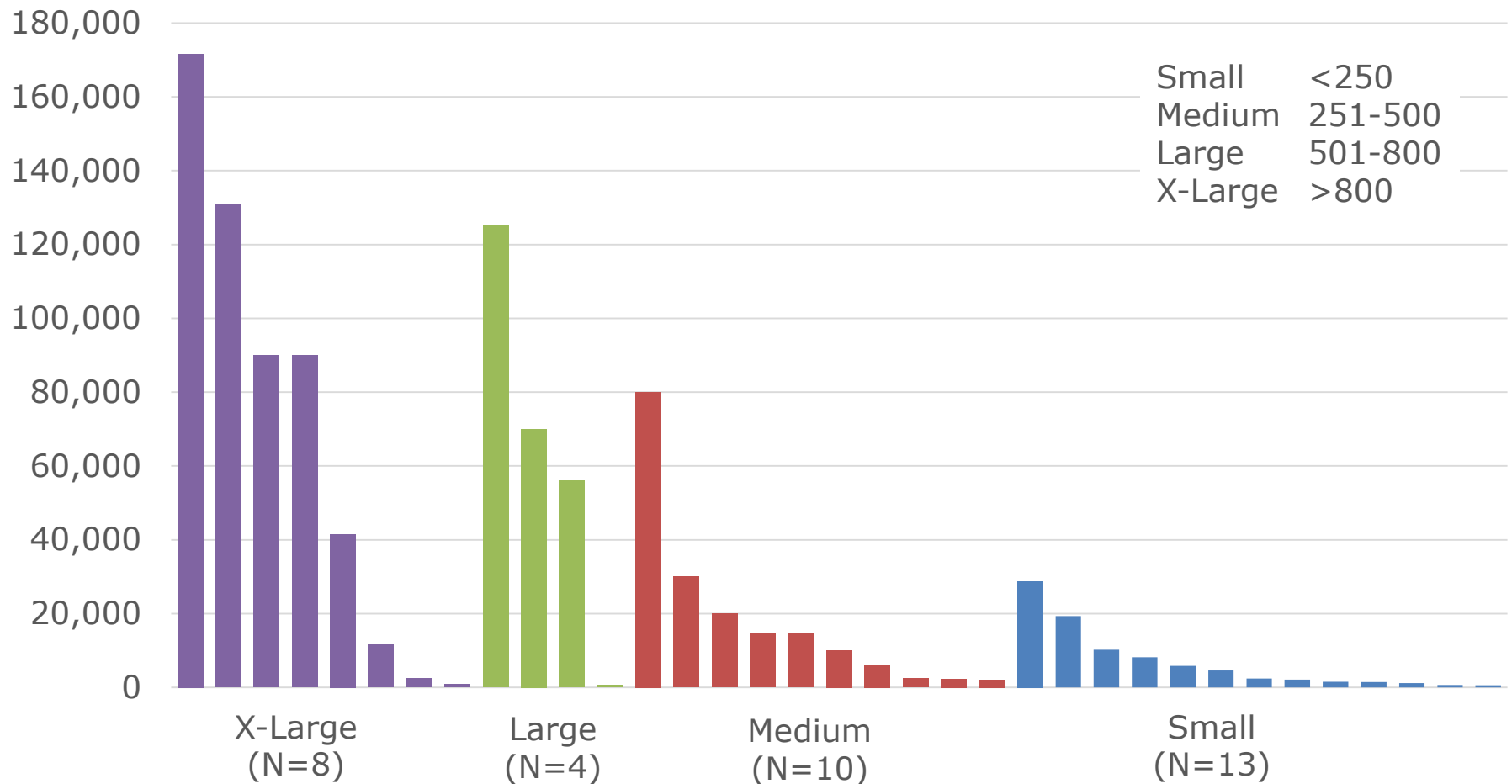
**Attendance by Venue
(Non-Specific)**



Activity

One venue reported more than 575,000 in total attendance (not shown), while wide ranges were seen within cohorts.

Total Attendance by Venue Size



Audiences Served

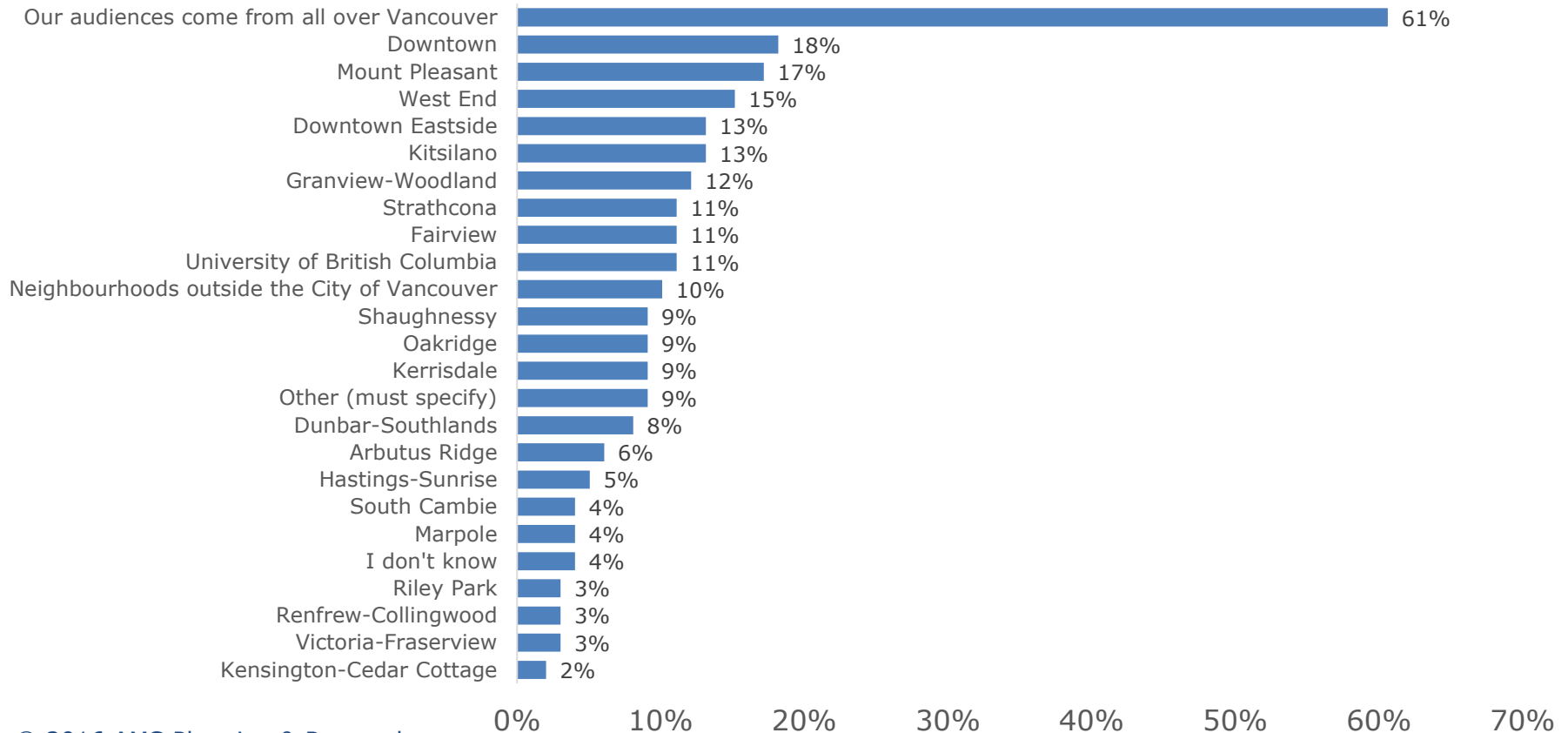
14% of venue users reported that they **serve a specific audience**:

- 5 reported serving visible minority groups, all of which included **East Asian or Chinese audiences**, and one serving South Asian audiences. One organization reported serving indigenous audiences.
- 6 reported serving a specific age group, of which **5 were directed to children under 18**; only one served seniors over 65 years old.
- 5 reported serving other specific groups, ranging from families, to people with disabilities, to people interested in non-traditional presentation formats.

Areas Served

The majority of venue users report **serving audiences from all over Vancouver**. Some neighborhoods southeast of downtown are not as well-represented.

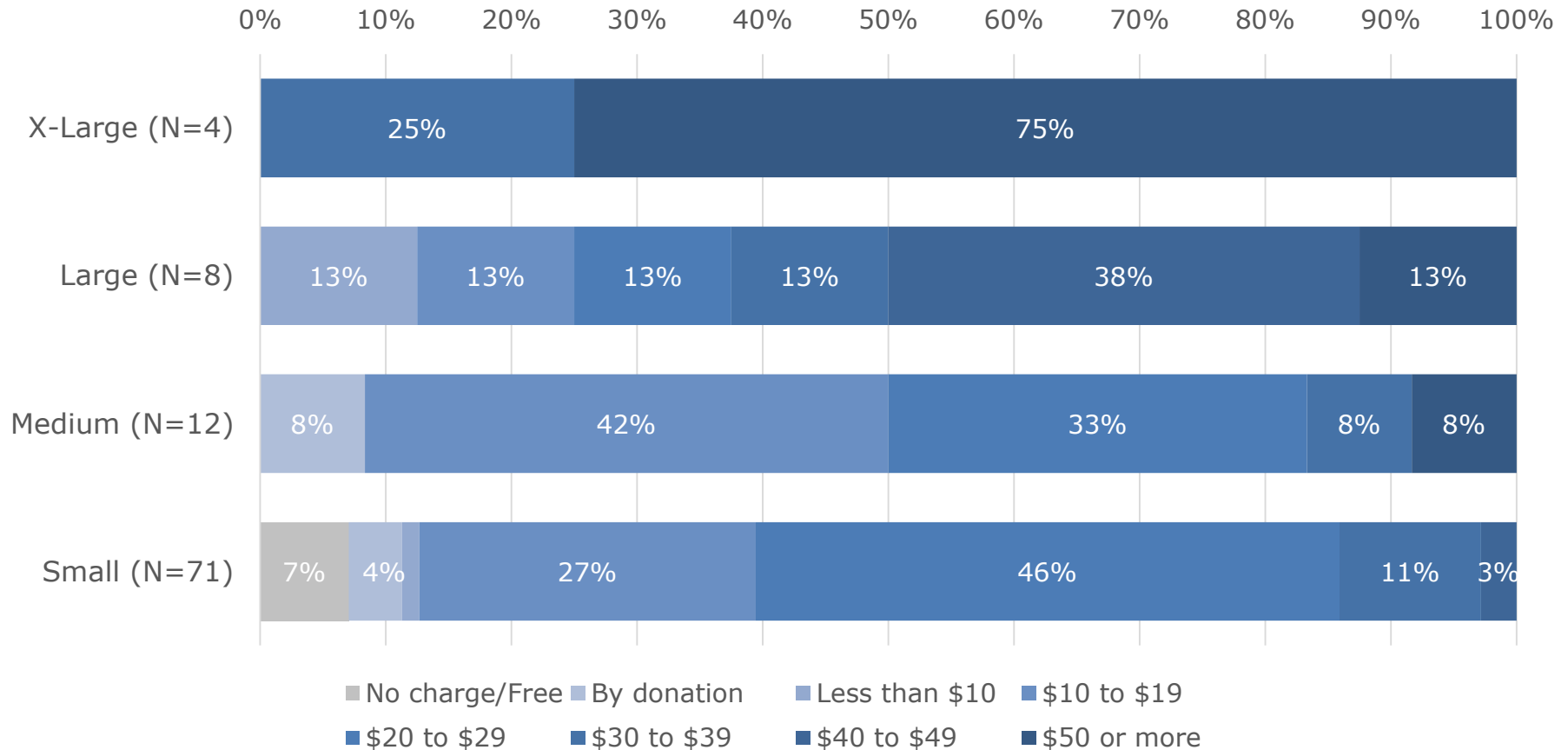
Which neighbourhoods account for the largest part of your audience? (N=99)



Ticket Price

Larger organizations tend to charge higher ticket prices; low-cost programming is provided by small, medium, and large organizations alike.

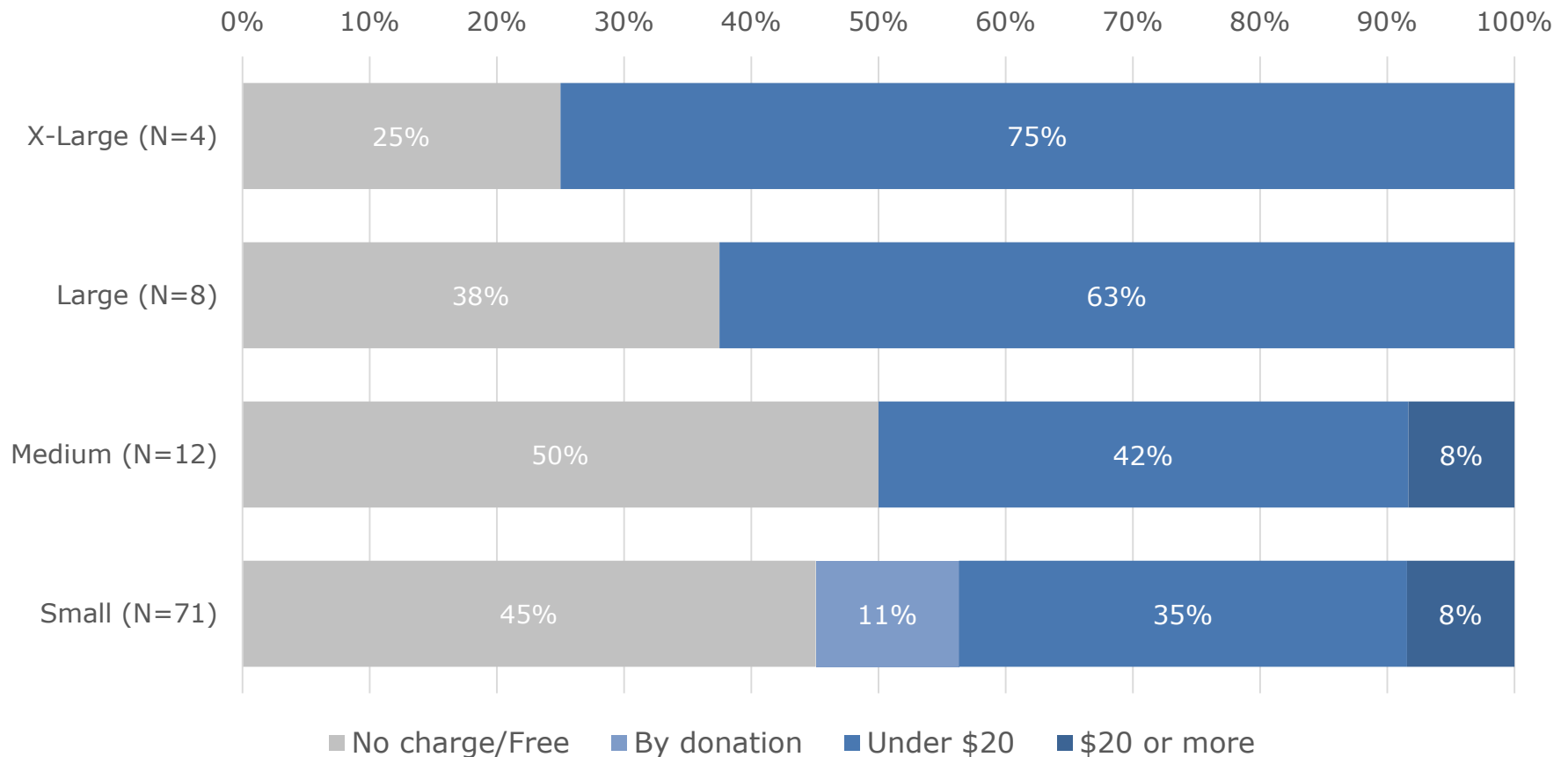
Most Commonly Offered Ticket Price by Org. Size



Ticket Price

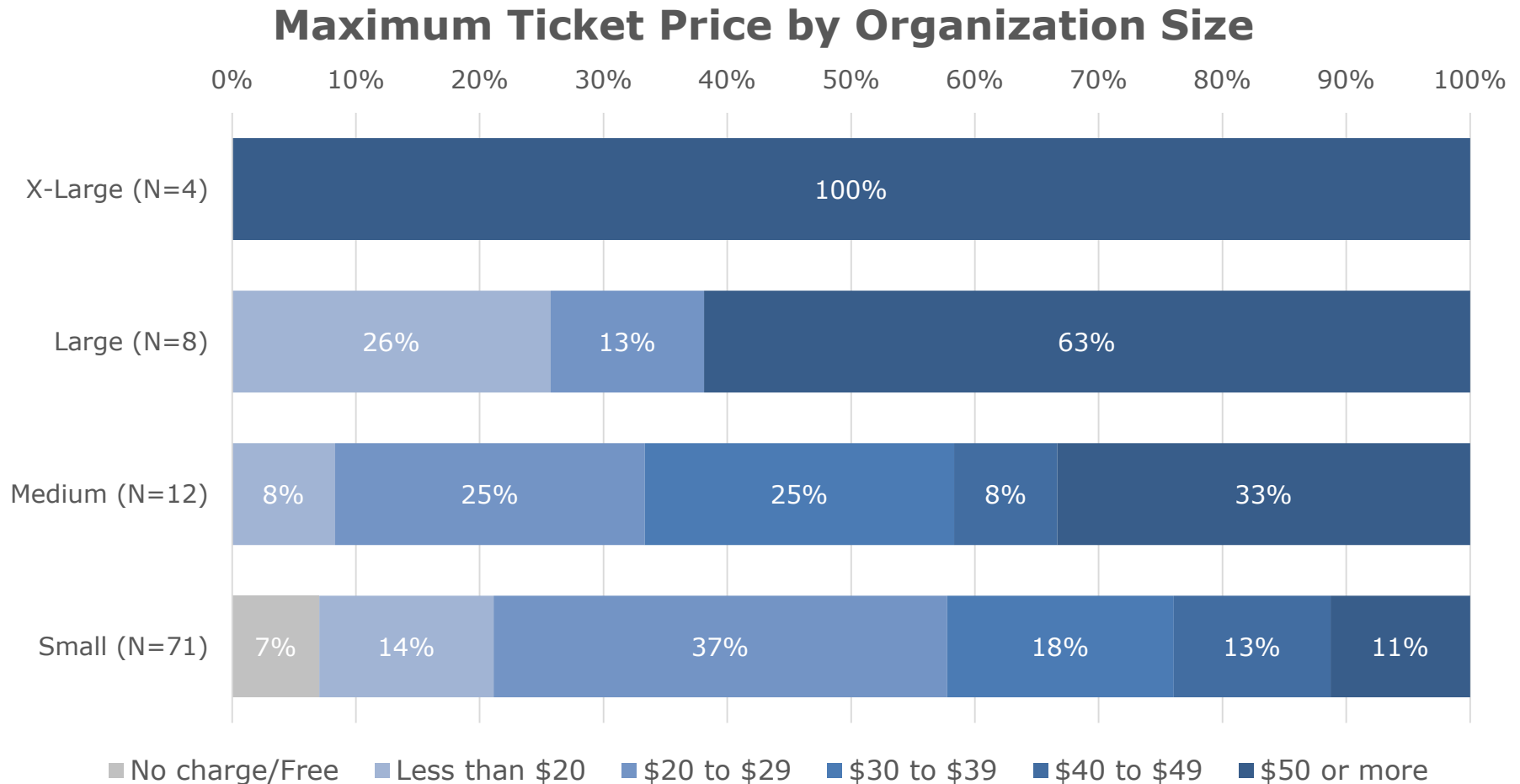
Organizations of all sizes provide some free programming; some smaller organizations do not offer low-cost programming.

Minimum Ticket Price by Organization Size



Ticket Price

Maximum ticket prices generally increase with the size of the organization.



Venue Inventory



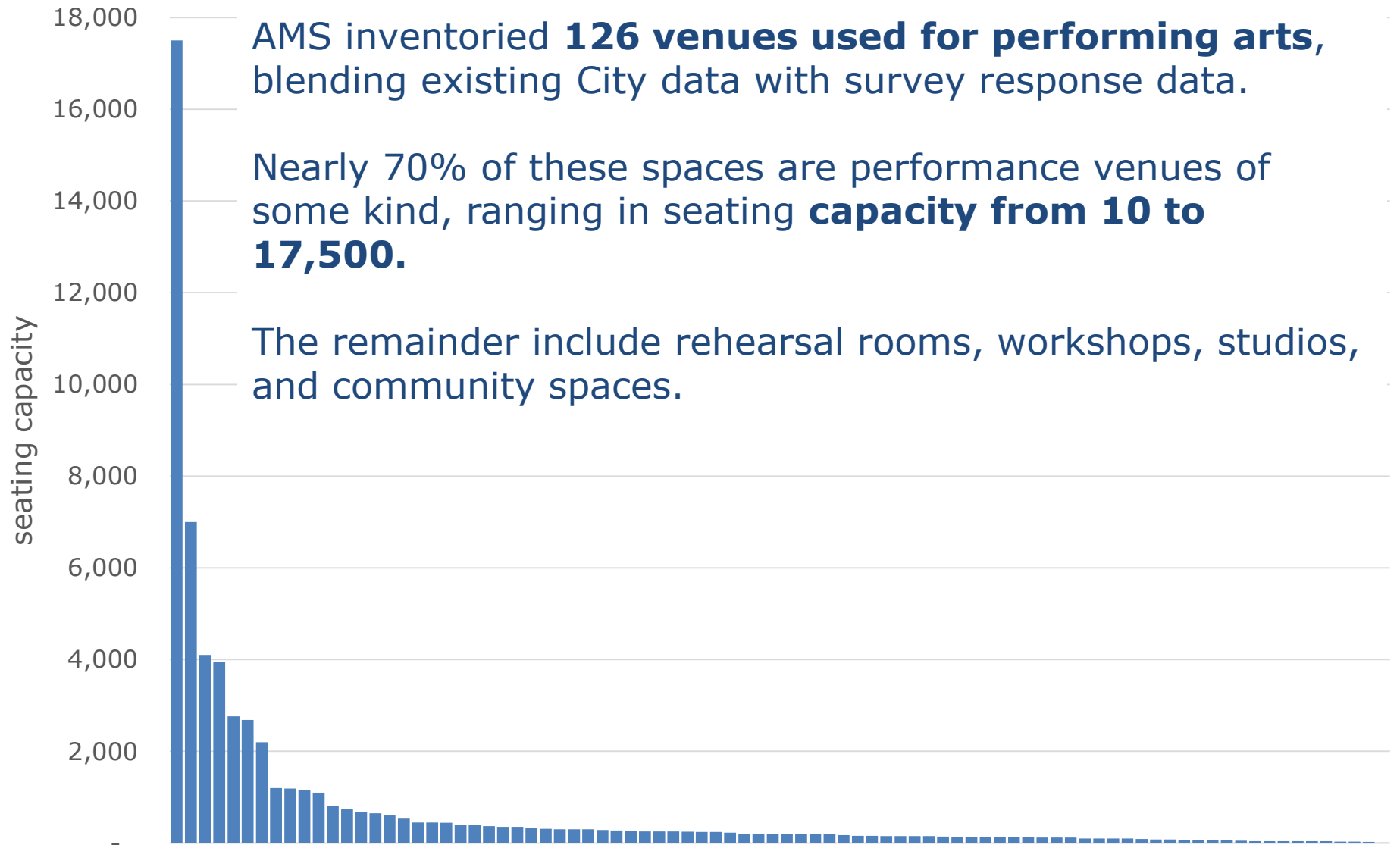
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Key Findings

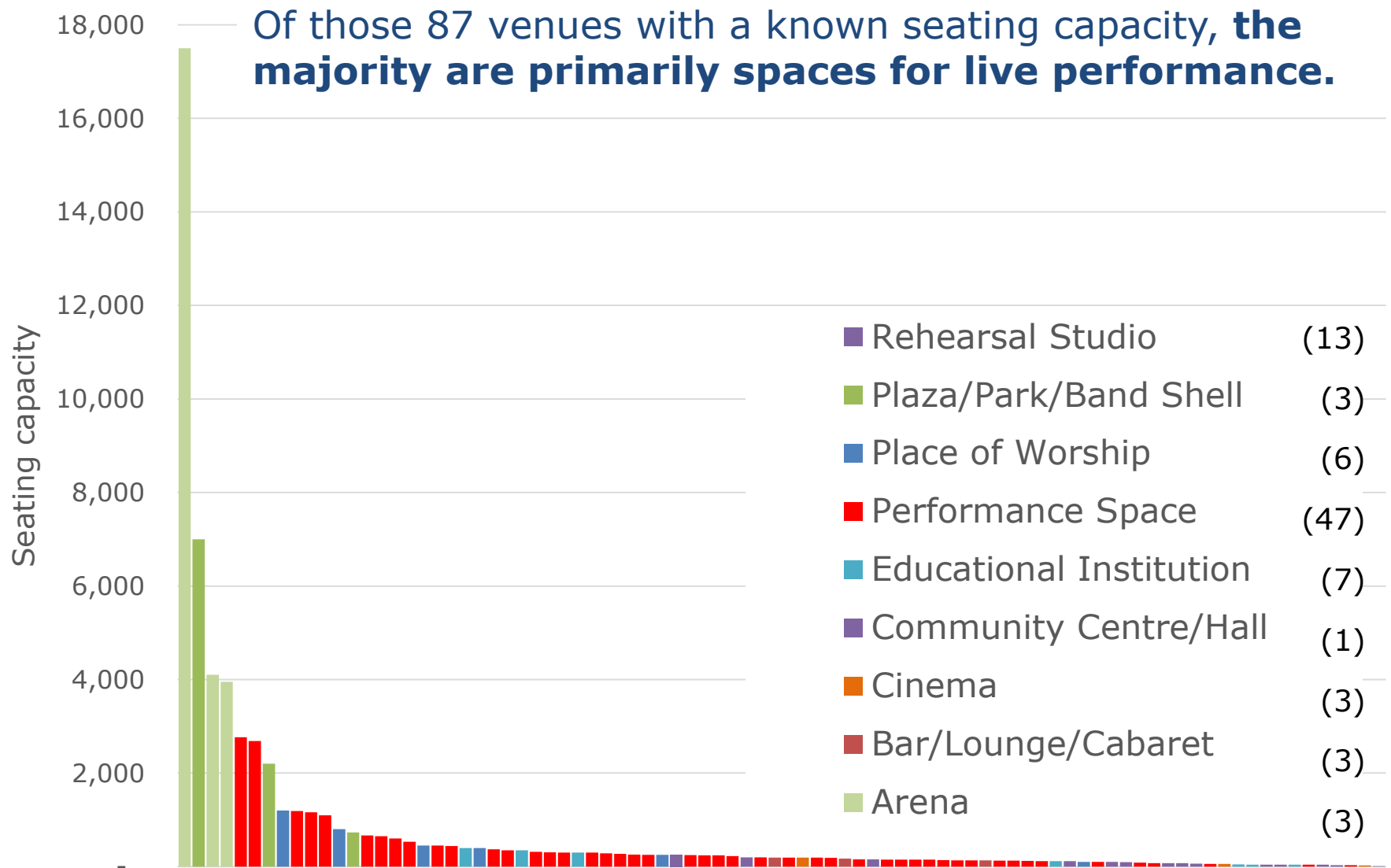
Inventory

- ✳ There are few mid-sized (250-800 seats) performance venues in Vancouver.
- ✳ Of the mid-sized venues, many are controlled by educational institutions or producing organizations.
- ✳ Though the government owns significant performing arts space in Vancouver, its involvement with operations is much less.
- ✳ Overall, respondents are more satisfied with the condition and functionality of available spaces than in 2008.
- ✳ Producing organizations report a need for production and rehearsal space, and presenting organizations report a need for administrative.

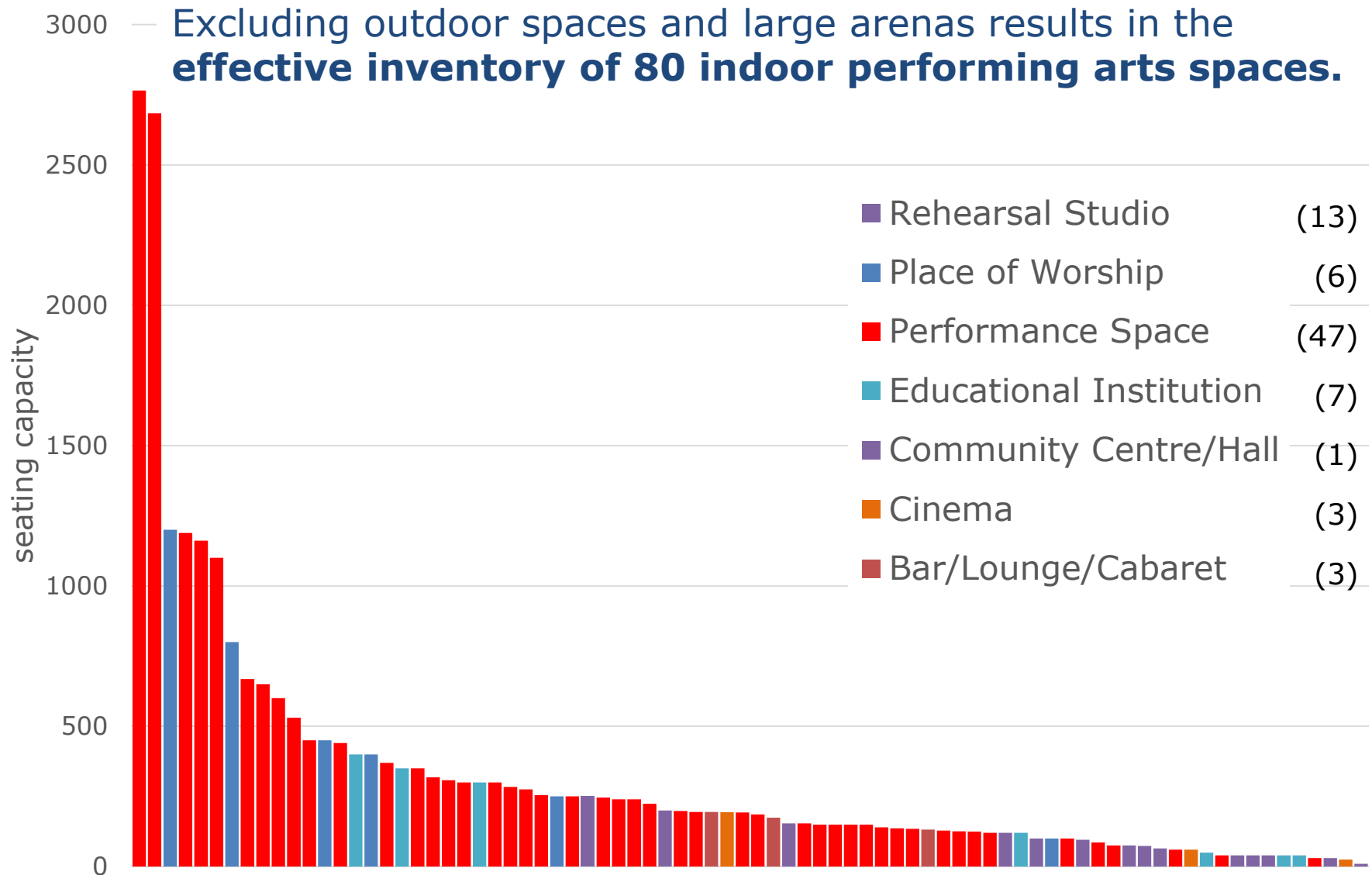
Venue Inventory



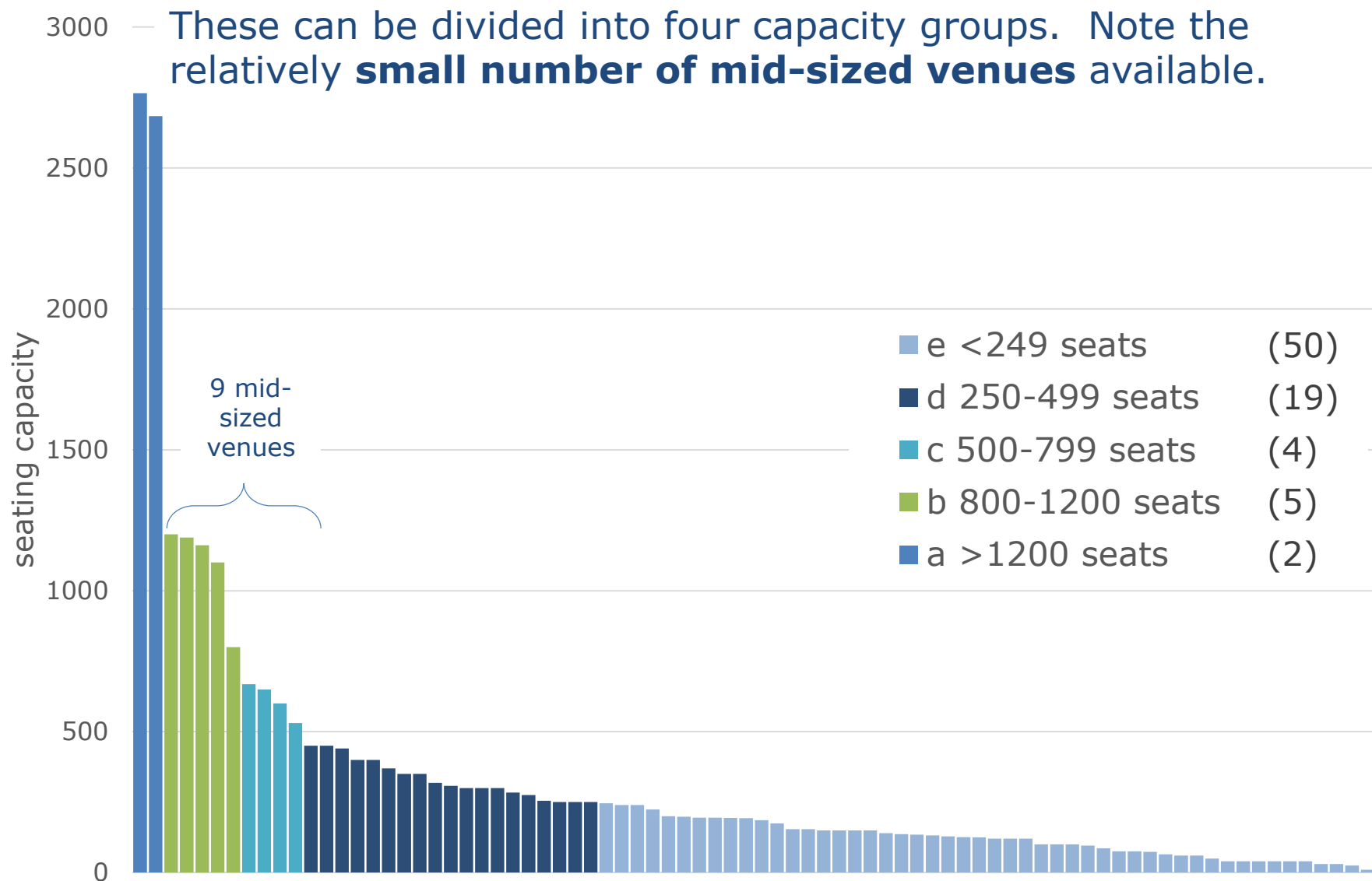
Venue Inventory



Venue Inventory

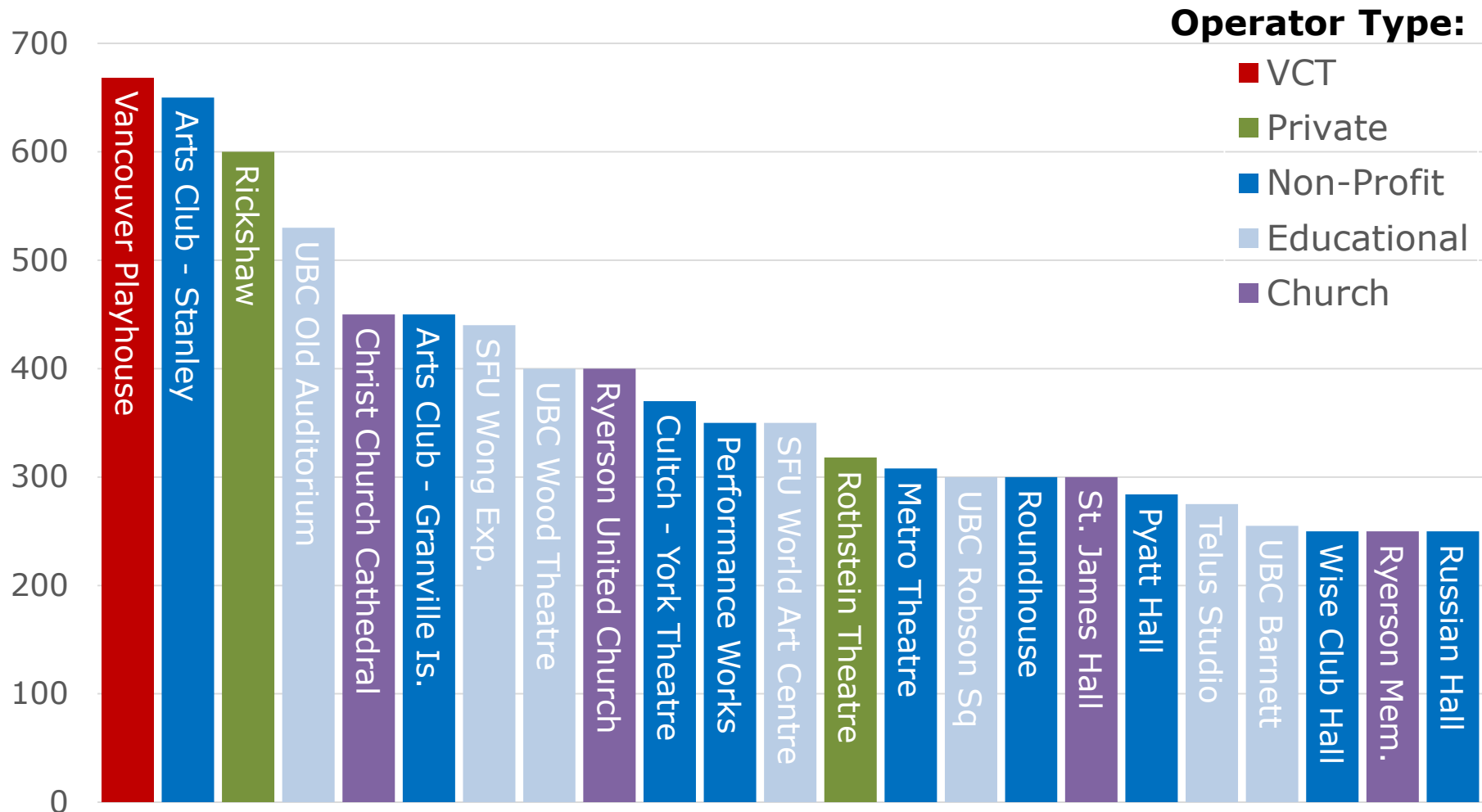


Capacity Groups



Mid-Sized Venues

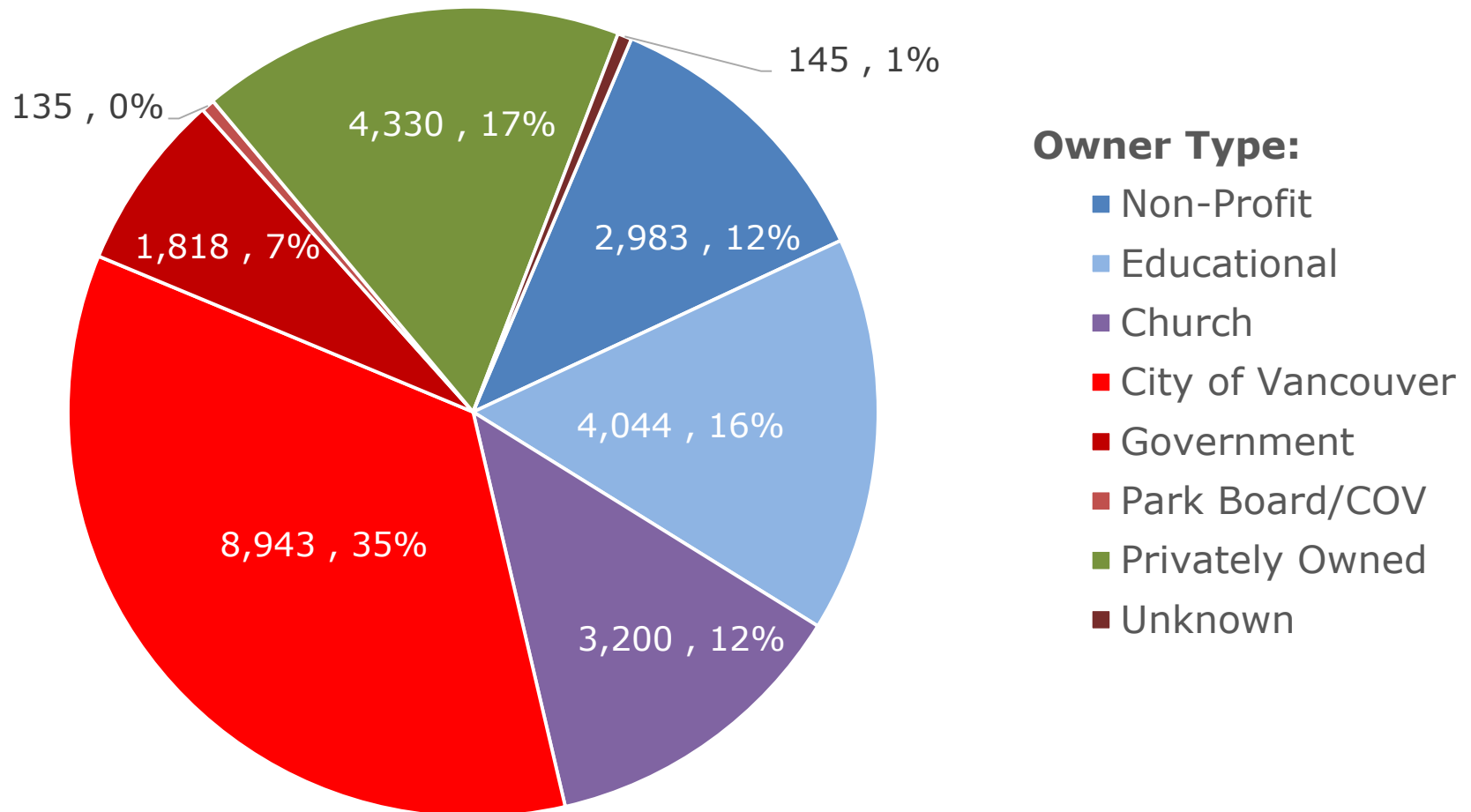
Among these mid-sized venues, many are educational venues or are controlled by producing organizations.



Venue Ownership

Over **40%** of performance space seats are owned by government agencies.

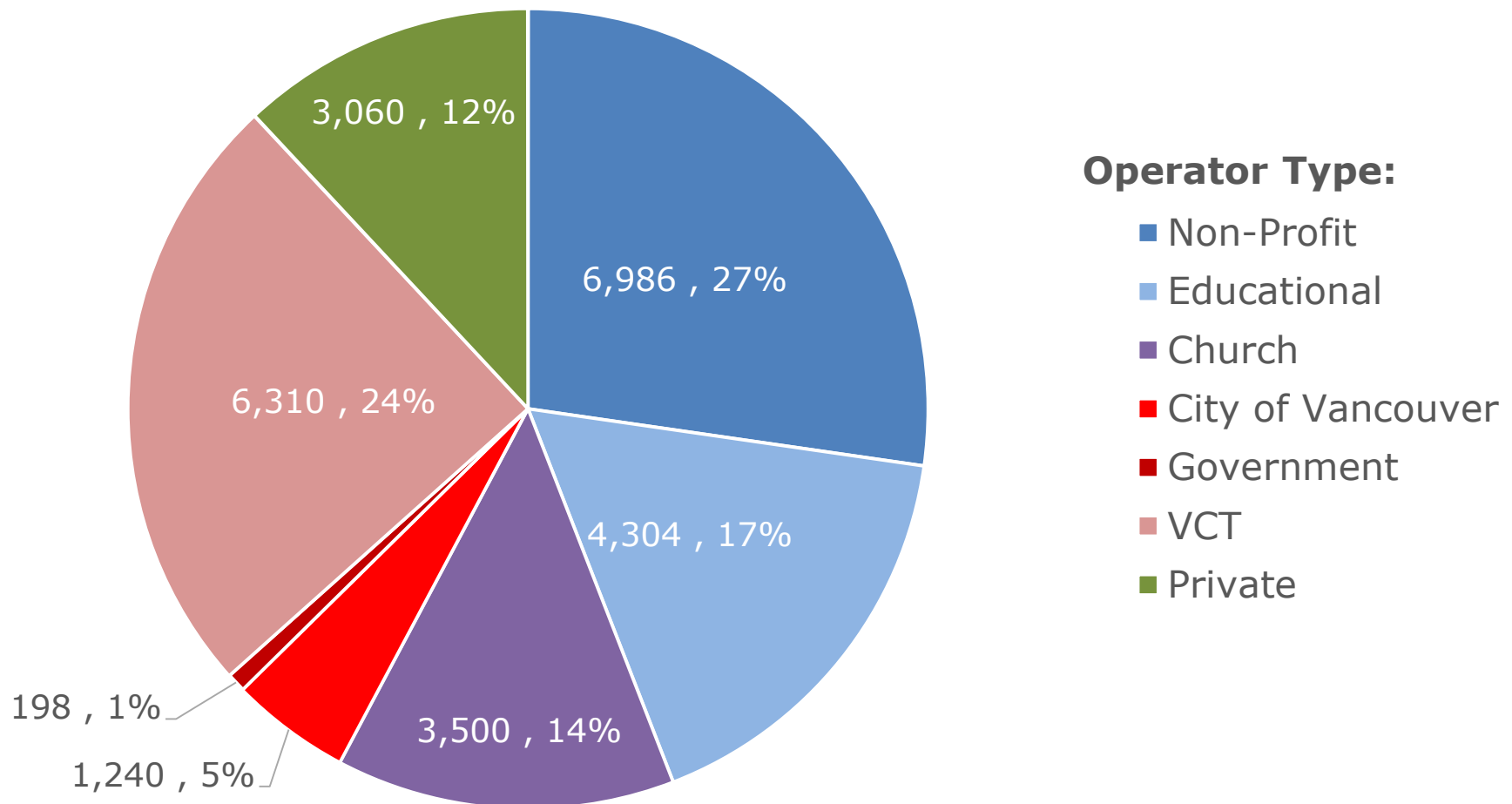
Total Performance Space Seats by Owner Type



Venue Operations

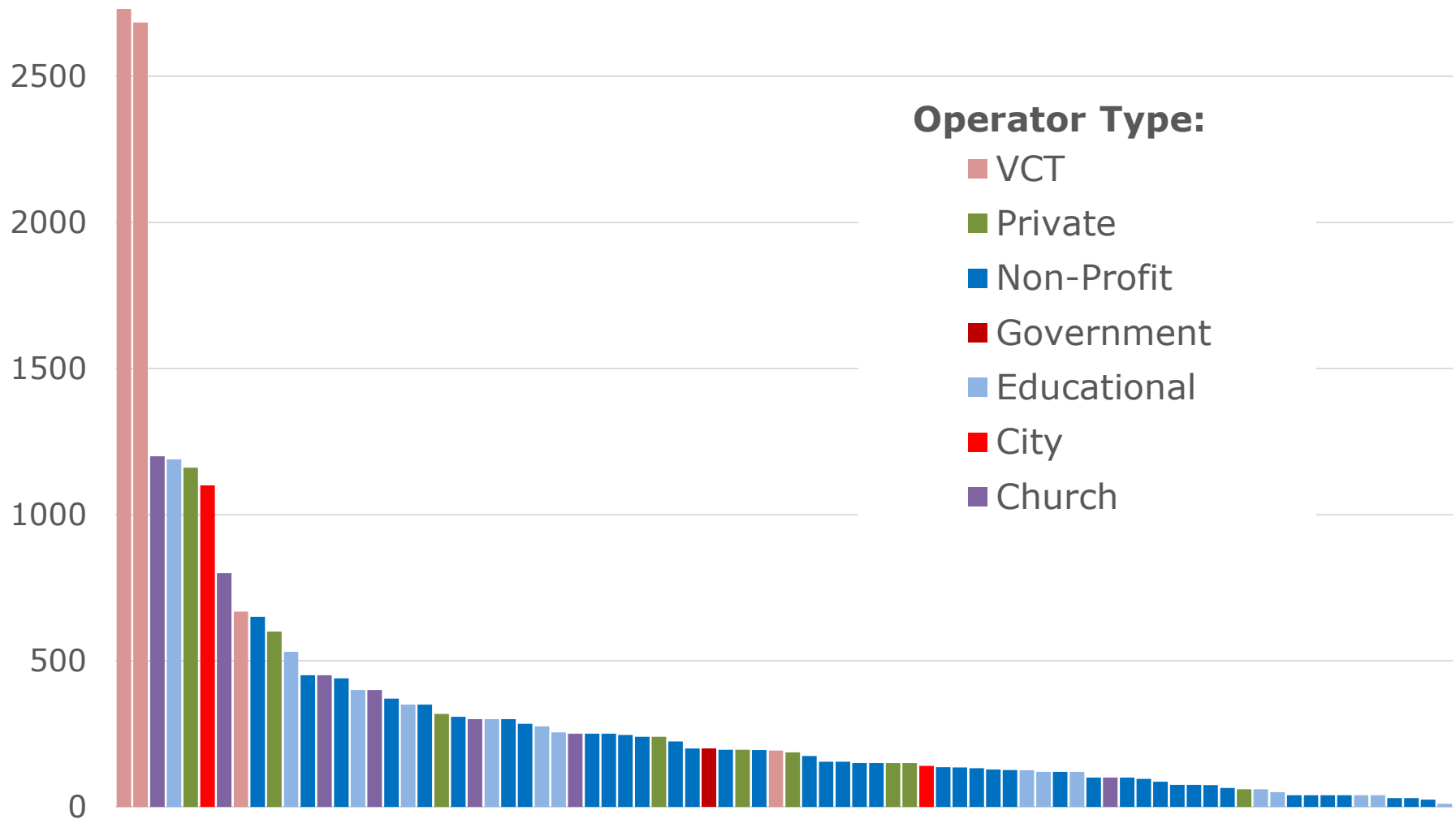
Whereas, **beyond VCT**, the government's involvement in venue **operation** is limited.

Total Performance Space Seats by Operator Type

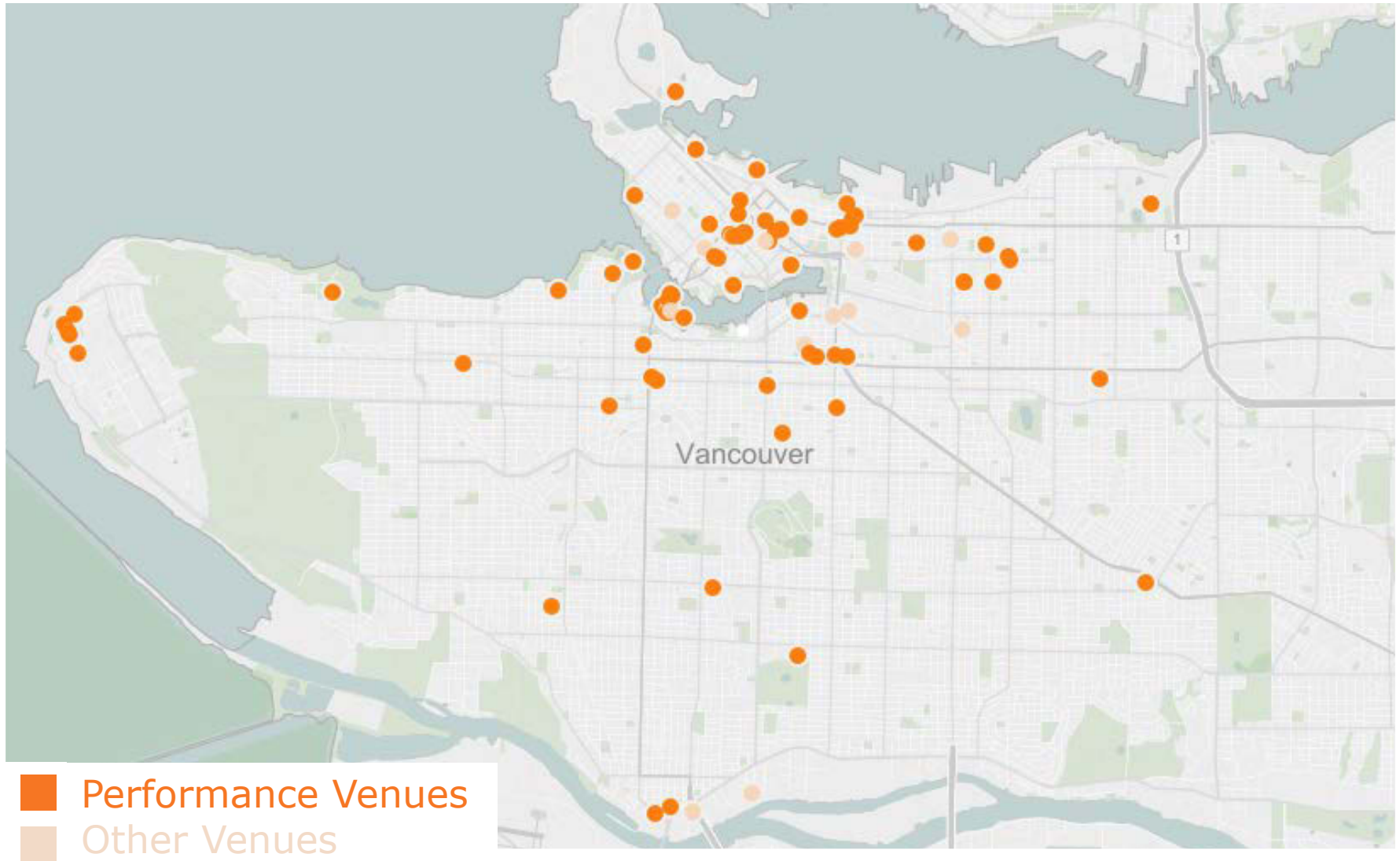


Venue Operations

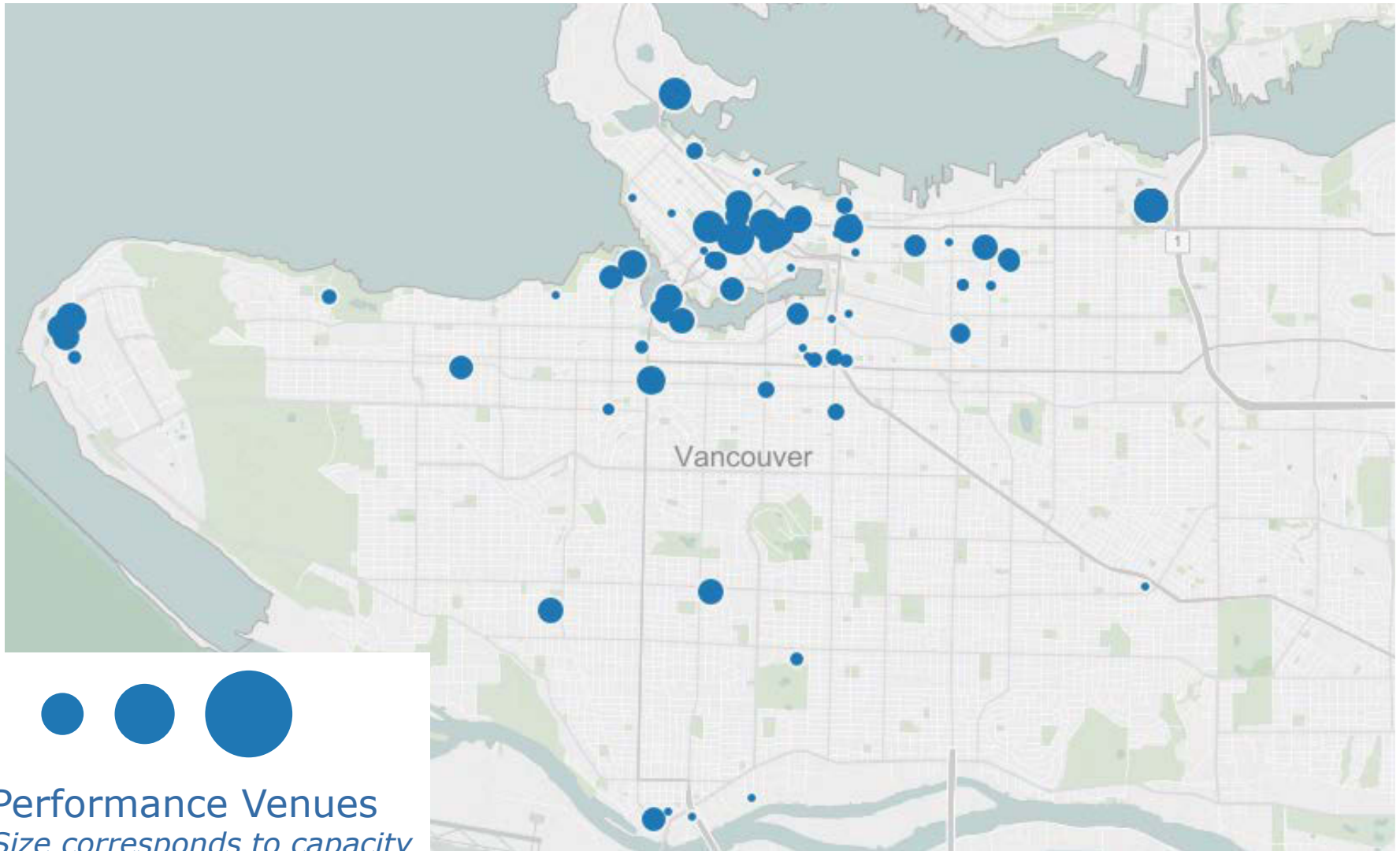
Whereas, **beyond VCT, the government's involvement in venue operation** is limited.



Performing arts venues are distributed throughout the city, but are **concentrated downtown.**

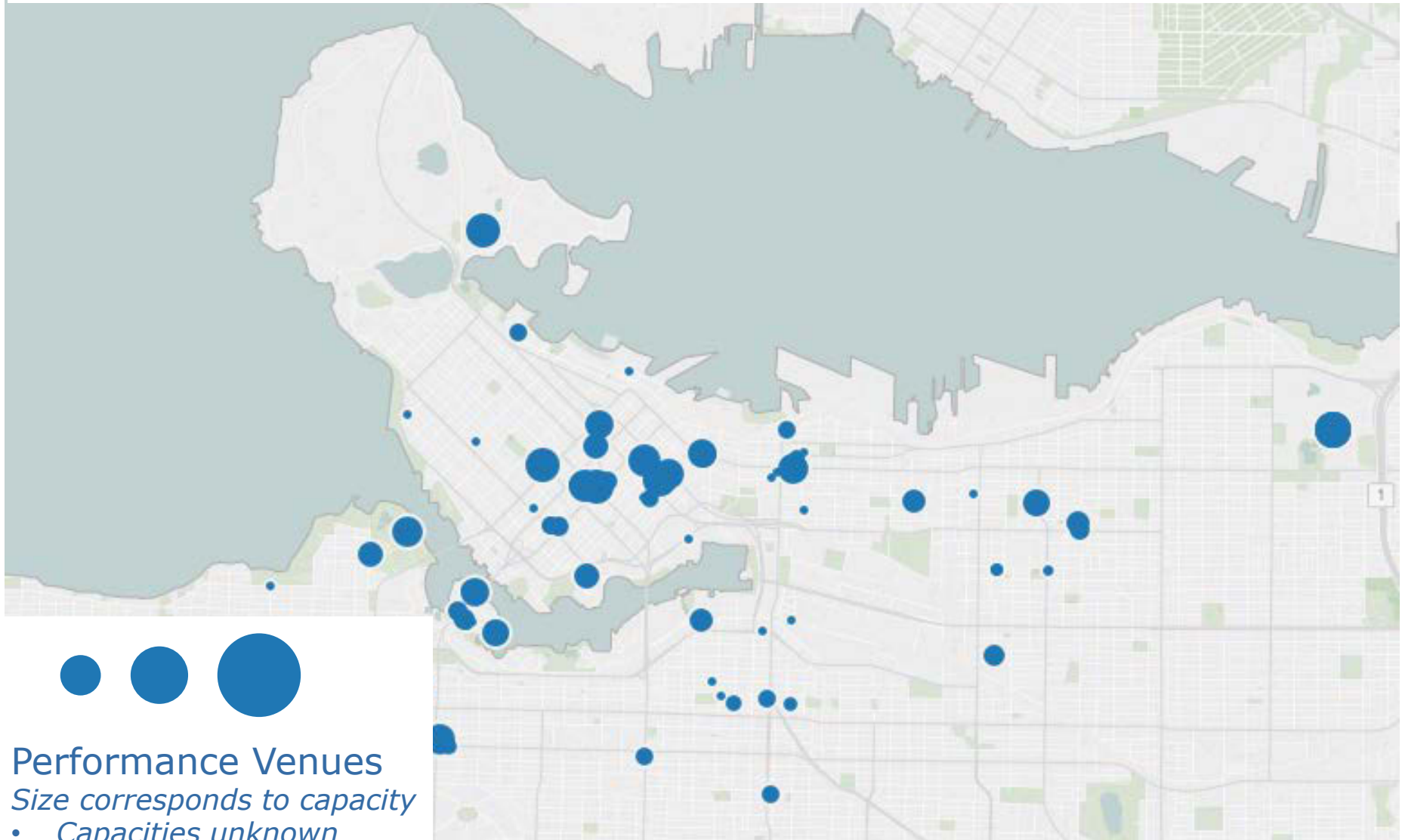


The largest venues are located downtown, but some mid-scale venues are distributed throughout the city.

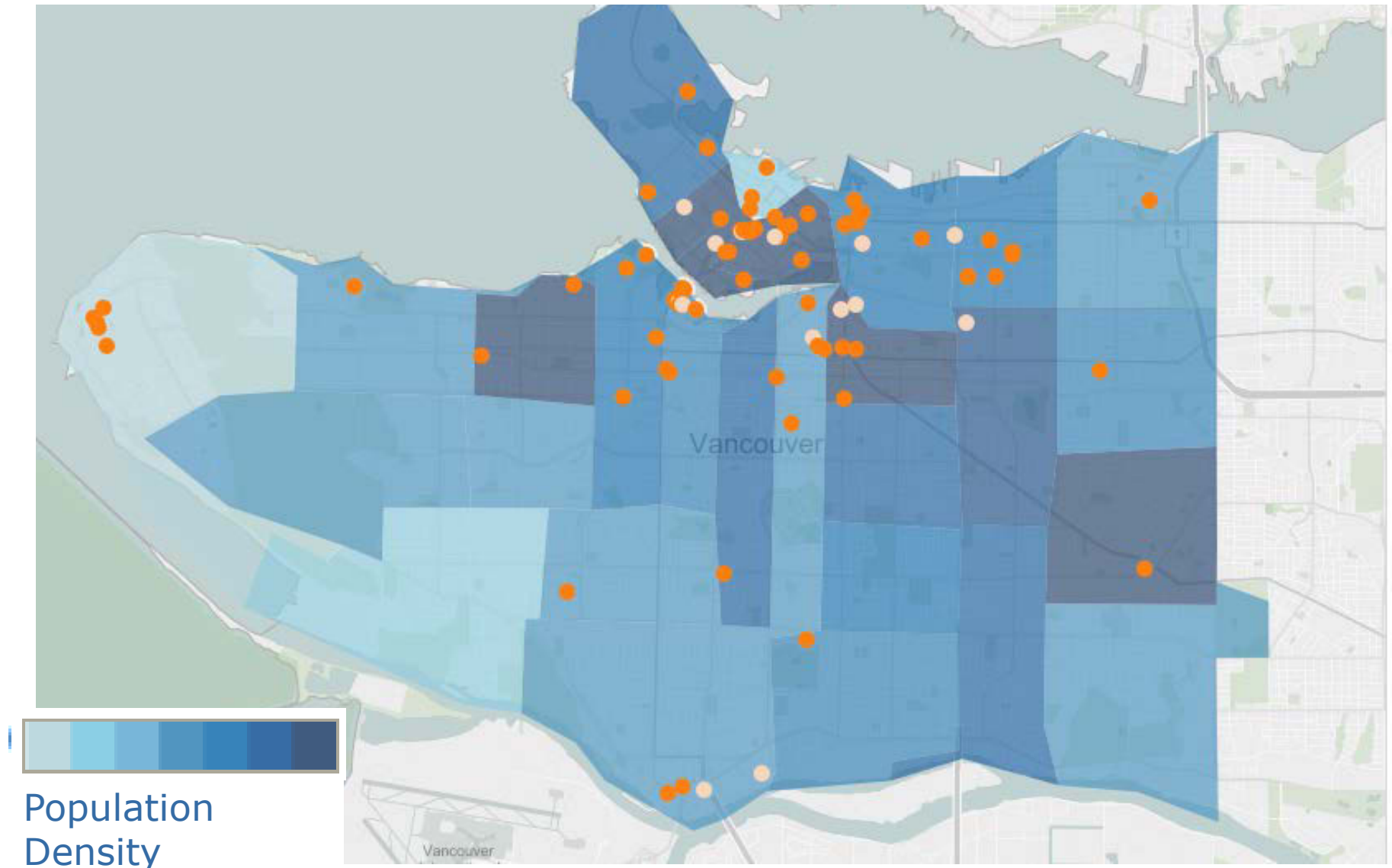


• Capacities unknown

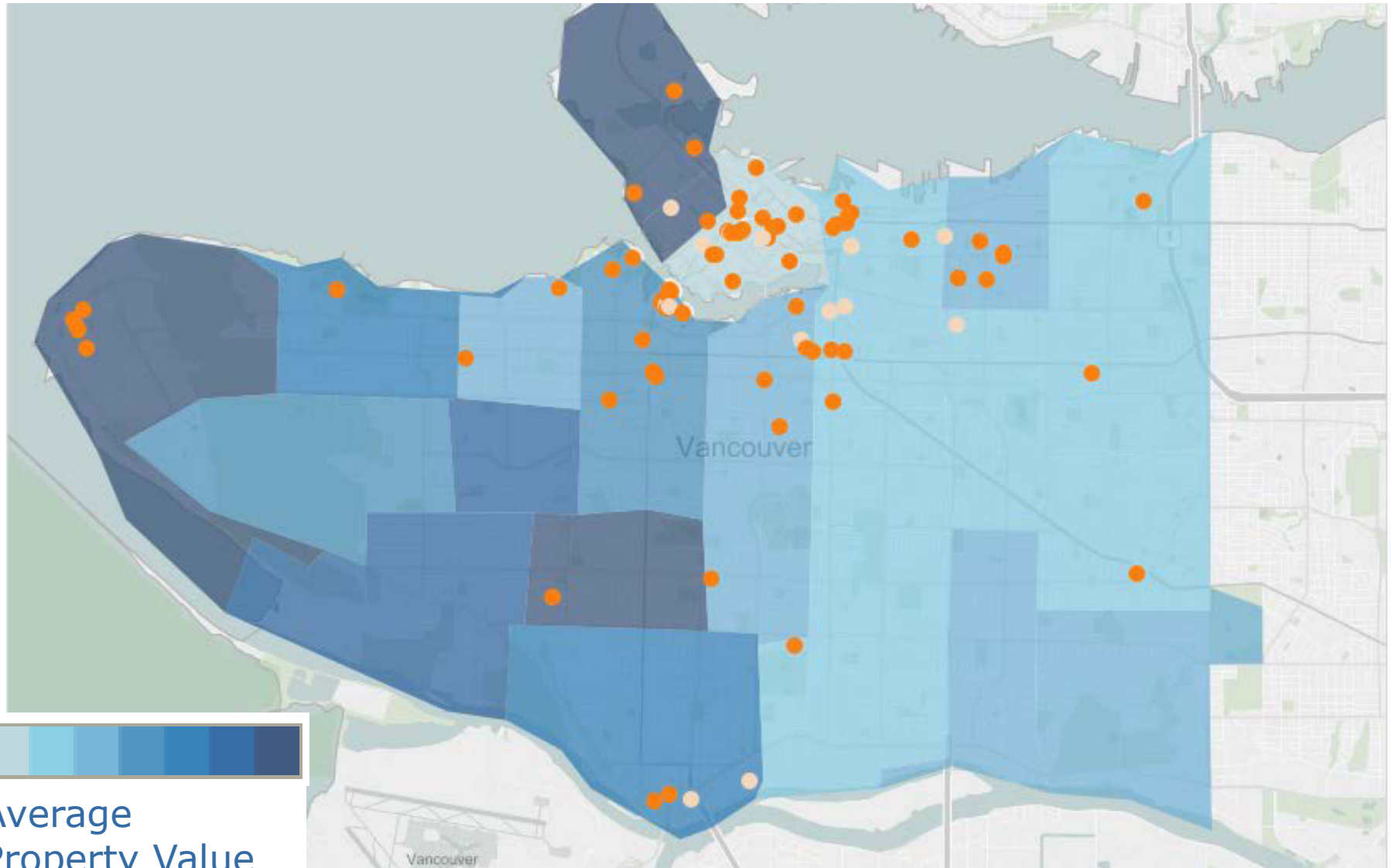
The largest venues are located downtown, but some mid-scale venues are distributed throughout the city.



Performing arts venues are concentrated where **population is the most dense.**



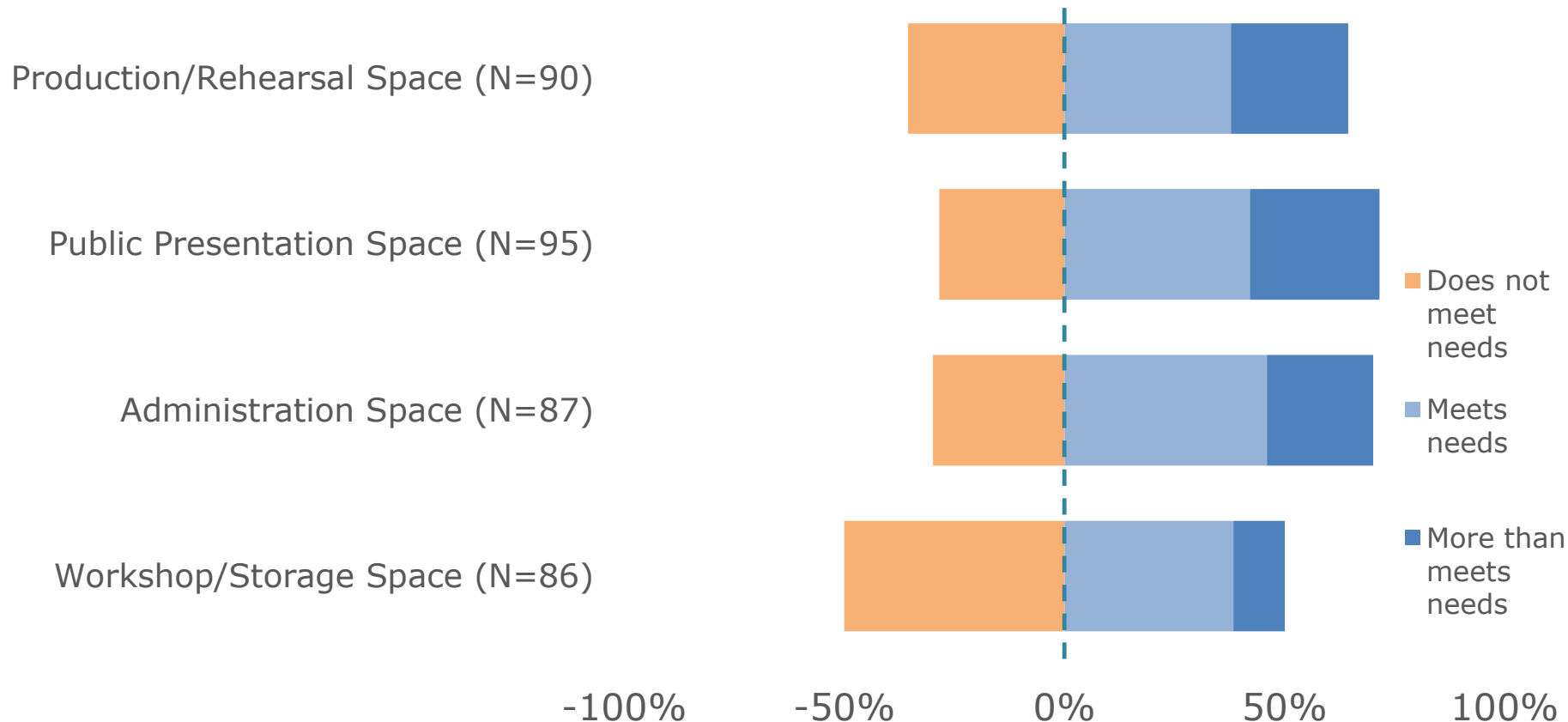
Areas of downtown and east Vancouver with lower average property values have a high density of performing arts spaces.



Condition & Satisfaction

Needs are being met for performance and admin space; there is **less satisfaction with production and workshop space.**

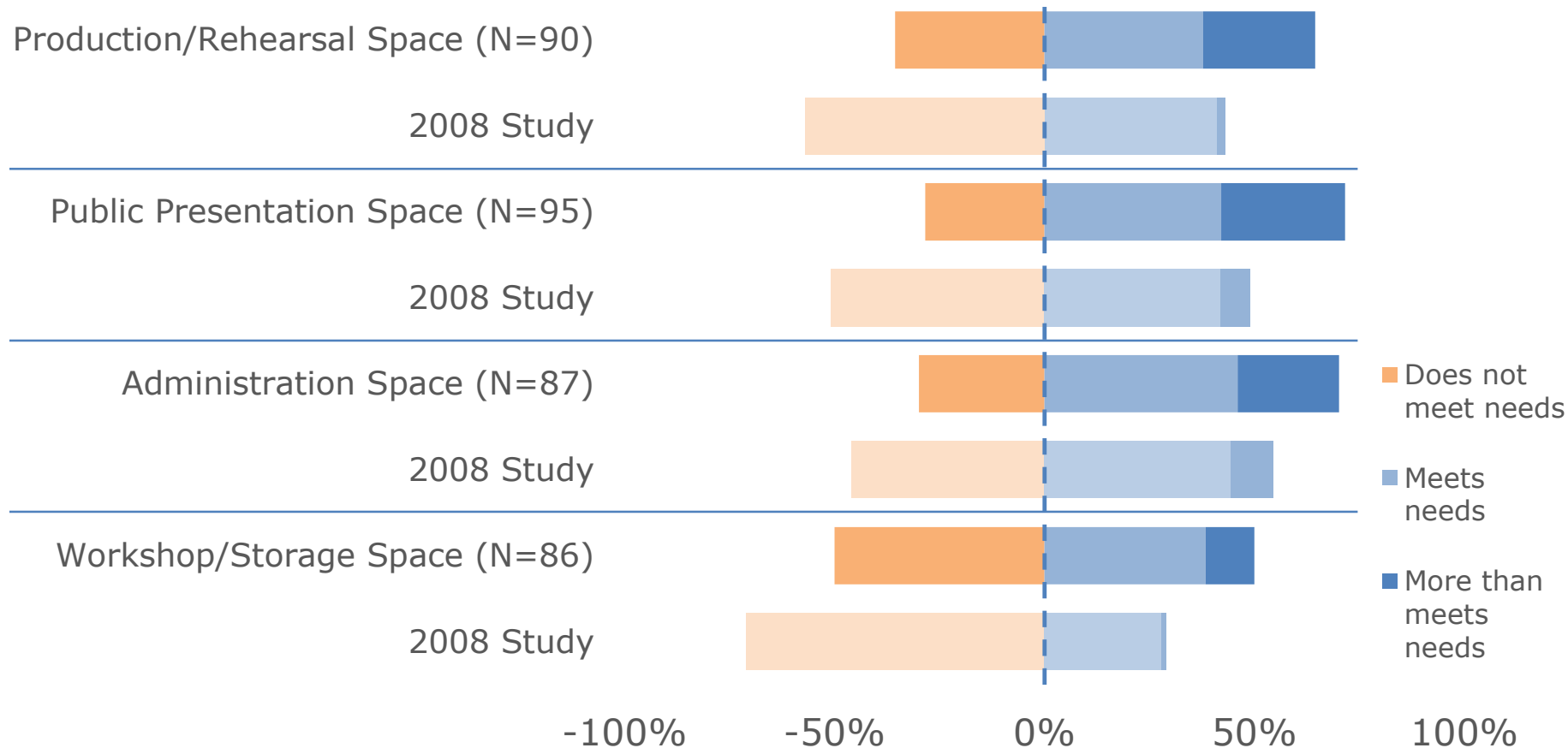
Please rate the general state or condition of the following types of facilities that your organization uses in Vancouver:



Condition & Satisfaction

Satisfaction with venue function is **significantly improved** since 2008.

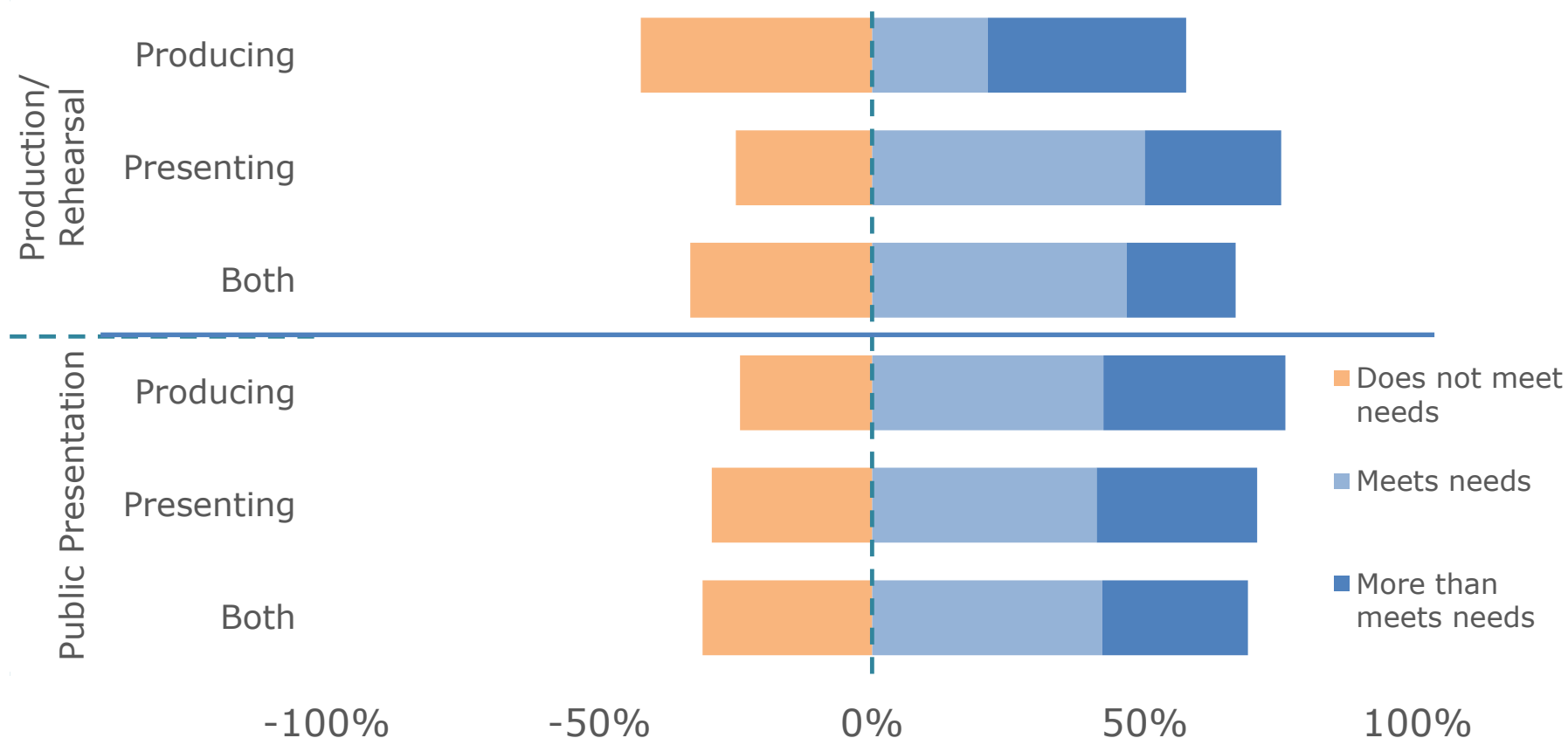
Please rate the general state or condition of the following types of facilities that your organization uses in Vancouver:



Condition & Satisfaction

Producing organizations are less satisfied with production and rehearsal space than presenting organizations.

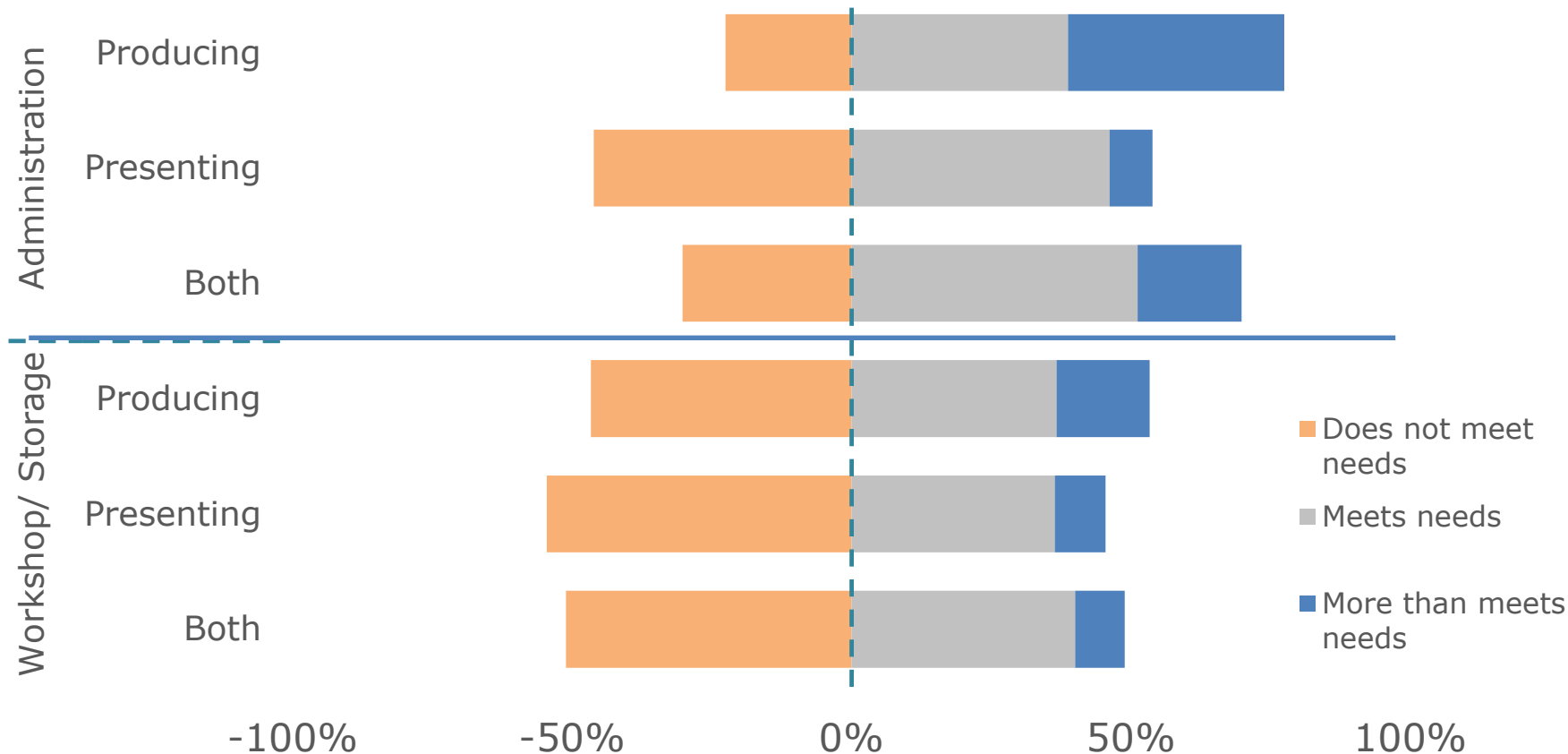
Please rate the general state or condition of the following types of facilities that your organization uses in Vancouver:



Condition & Satisfaction

Presenting organizations report **less satisfaction with administrative space** than producing organizations.

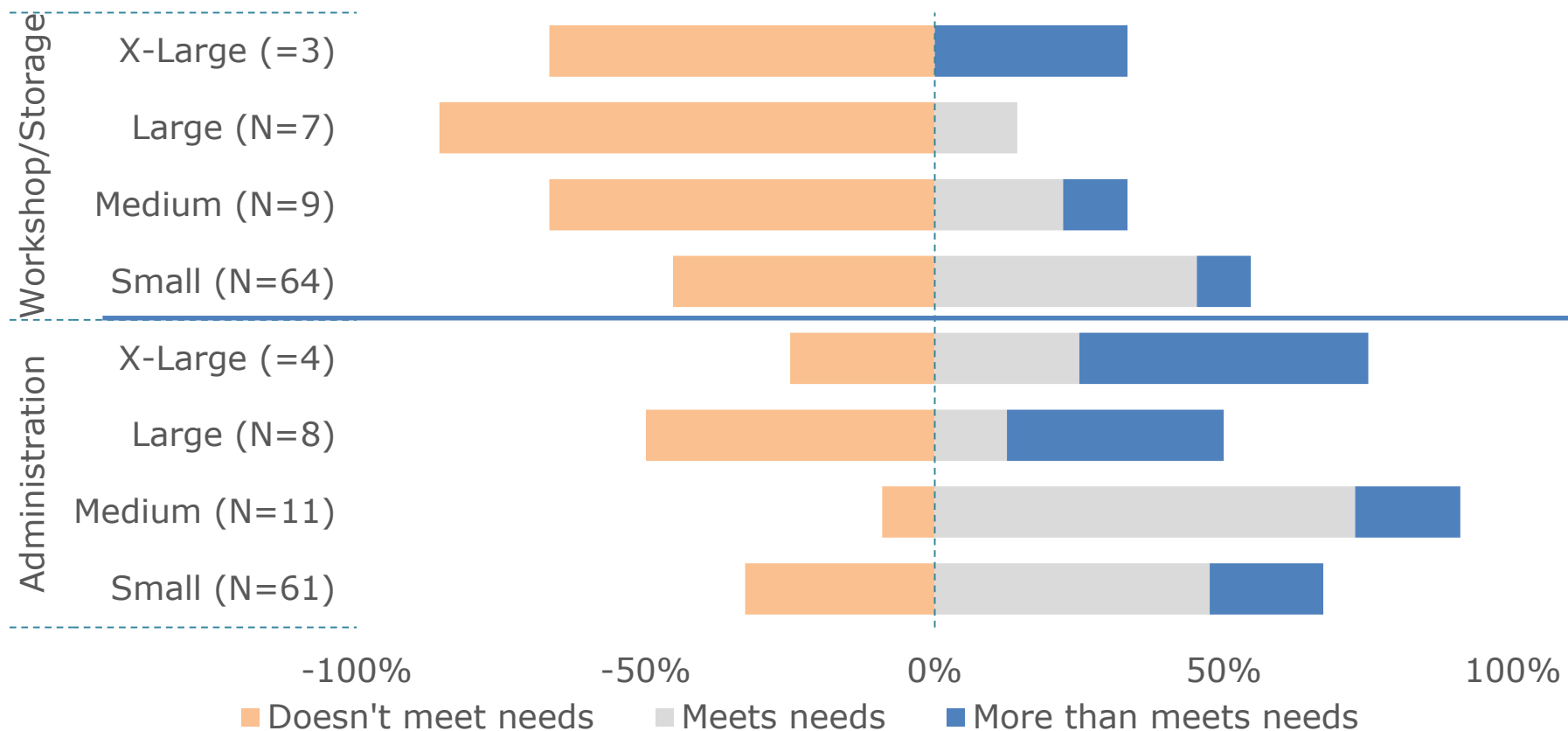
Please rate the general state or condition of the following types of facilities that your organization uses in Vancouver:



Condition & Satisfaction

Smaller organizations were more satisfied with workshop and storage space than large organizations.

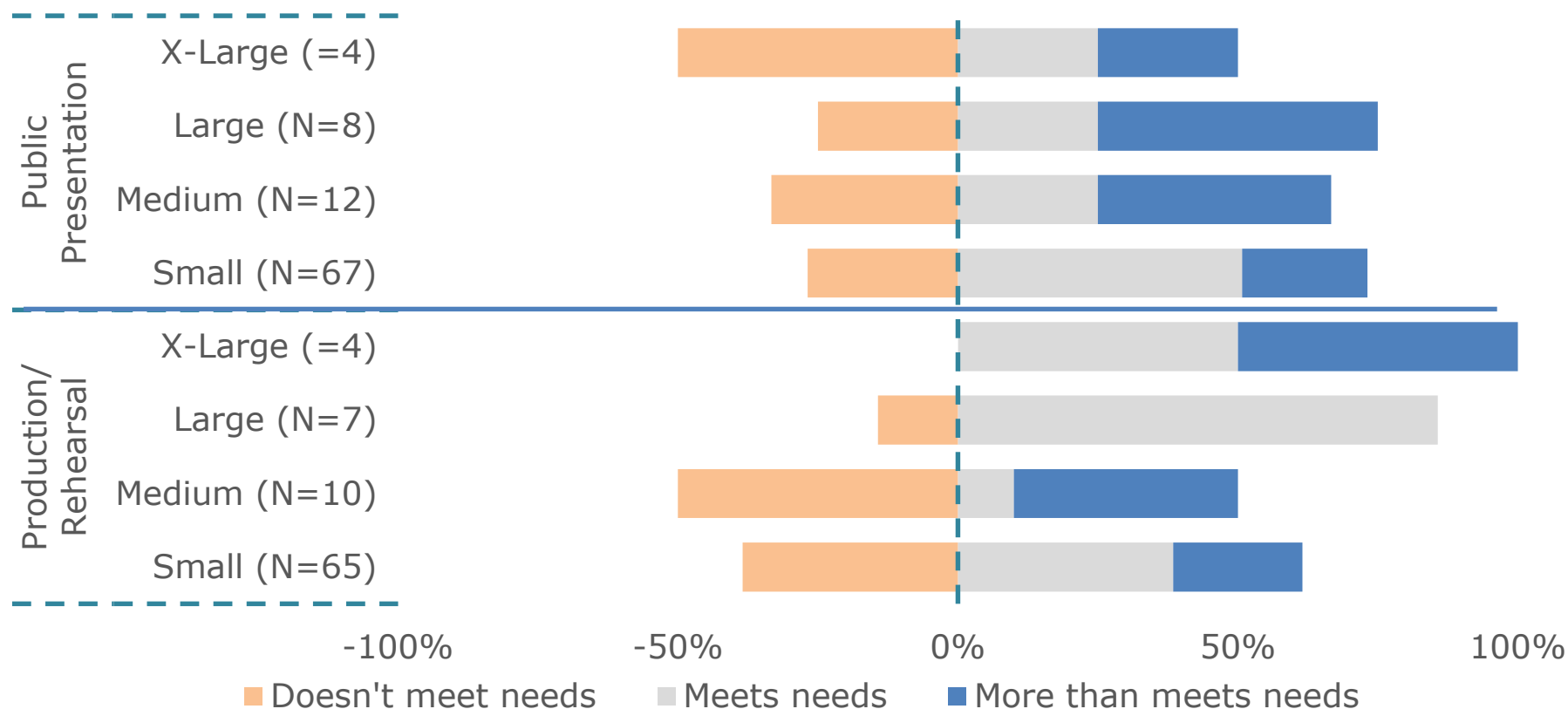
Please rate the general state or condition of the following types of facilities that your organization uses in Vancouver:



Condition & Satisfaction

Larger organizations were more satisfied than smaller organizations with **production and rehearsal space**.

Please rate the general state or condition of the following types of facilities that your organization uses in Vancouver:



Utilization



for the Arts and
Entertainment
Industries

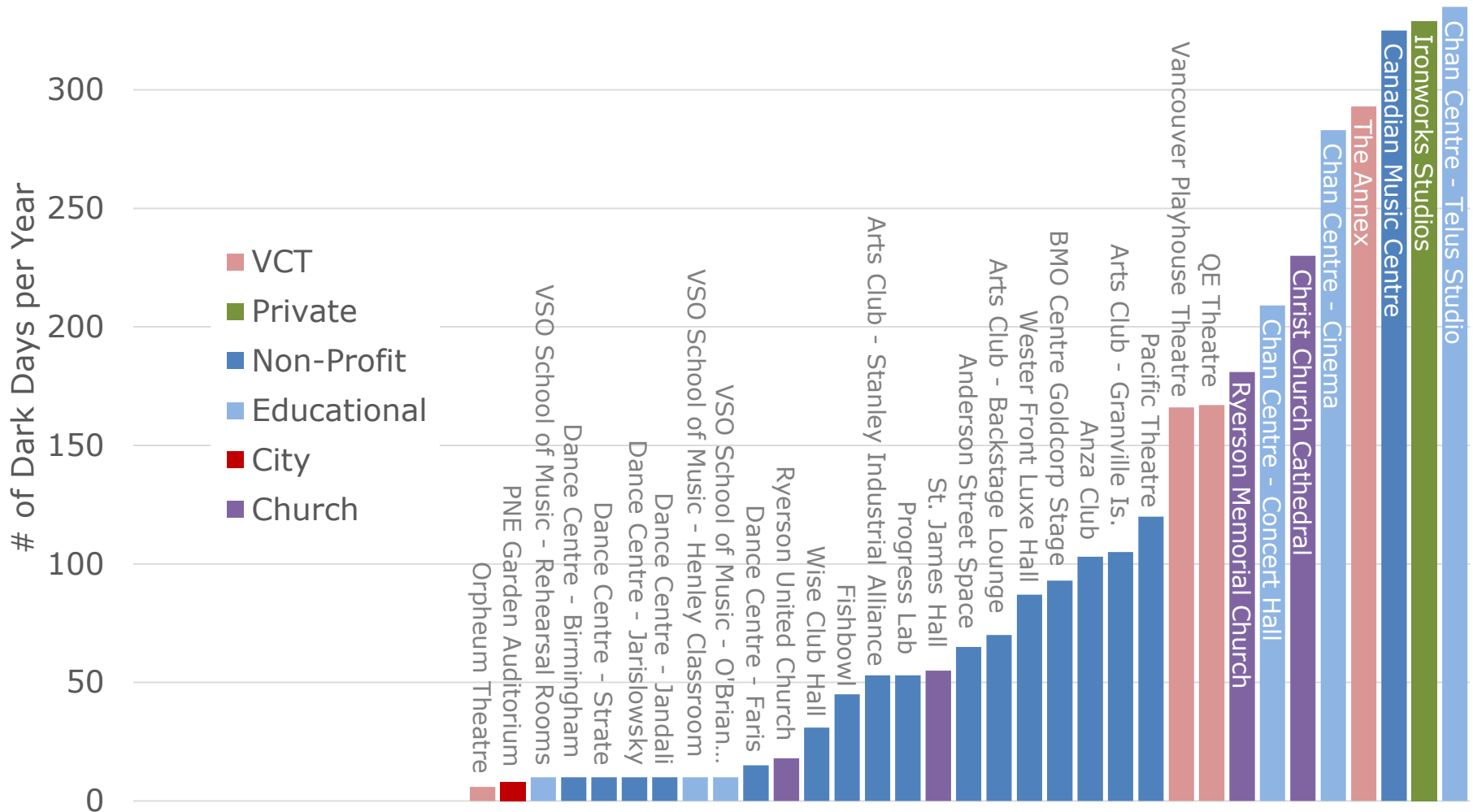
Key Findings

Utilization

- ✳ Of the venues that reported their utilization, **educational venues have the most availability.**
- ✳ VCT venues are **heavily utilized with performance days** relative to other venue types.
- ✳ **Affordability is the most important driver** in selecting space; proximity to amenities was not seen as important.
- ✳ **Cost is more important to smaller organizations**, while equipment availability and theatre function is more important to larger organizations
- ✳ Most organizations see **public presentation space as too expensive**, but many would be **willing to pay more for administrative or storage space.**

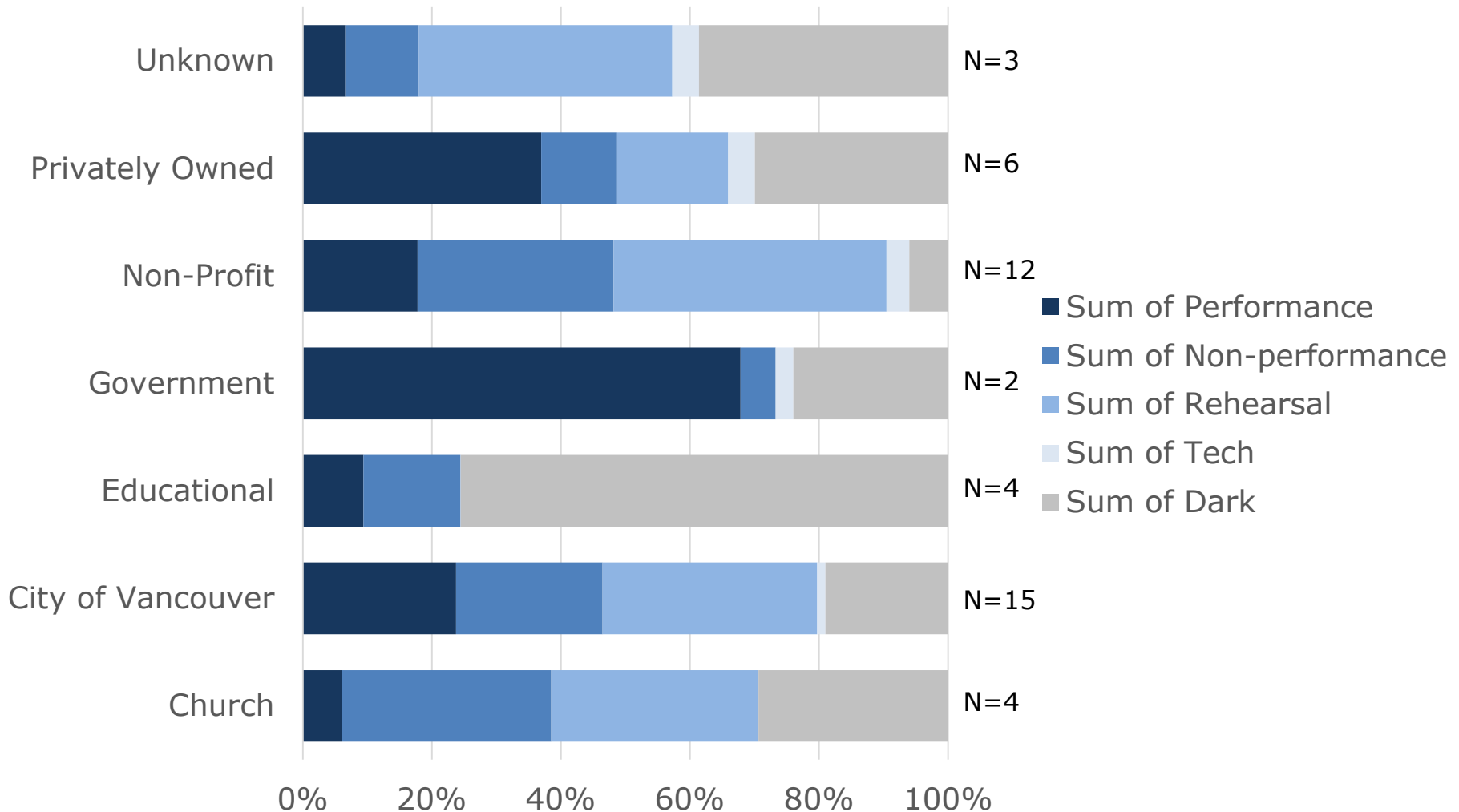
Utilization

Of the 48 venues that responded to questions about total utilization, the least-utilized appear to be **VCT venues and educational venues.**



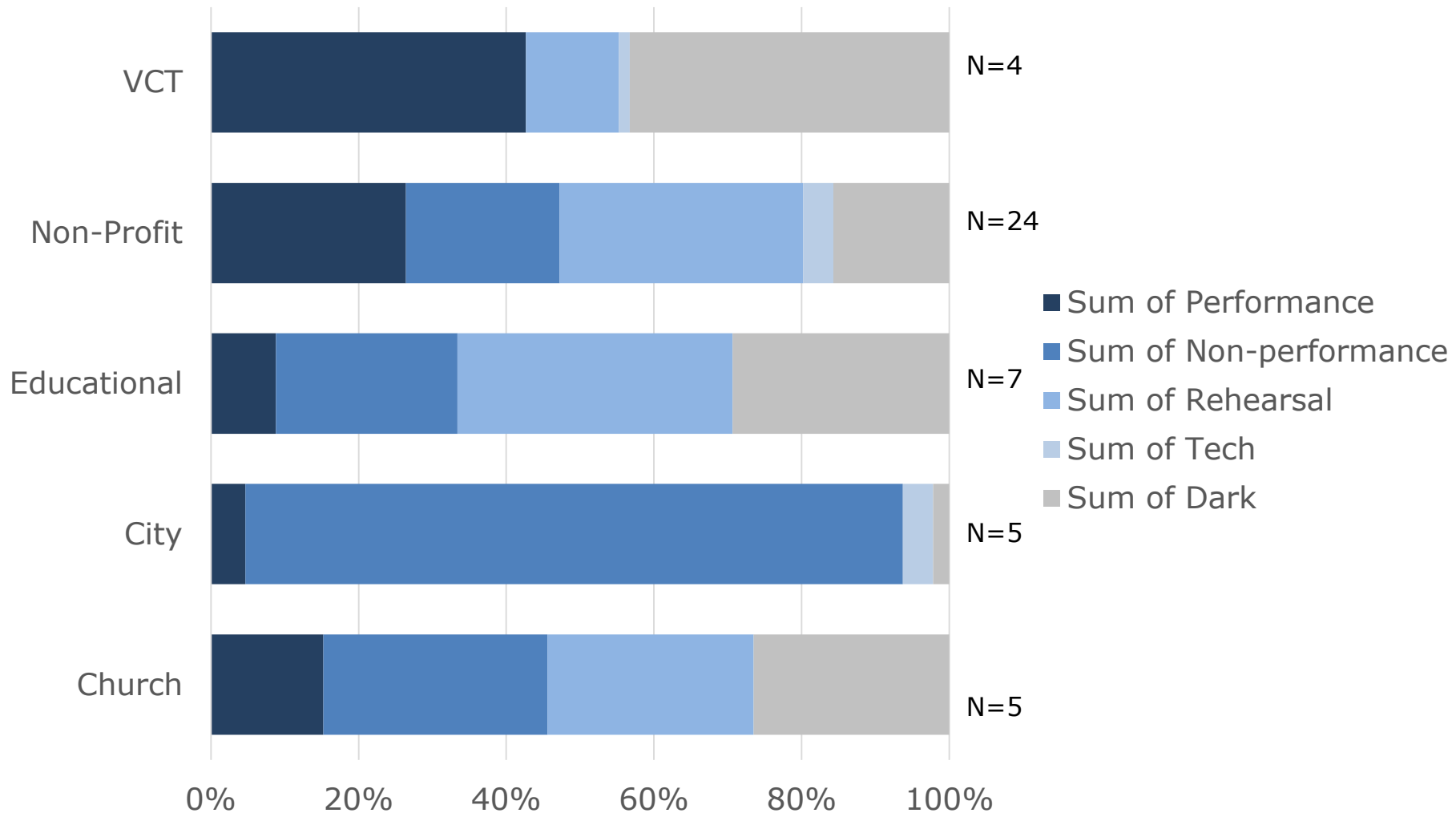
Utilization by Owner Type

Venues owned by educational institutions appear to have the most availability.



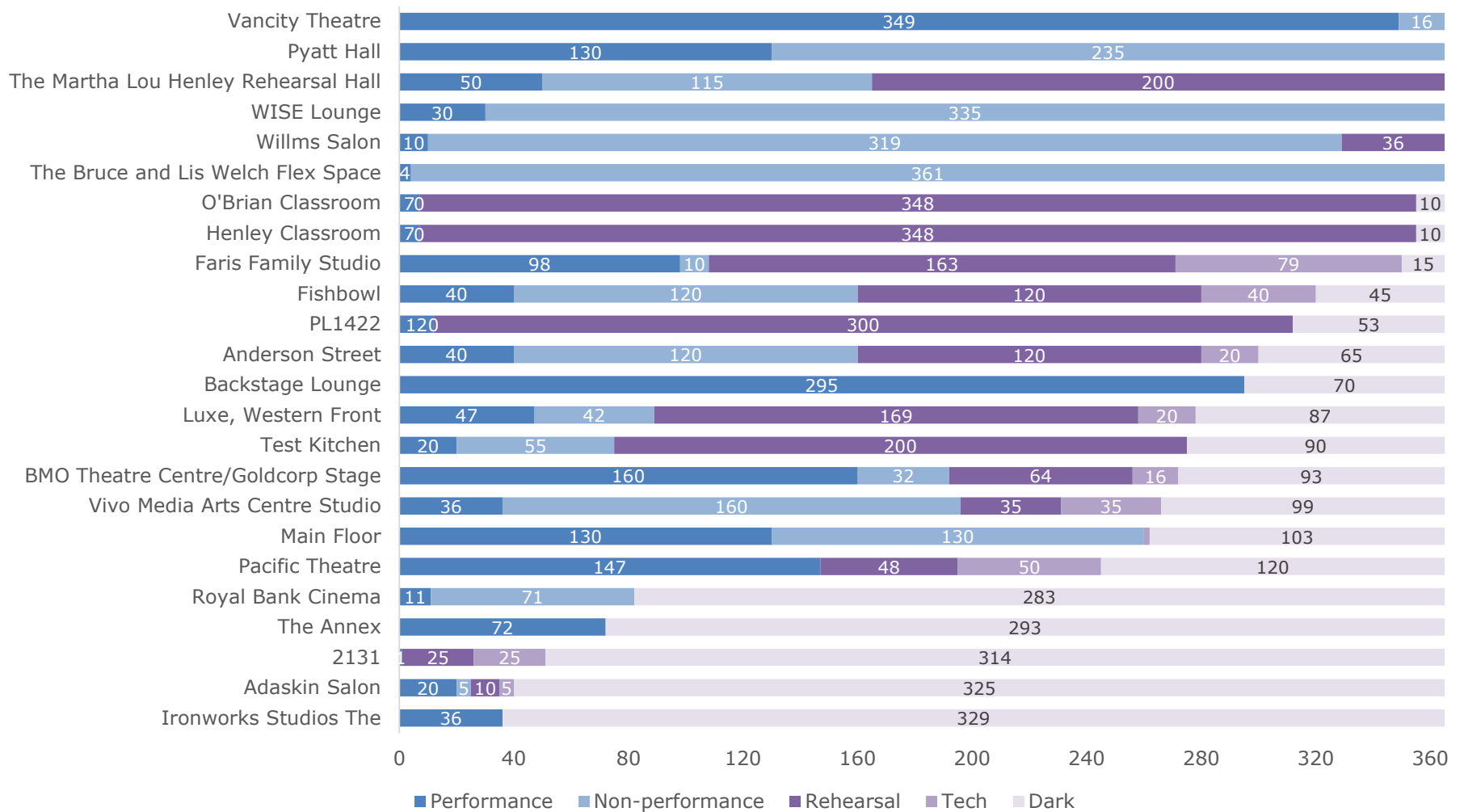
Utilization by Operator Type

VCT venues are heavily utilized with performance days, relative to other operator types.



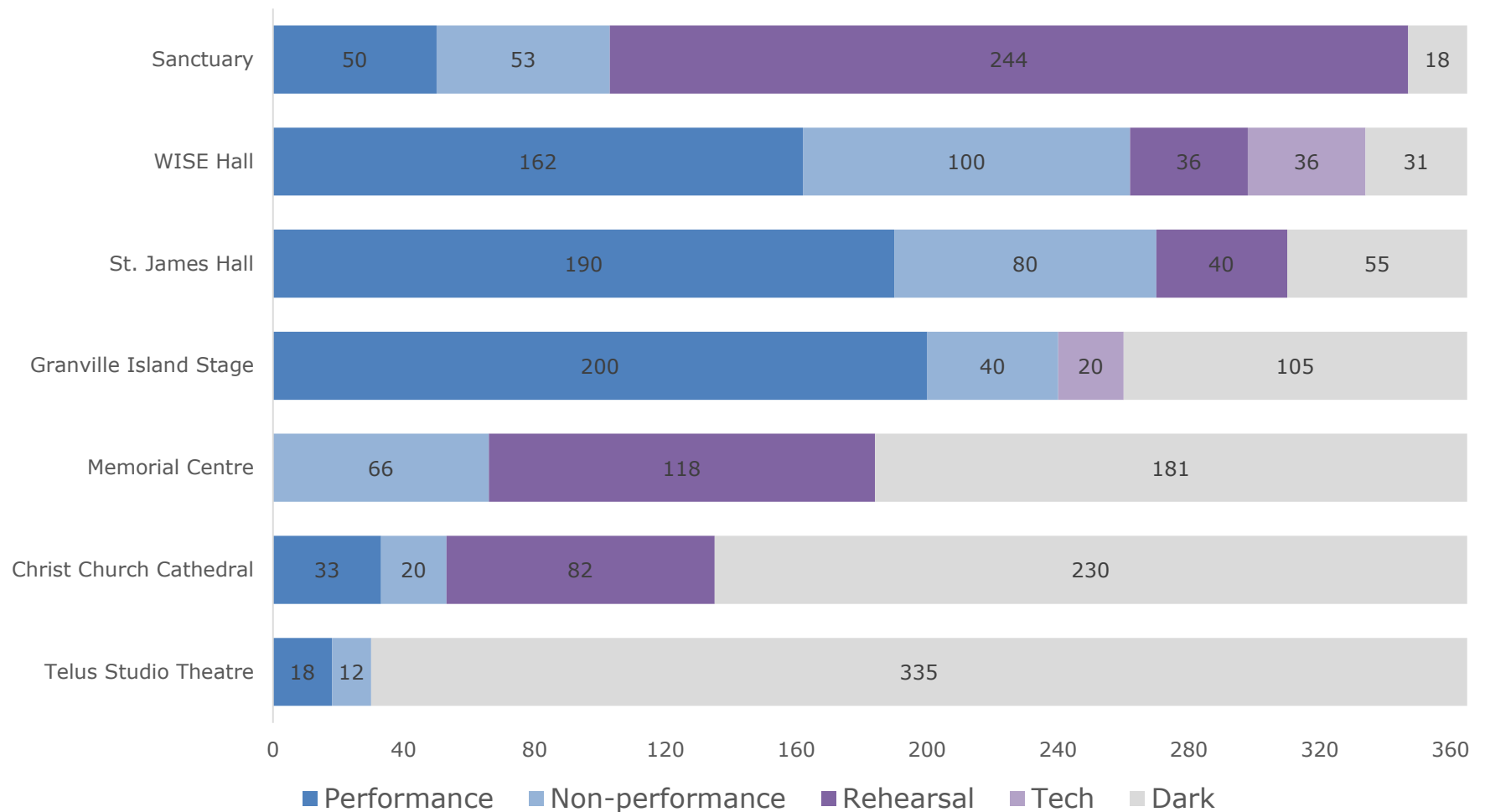
Venue use by capacity

Yearly Activity - Less than 250 Seats
of Days by Use Type



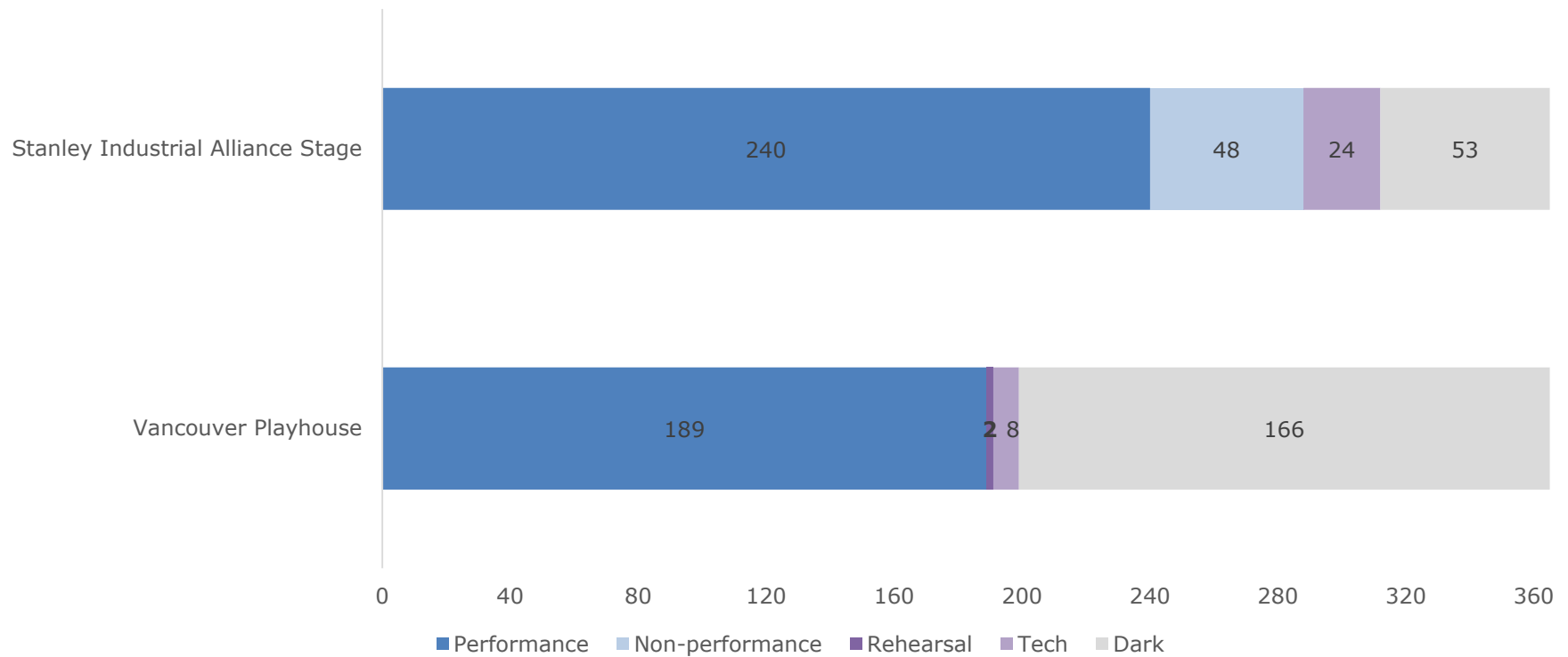
Venue use by capacity

**Yearly Activity - 250 to 499 Seats
of Days by Use Type**



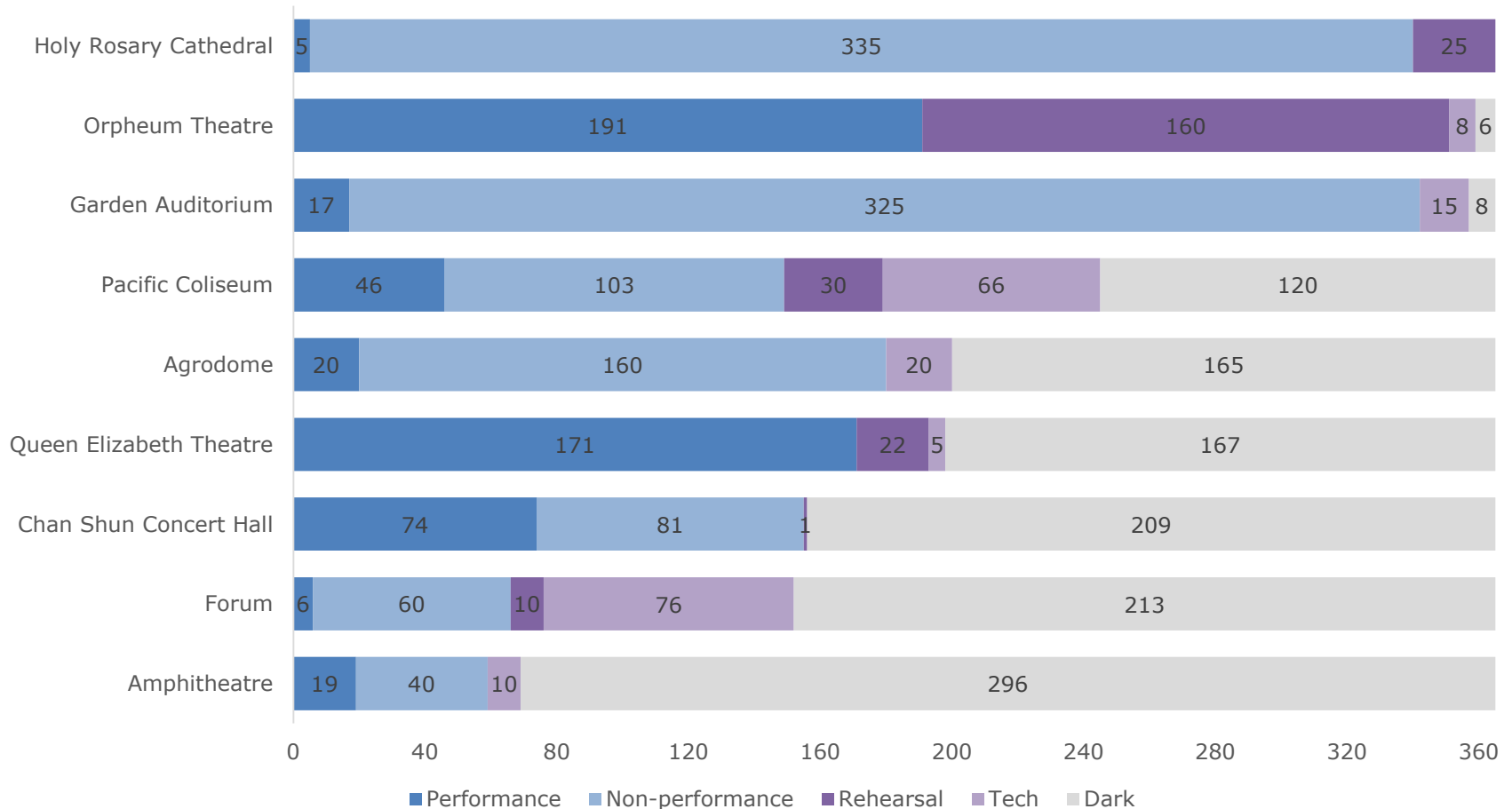
Venue use by capacity

Yearly Activity – 500 to 799 Seats # of Days by Use Type



Venue use by capacity

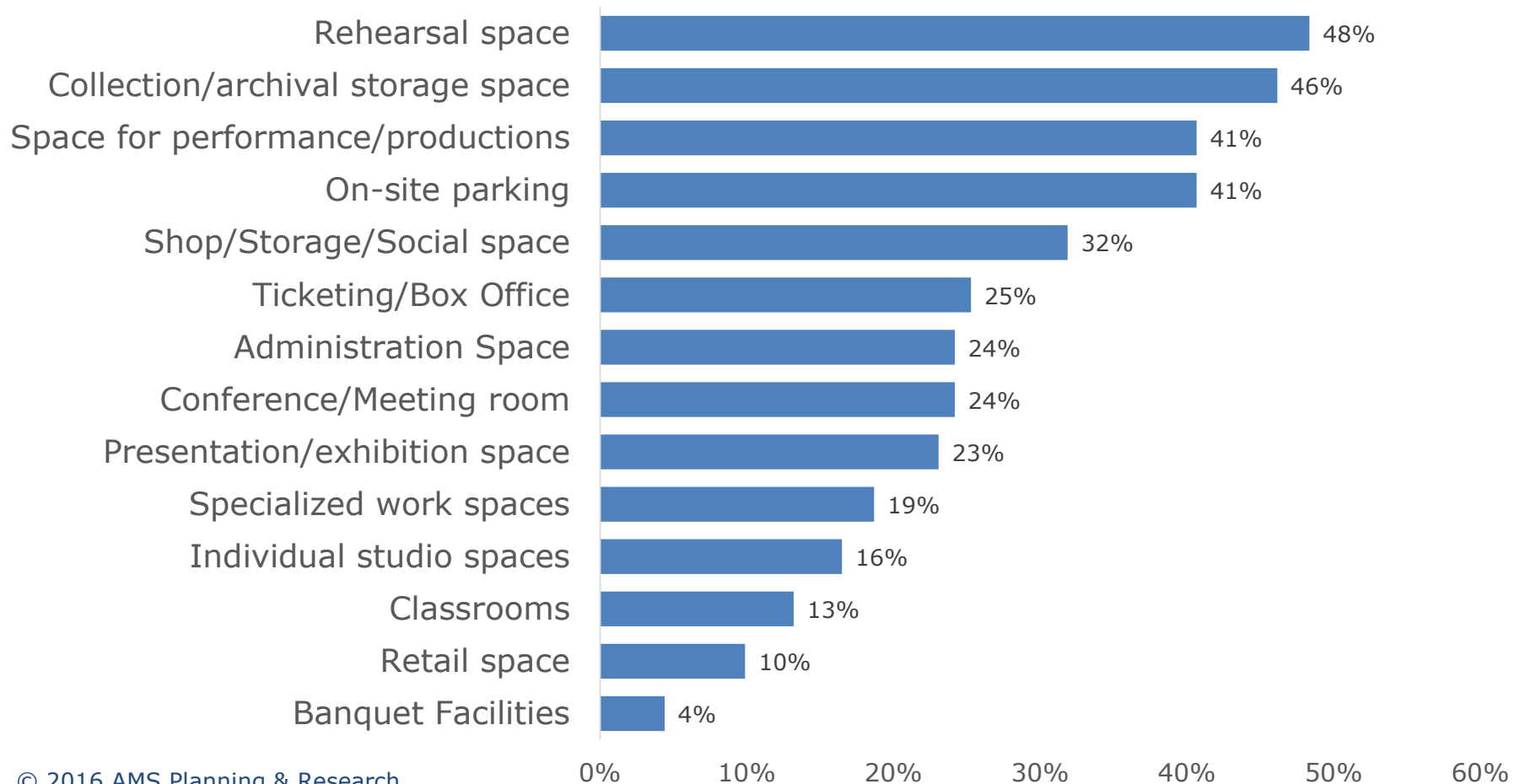
Yearly Activity - 800 or More Seats # of Days by Use Type



Availability

Nearly **half of venue users** felt that **rehearsal space and storage space** are missing in Vancouver.

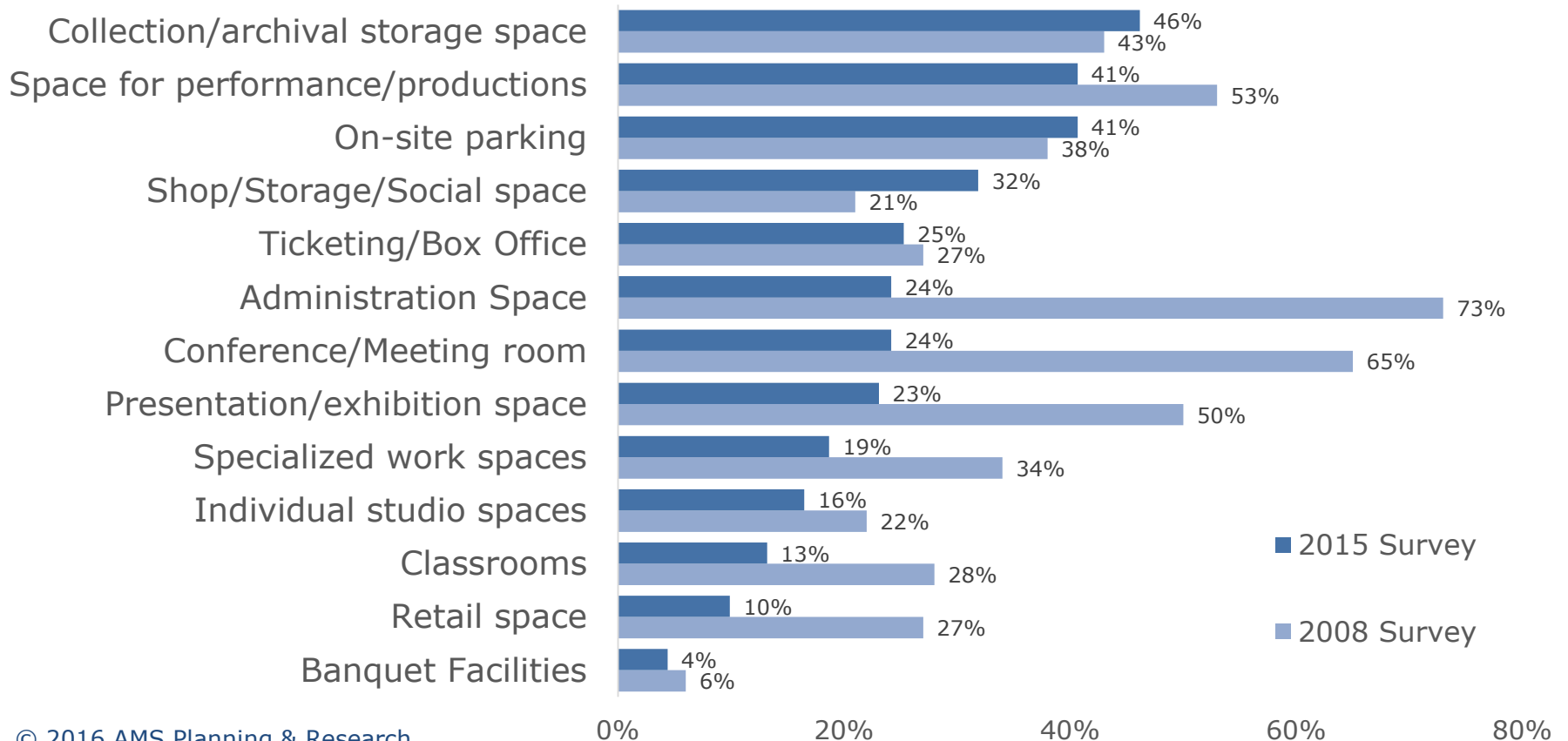
Which of the following types of space do you feel are missing?
(N=91)



Availability

Compared to the 2008 study, **we see sharp differences in needs for administration, meeting, and exhibition space** (possibly due to the wider scope of the 2008 work). Need for performance space has declined.

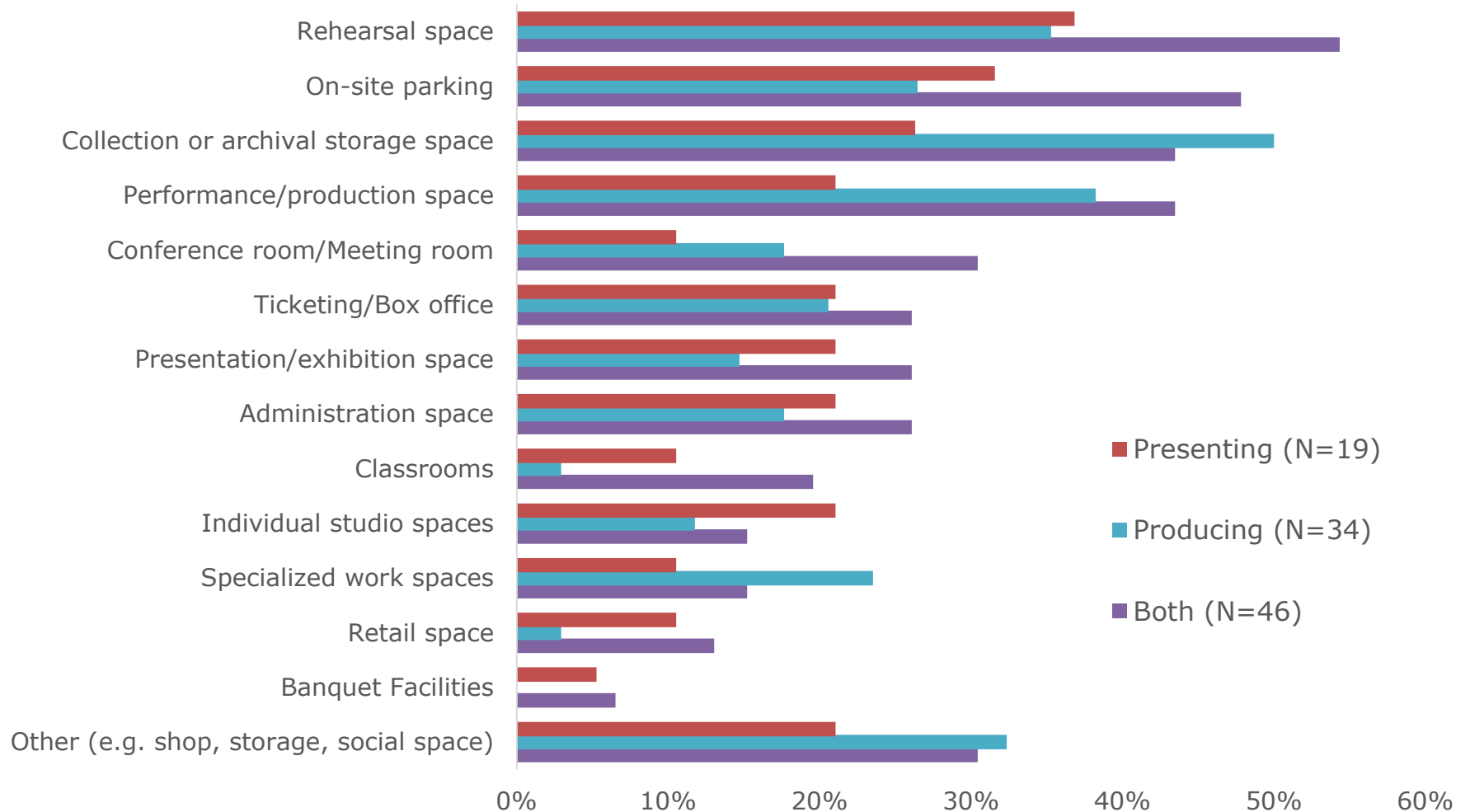
Which of the following types of space do you feel are missing?



Availability

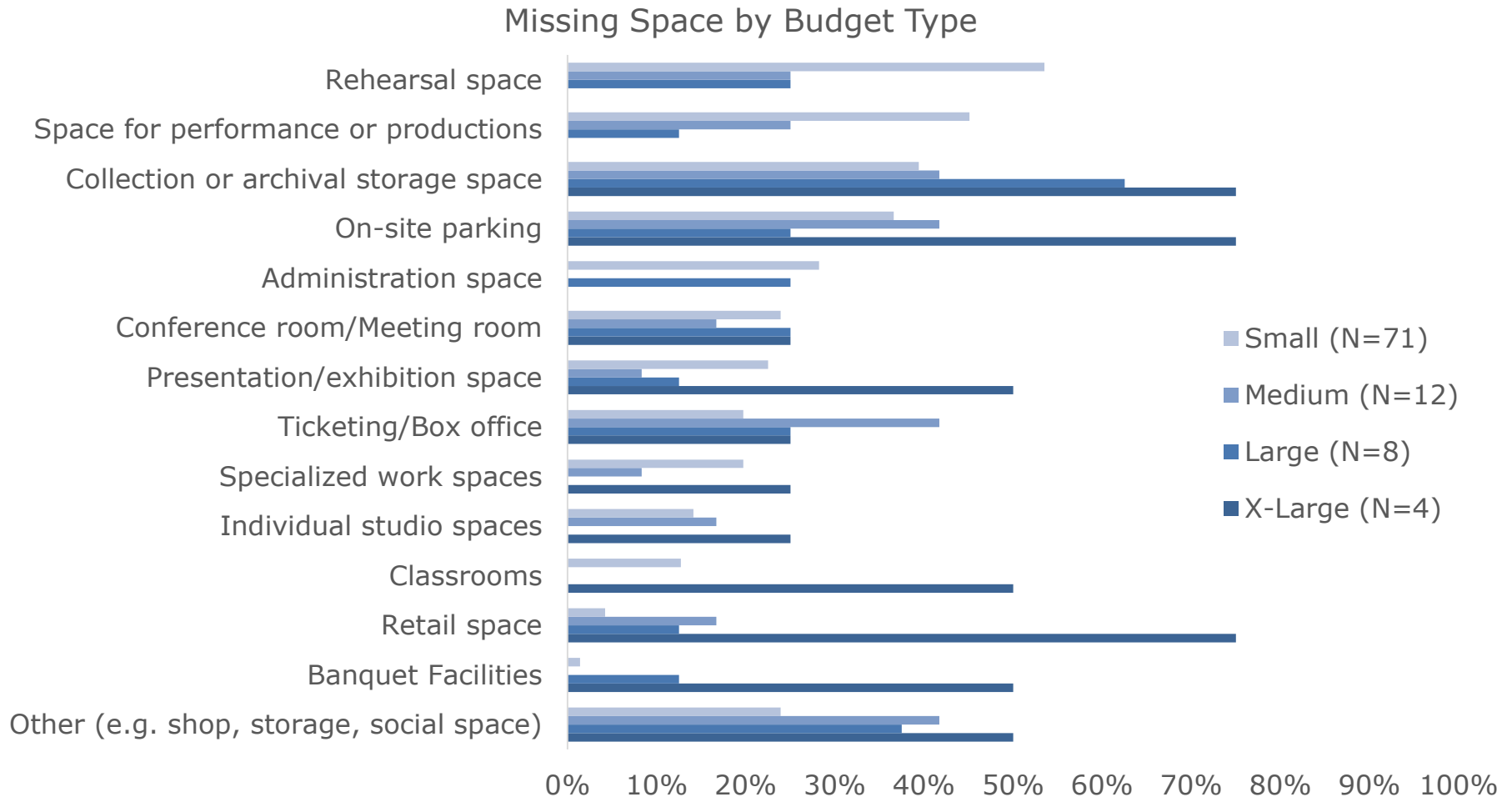
Storage and production space was most needed by producing organizations; **rehearsal space** is also in great demand.

Missing Space by Organization Type



Availability

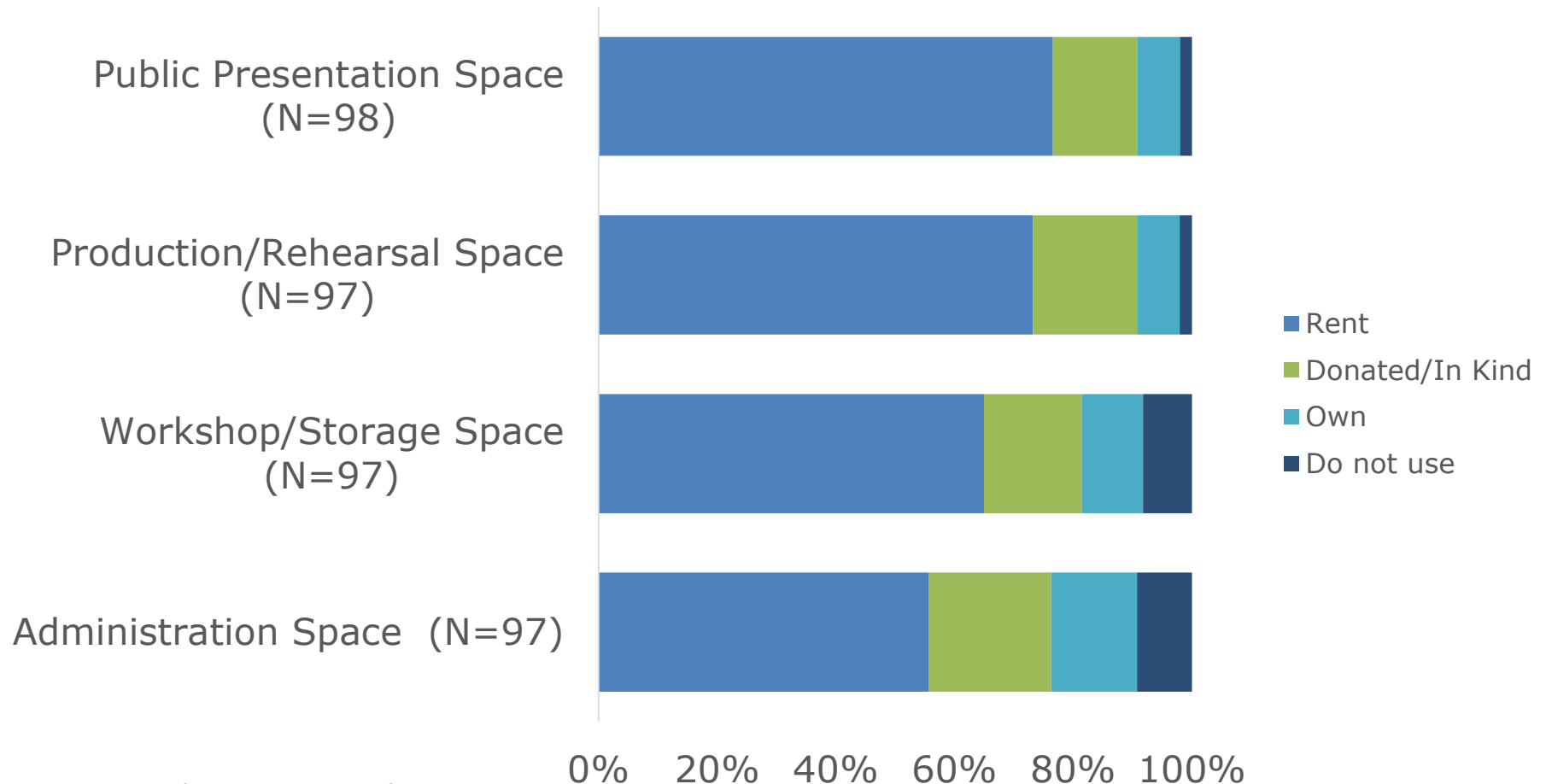
Small organizations **need rehearsal space the most**; storage space is desired by all organization size cohorts.



Availability

Most venue users rent their spaces, especially performance space.

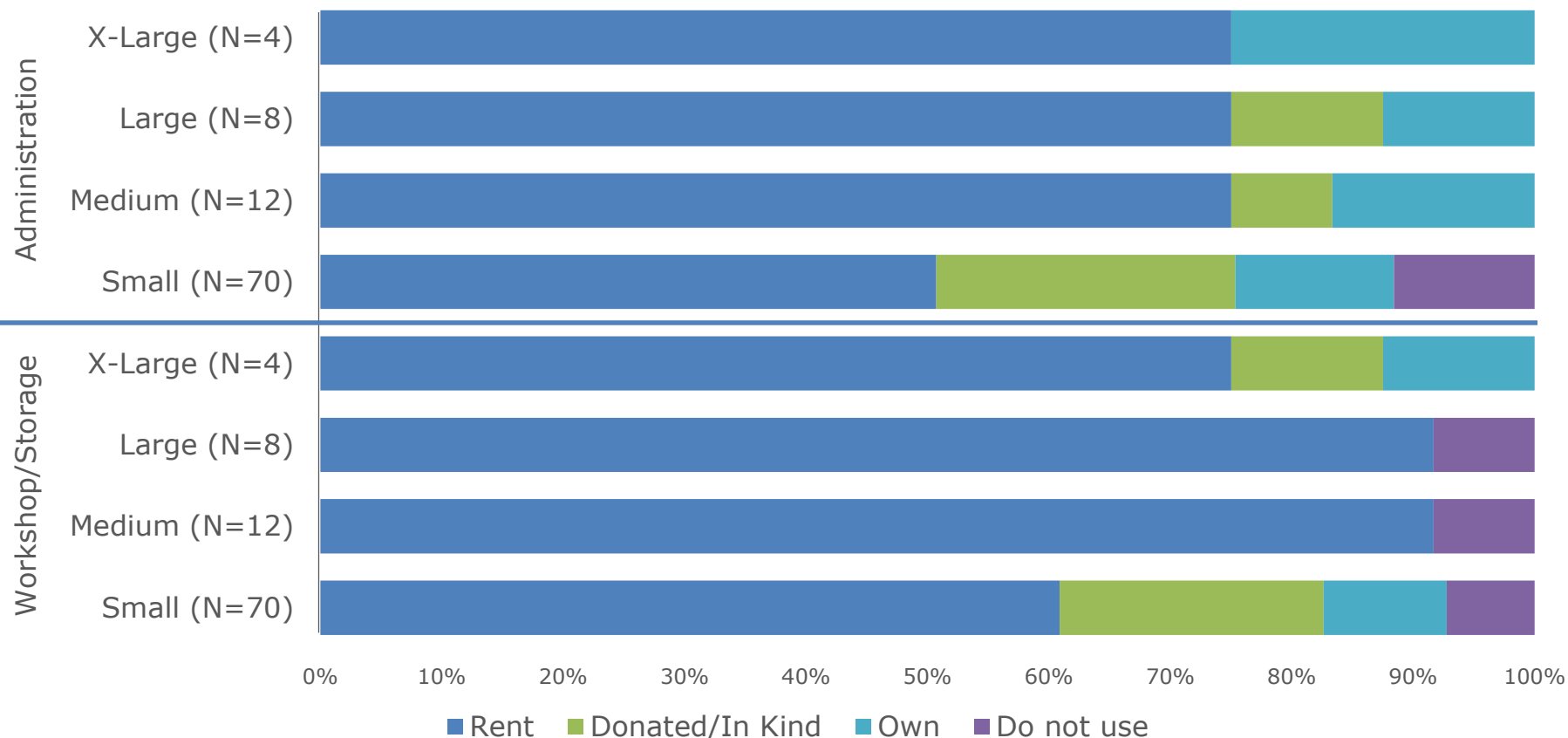
Of the following types of facility space, please describe your organization's usage arrangement for each:



Availability

Smaller organizations are more likely to have **donated or free space**.

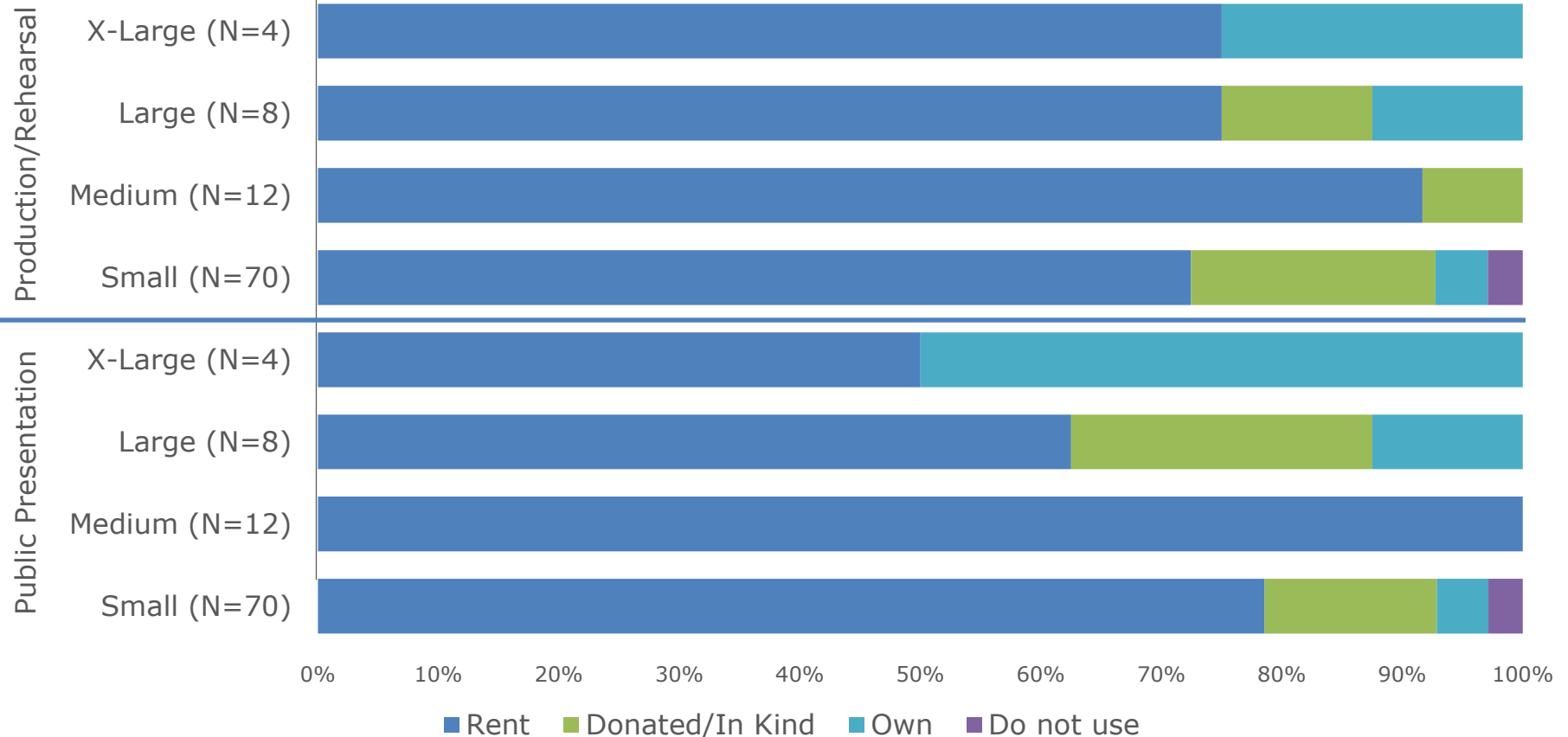
Of the following types of facility space, please describe your organization's usage arrangement for each:



Availability

Larger organizations are much more likely to **own their presentation space**, but no medium-sized organizations do.

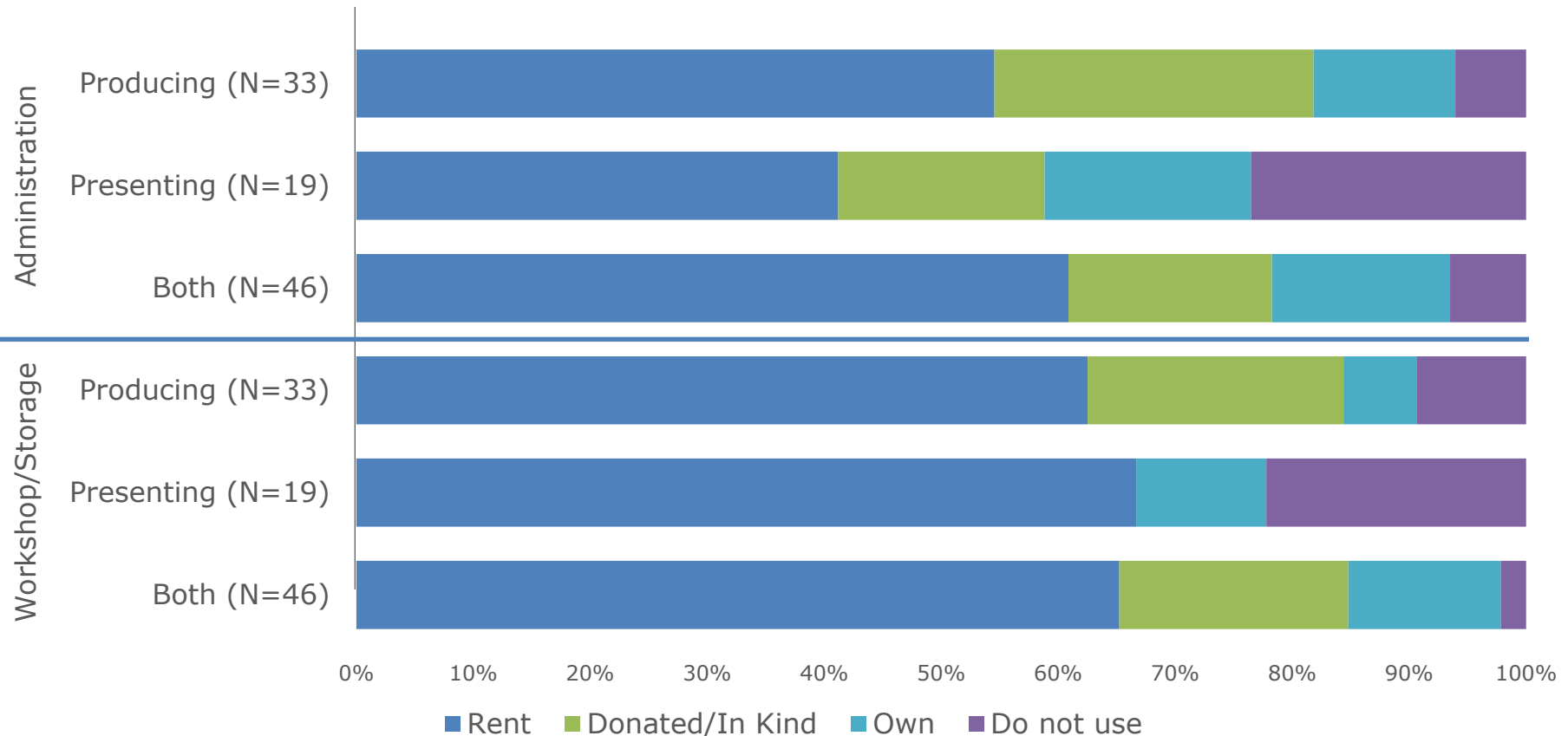
Of the following types of facility space, please describe your organization's usage arrangement for each:



Availability

Presenting organizations are **less likely to use administrative and workshop space.**

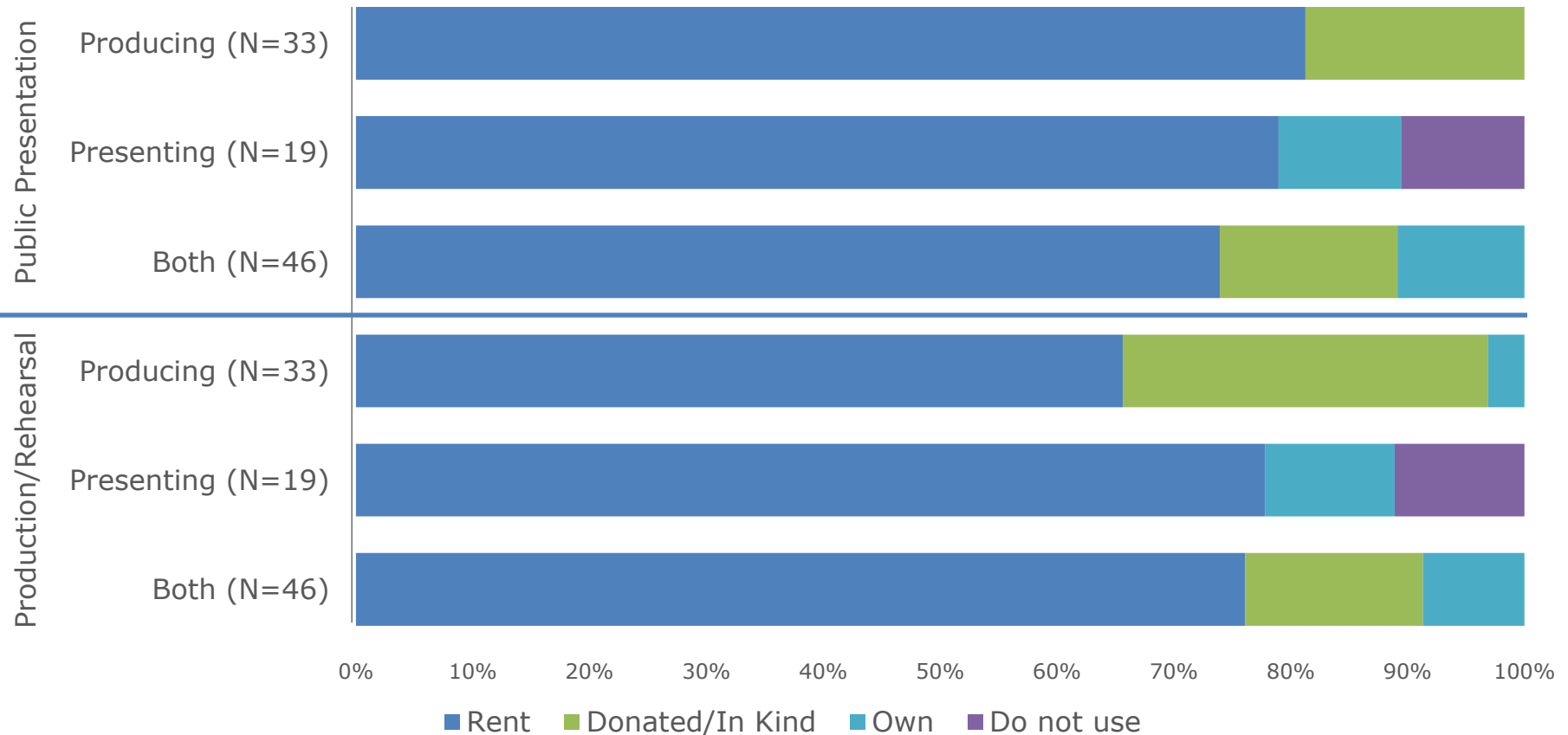
Of the following types of facility space, please describe your organization's usage arrangement for each:



Availability

Producing organizations have **access to donated and in-kind presentation and production space.**

Of the following types of facility space, please describe your organization's usage arrangement for each:



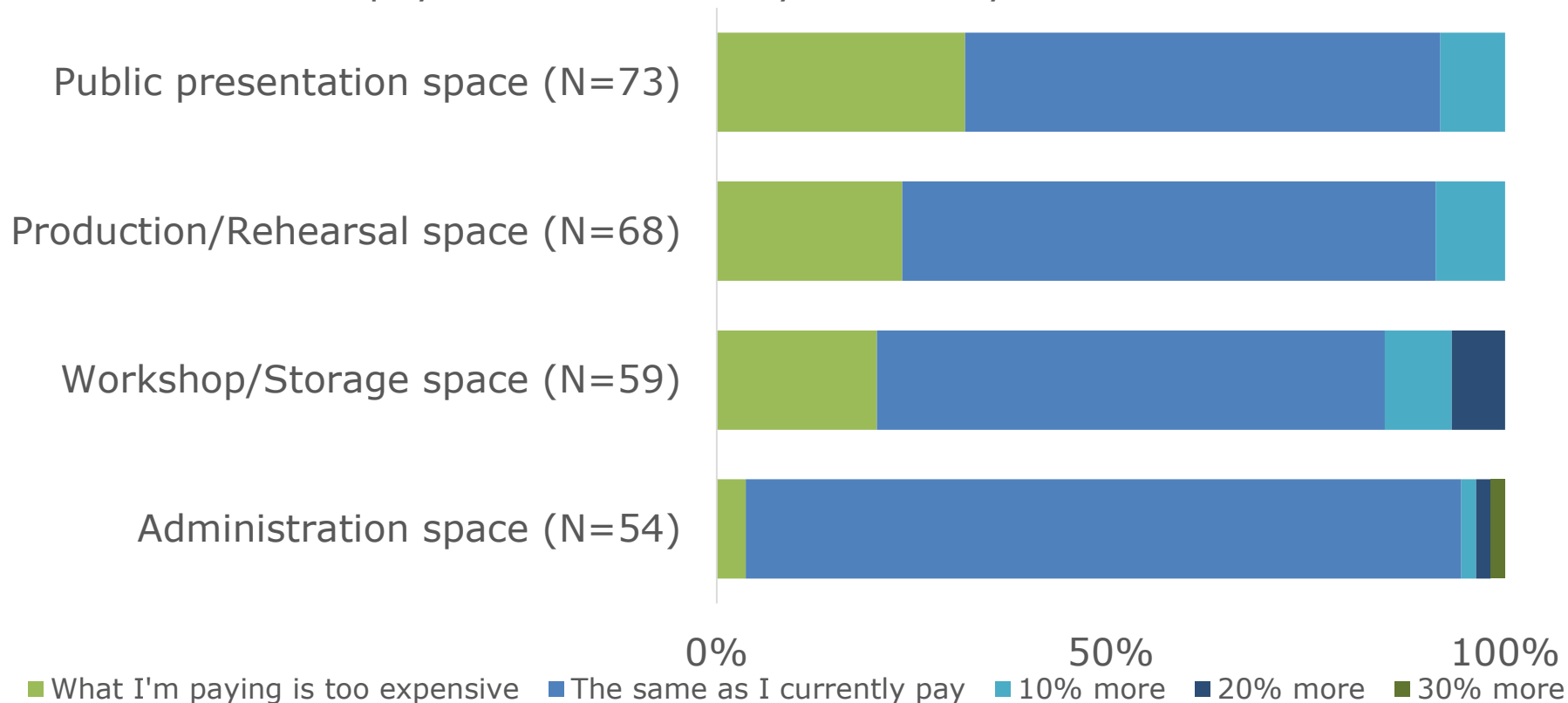
Affordability

Production and rehearsal space has the highest monthly cost, while storage space presents the least cost impact to organizations. However, **presentation space is the most costly overall**, with a median cost of \$1,500 per event.

	Administrative Space	Workshop & Storage Space	Production & Rehearsal Space	Presentation Space
No. of Organizations	46	39	50	52
Median	\$675	\$350	\$6,000	\$1,500
Mean	\$2,310	\$3,150	\$22,275	\$6,755
	Per Month	Per Month	Per Month	Per Event

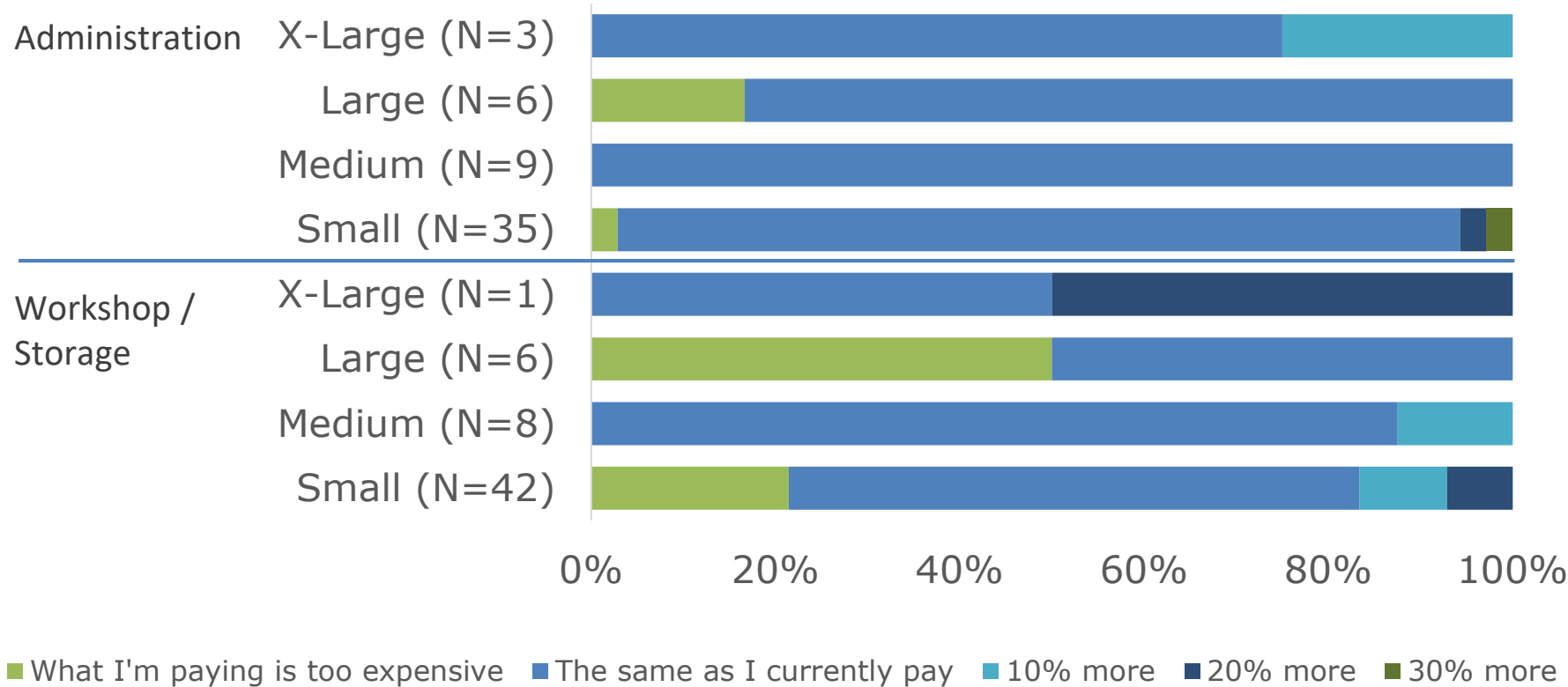
Organizations are generally unable to pay more than their current rates for different kinds of space; some organizations would be willing to pay more for workshop/storage and administrative space.

Please describe how much your organization would be willing to pay for use of a facility that met your needs?



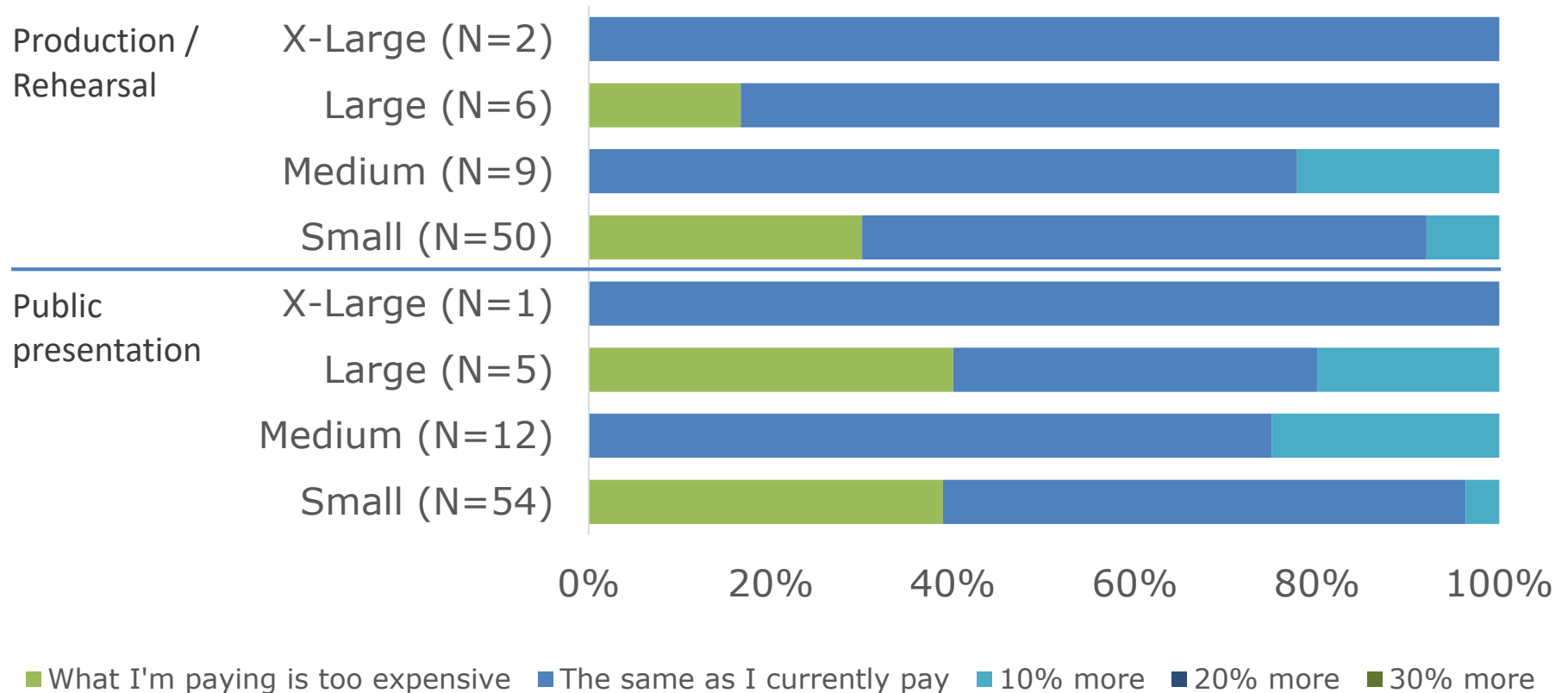
Nearly 17% of organizations with budgets under \$500K indicated they would be willing to pay at least 10% more for Workshop / Storage space.

Please describe how much your organization would be willing to pay for use of a facility that met your needs?



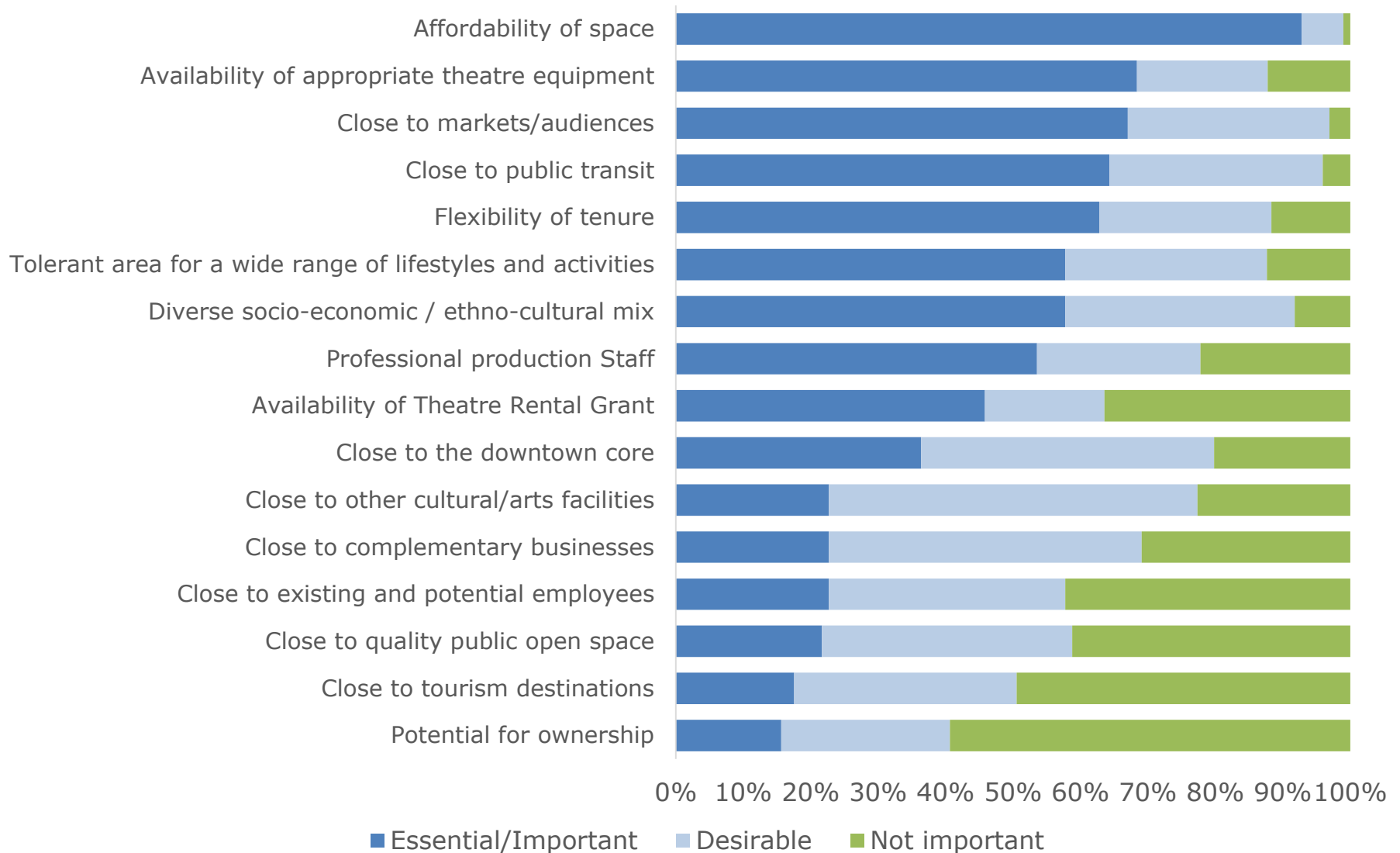
There were some organizations with budgets under \$1M willing to pay up to 10% more for Production / Rehearsal space.

Please describe how much your organization would be willing to pay for use of a facility that met your needs?



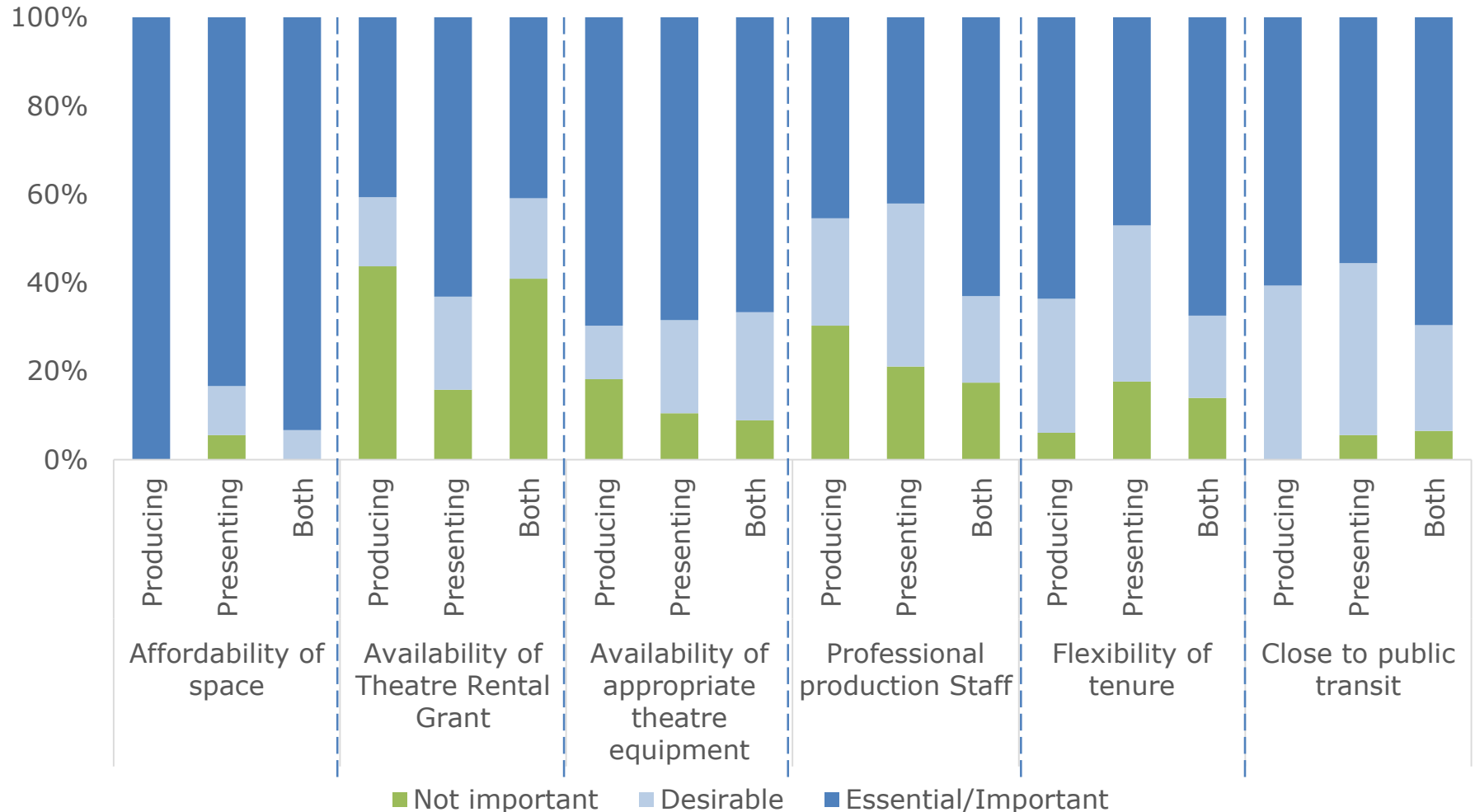
Affordability

Affordability was the most important driver in selecting space.



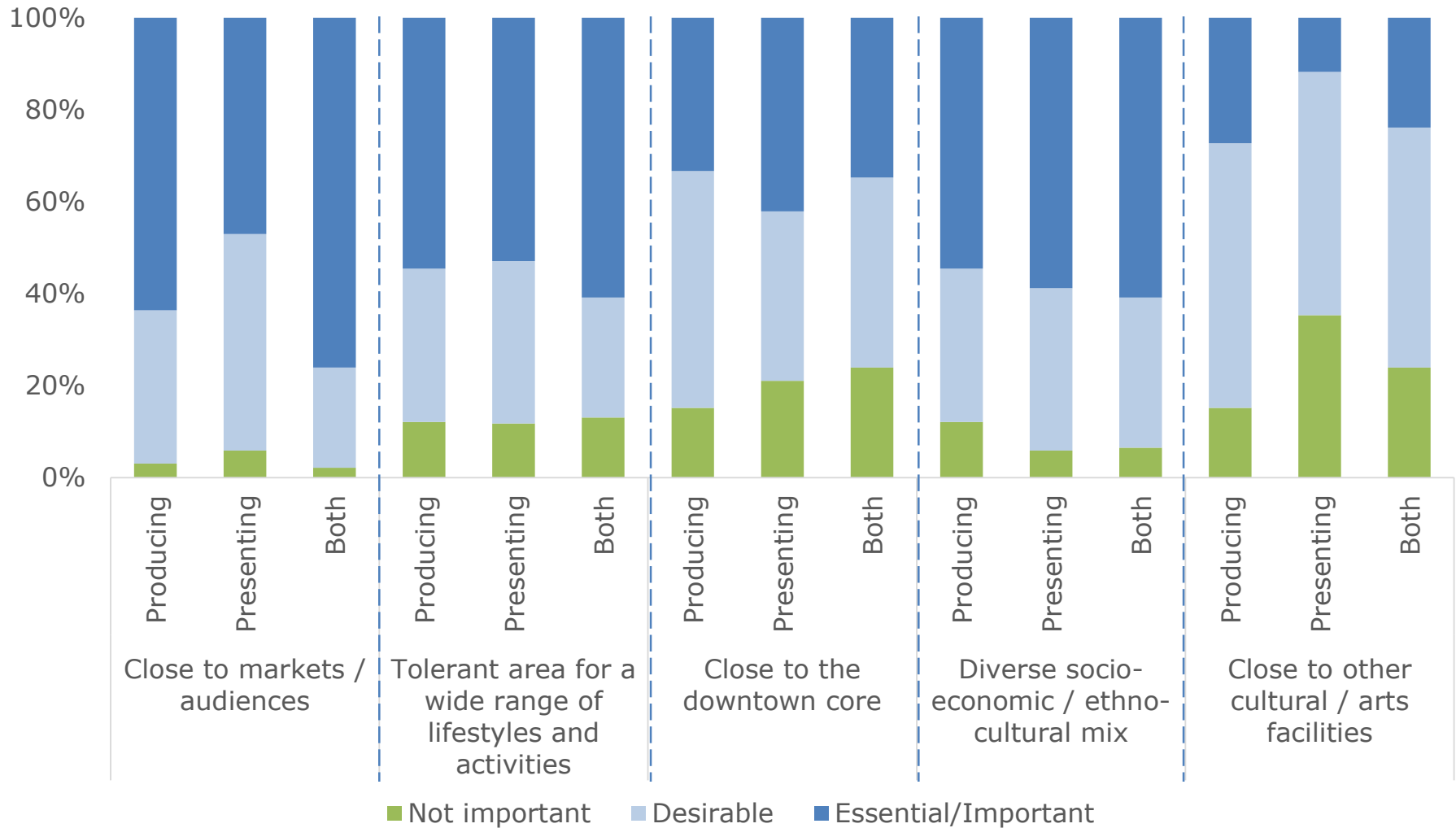
Affordability

Affordability was the most important driver in selecting space.



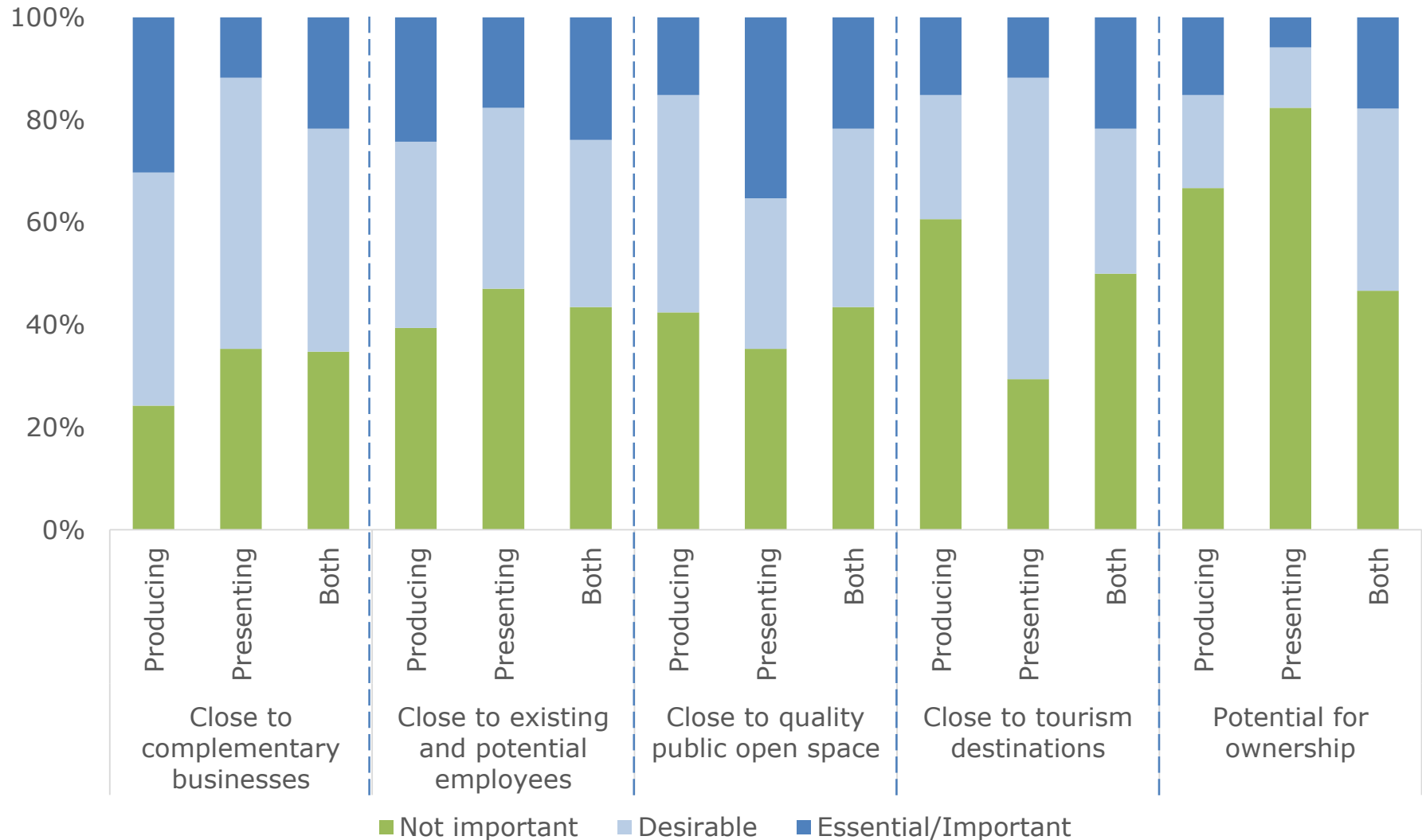
Affordability

Affordability was the most important driver in selecting space.



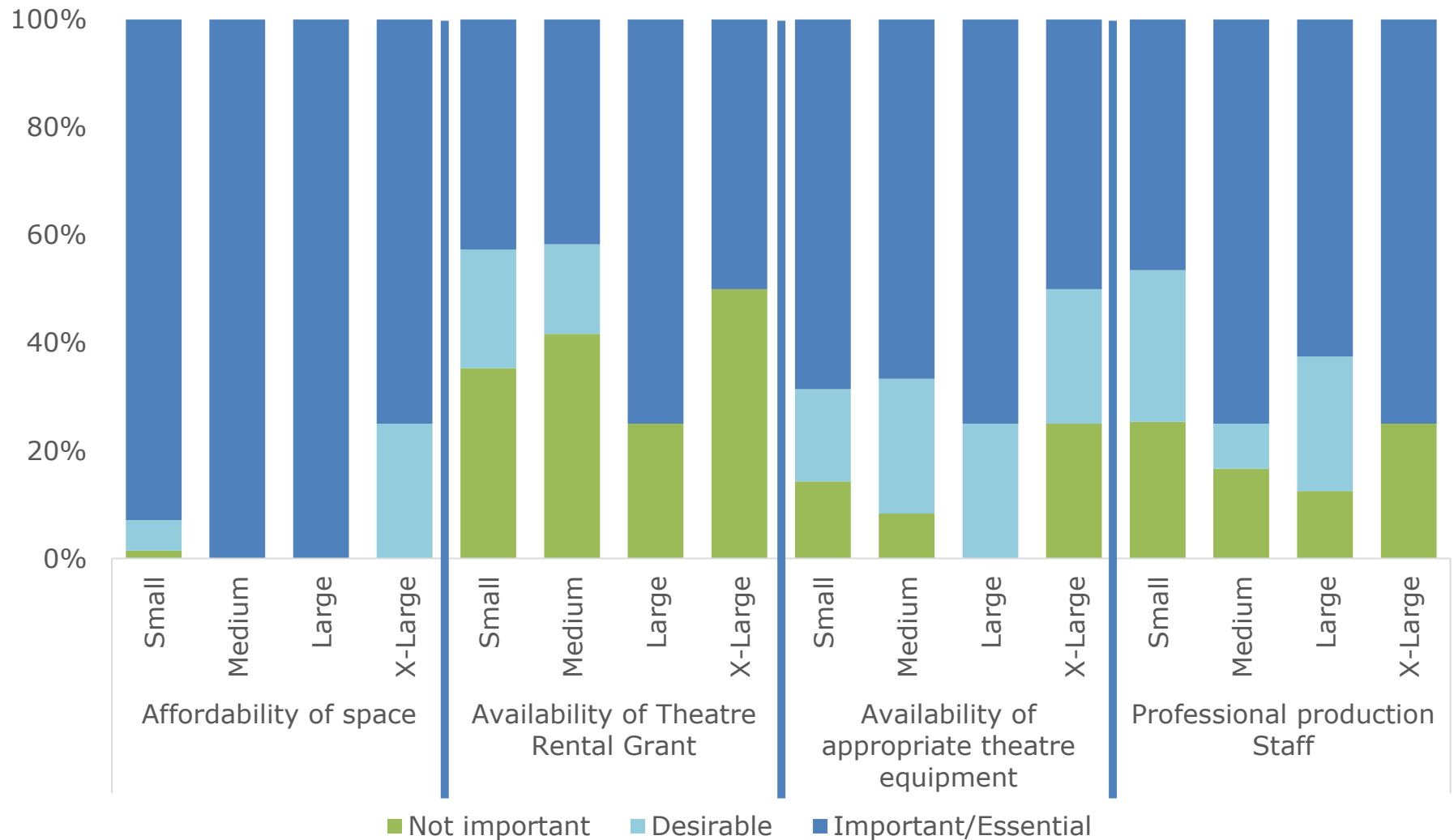
Affordability

Affordability was the most important driver in selecting space.



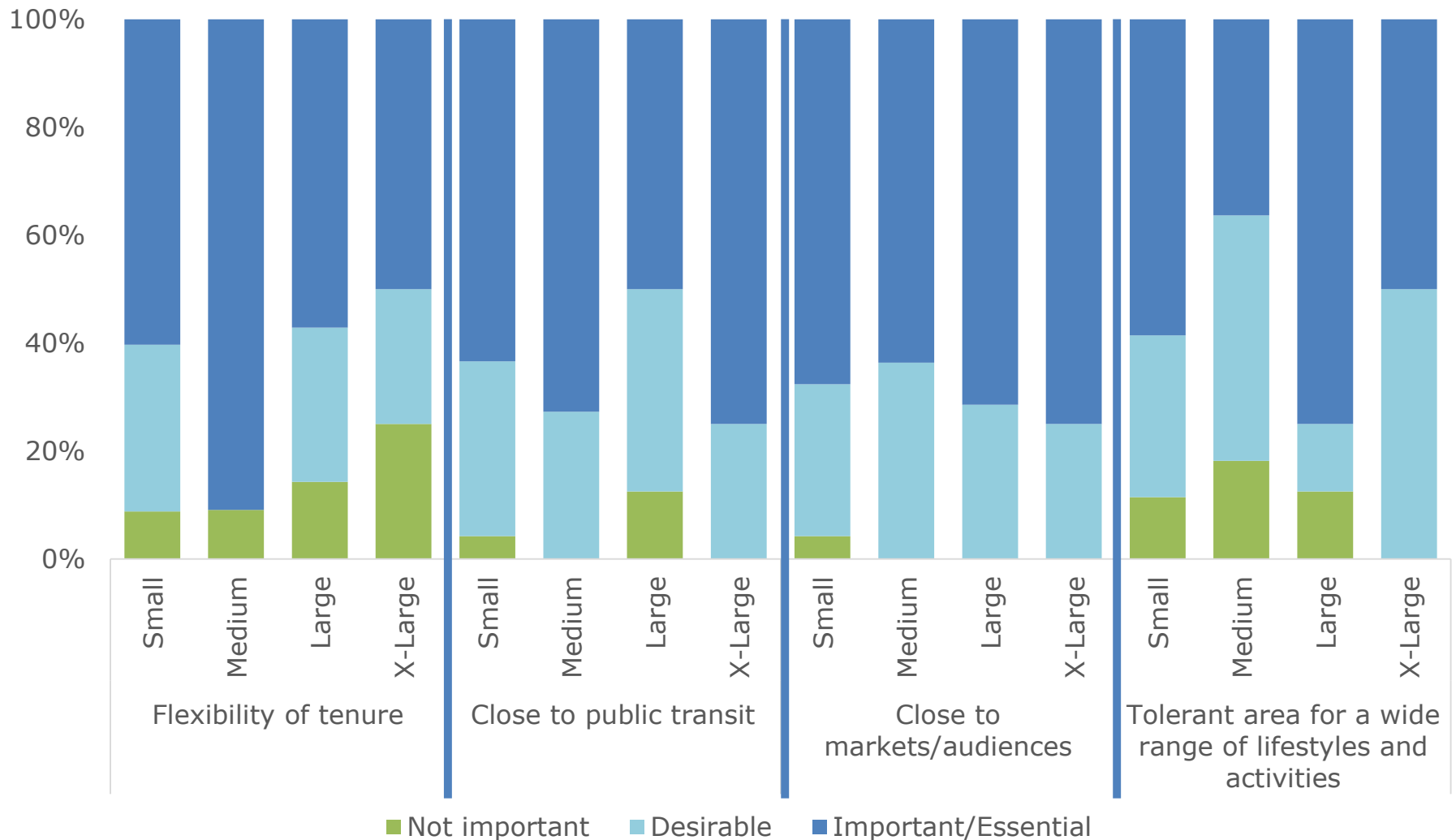
Affordability

Affordability was the most important driver in selecting space.



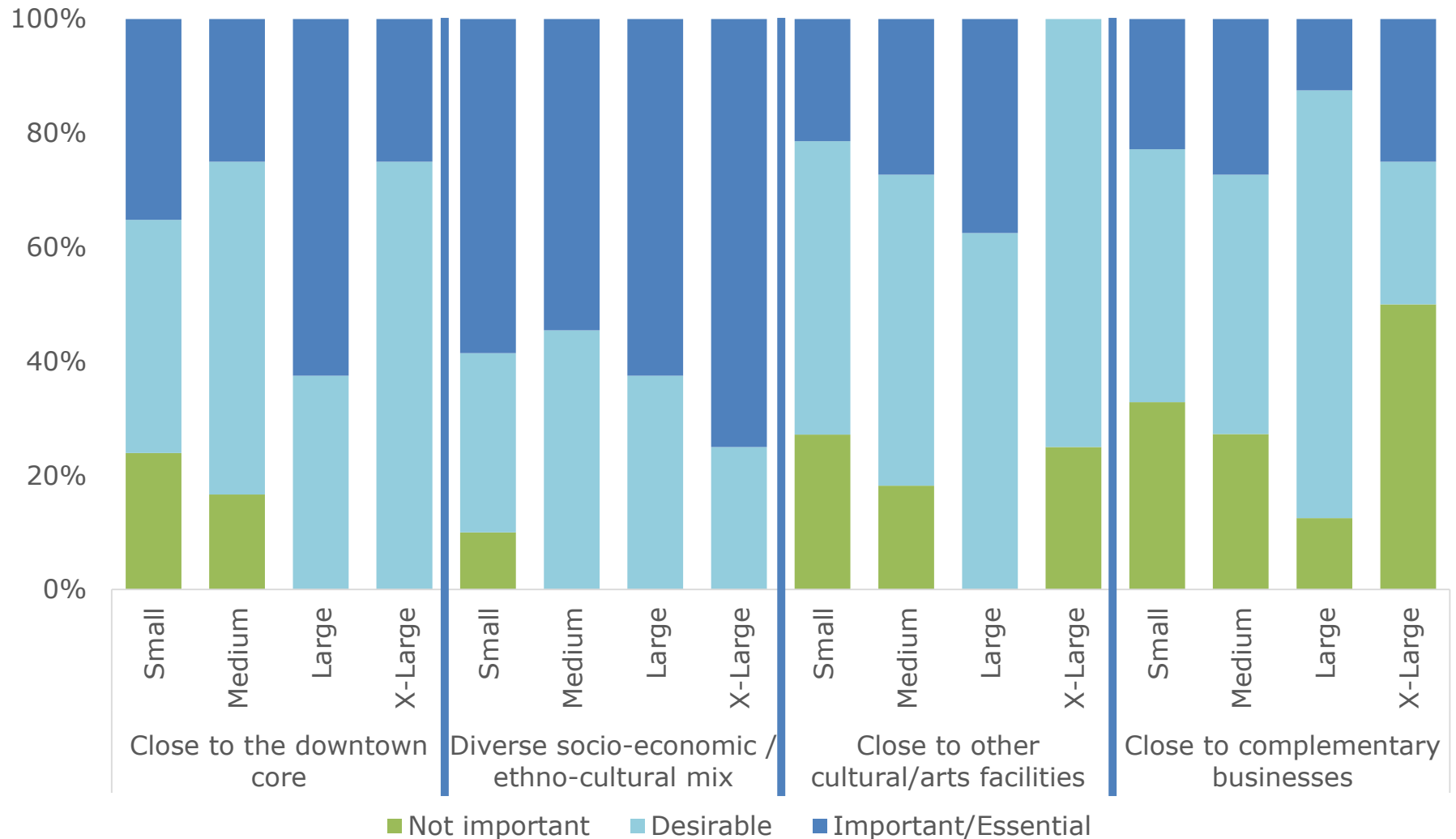
Affordability

Affordability was the most important driver in selecting space.



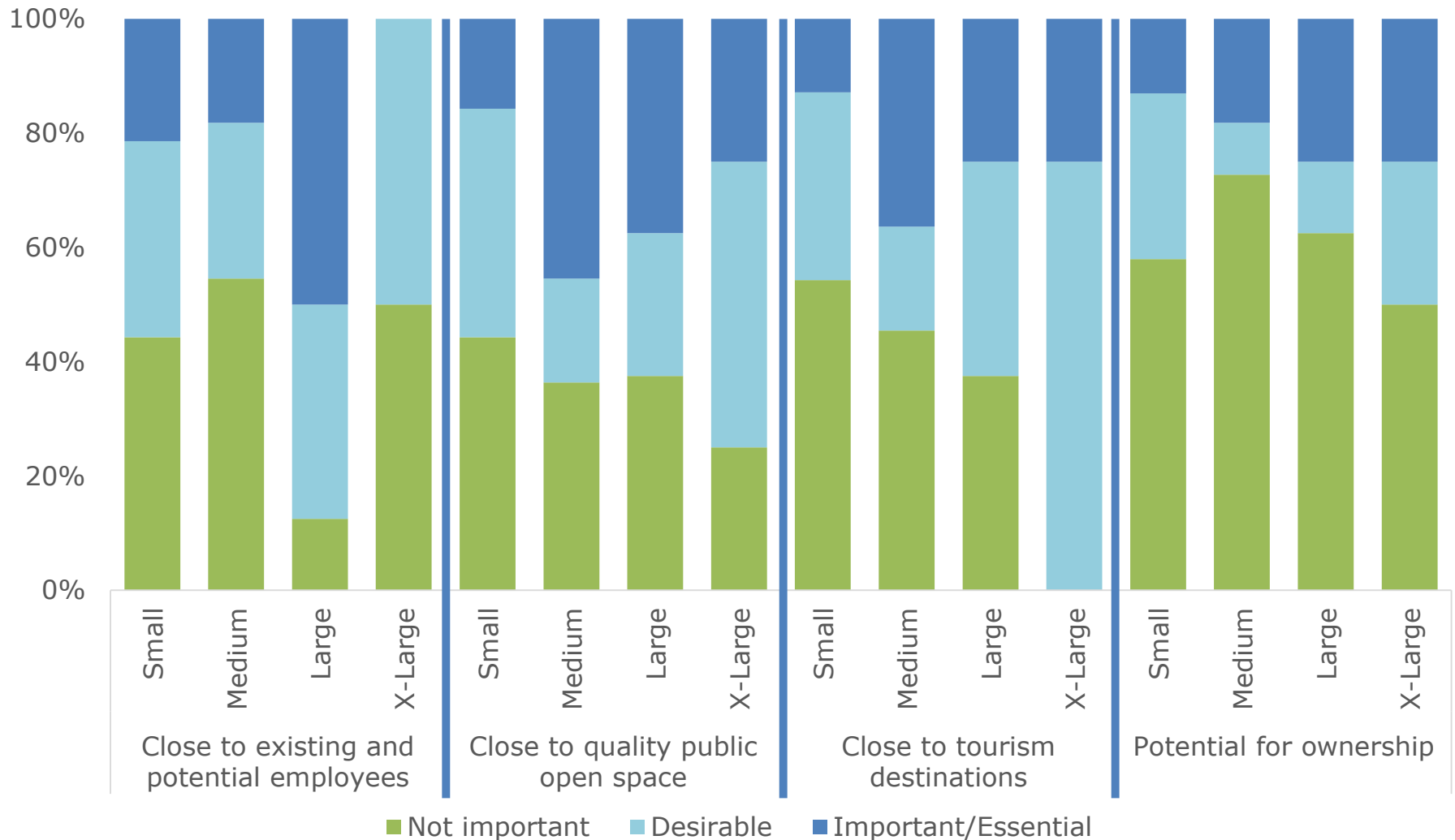
Affordability

Affordability was the most important driver in selecting space.



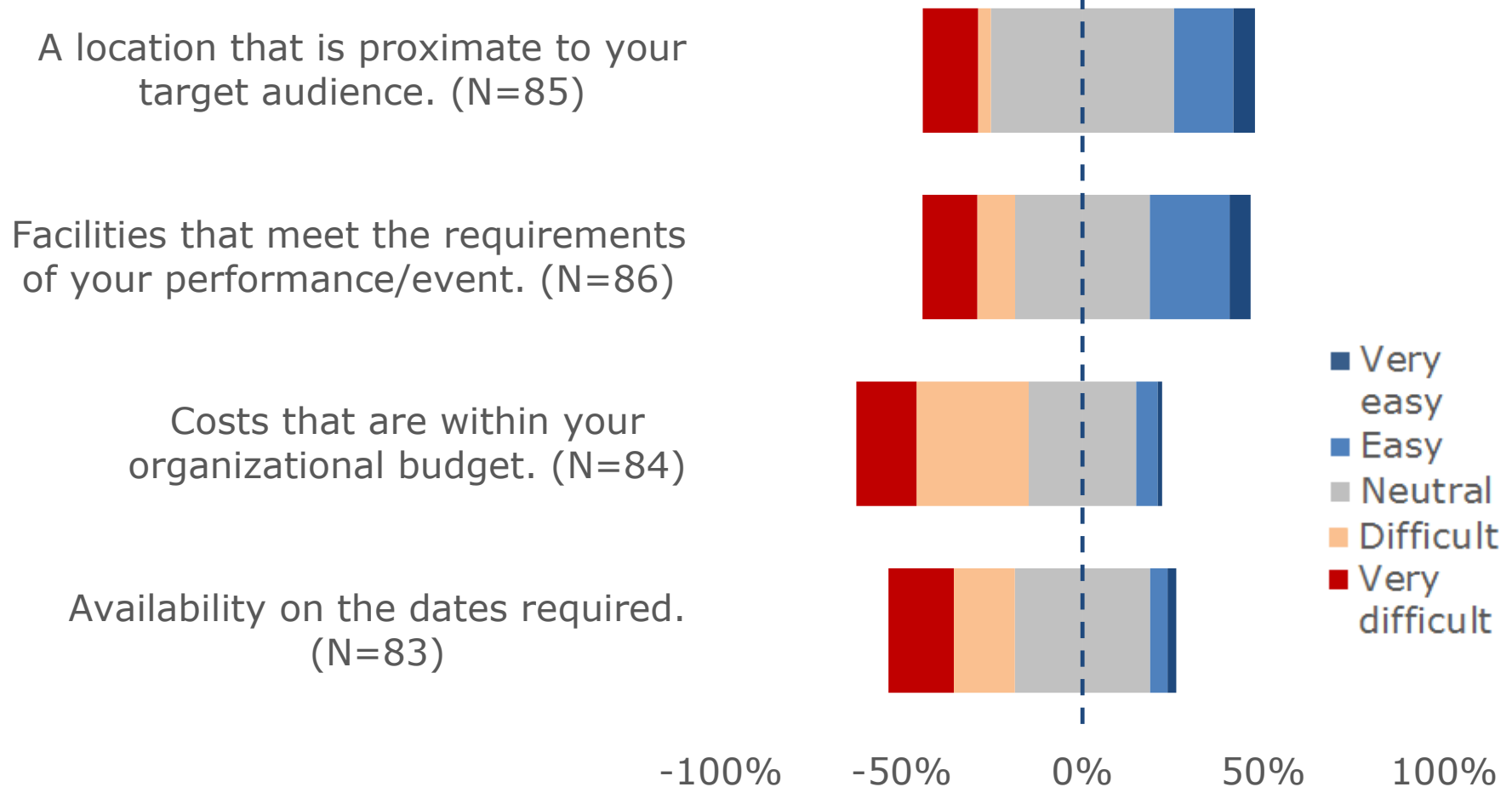
Affordability

Affordability was the most important driver in selecting space.

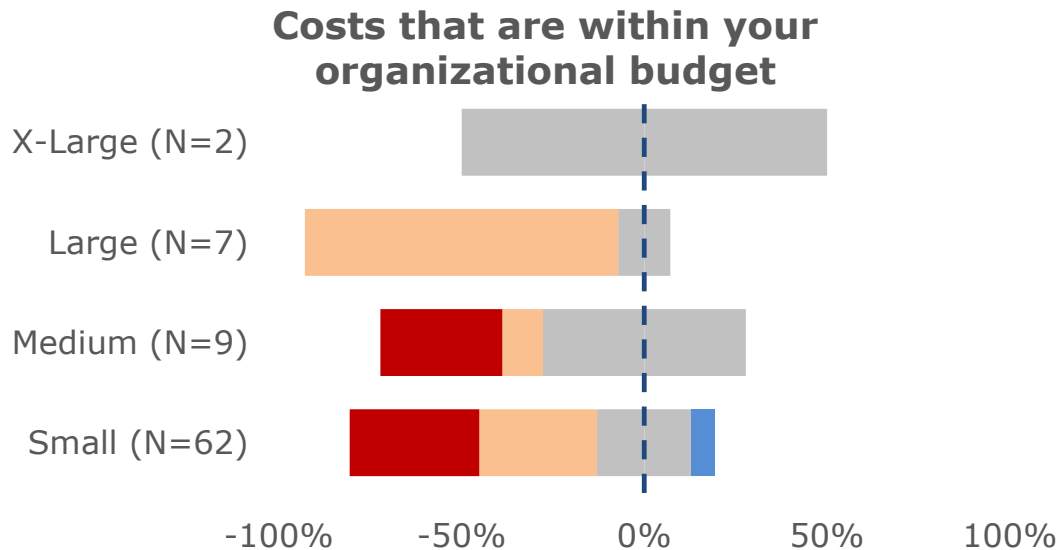
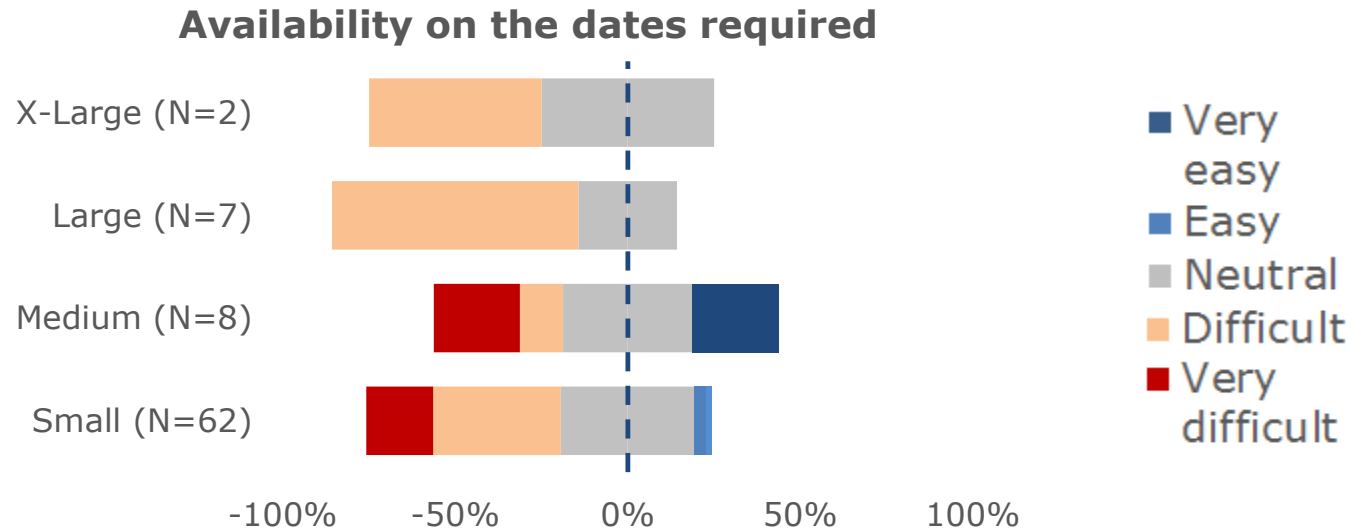


Availability & Affordability: Users find it difficult to book venues, and to find space within their budget

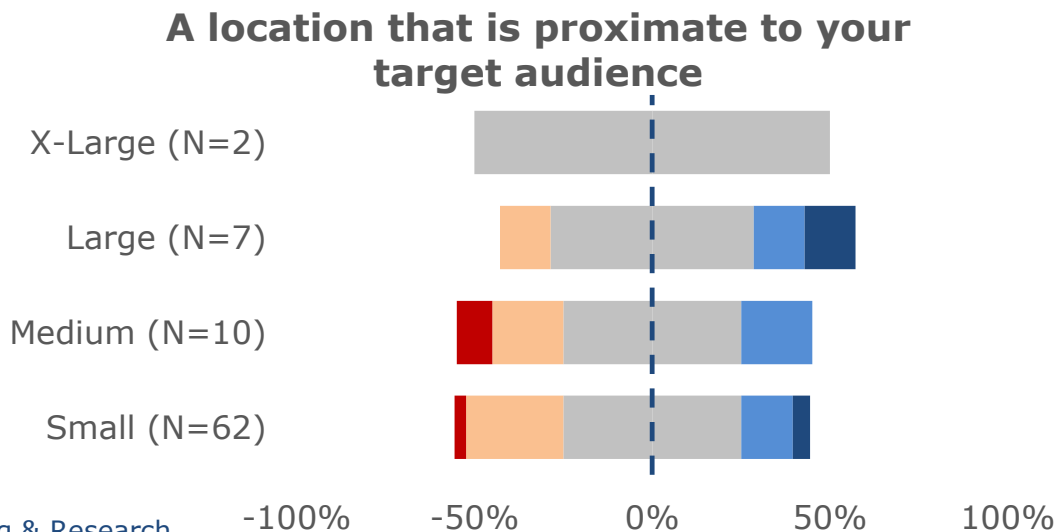
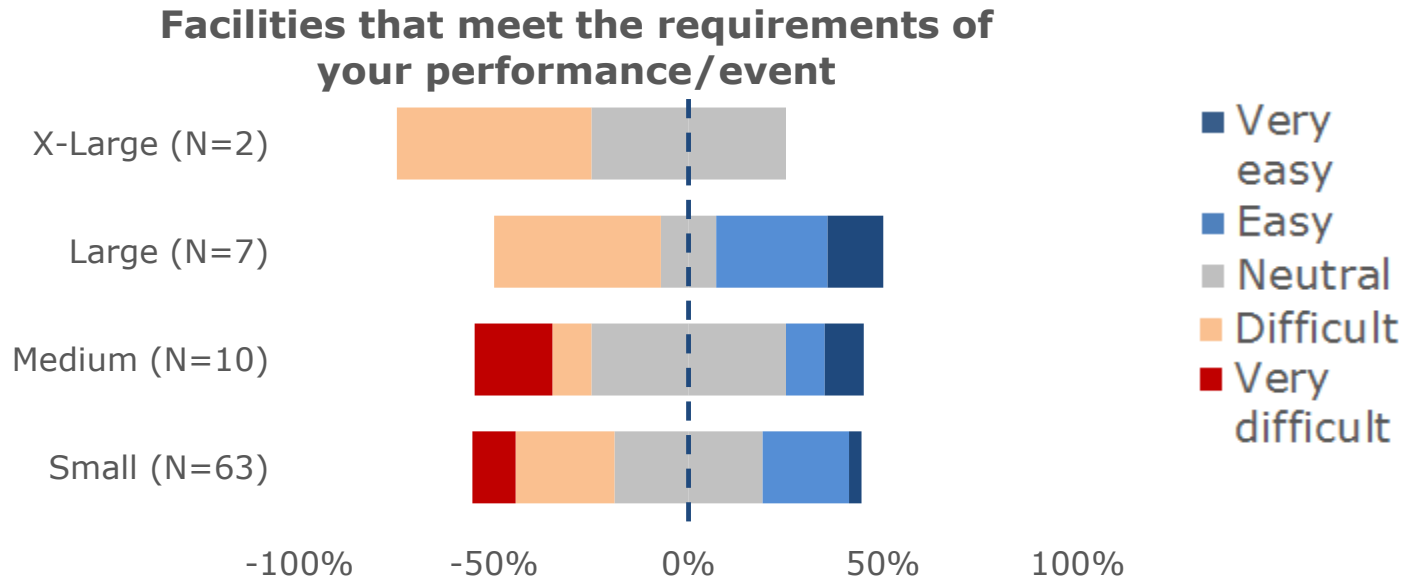
When planning a performance or event in the City of Vancouver, how easy is it to get the following:



Availability & Affordability: Users find it difficult to book venues, and to find space within their budget



Availability & Affordability: Users find it difficult to book venues, and to find space within their budget



Future Plans

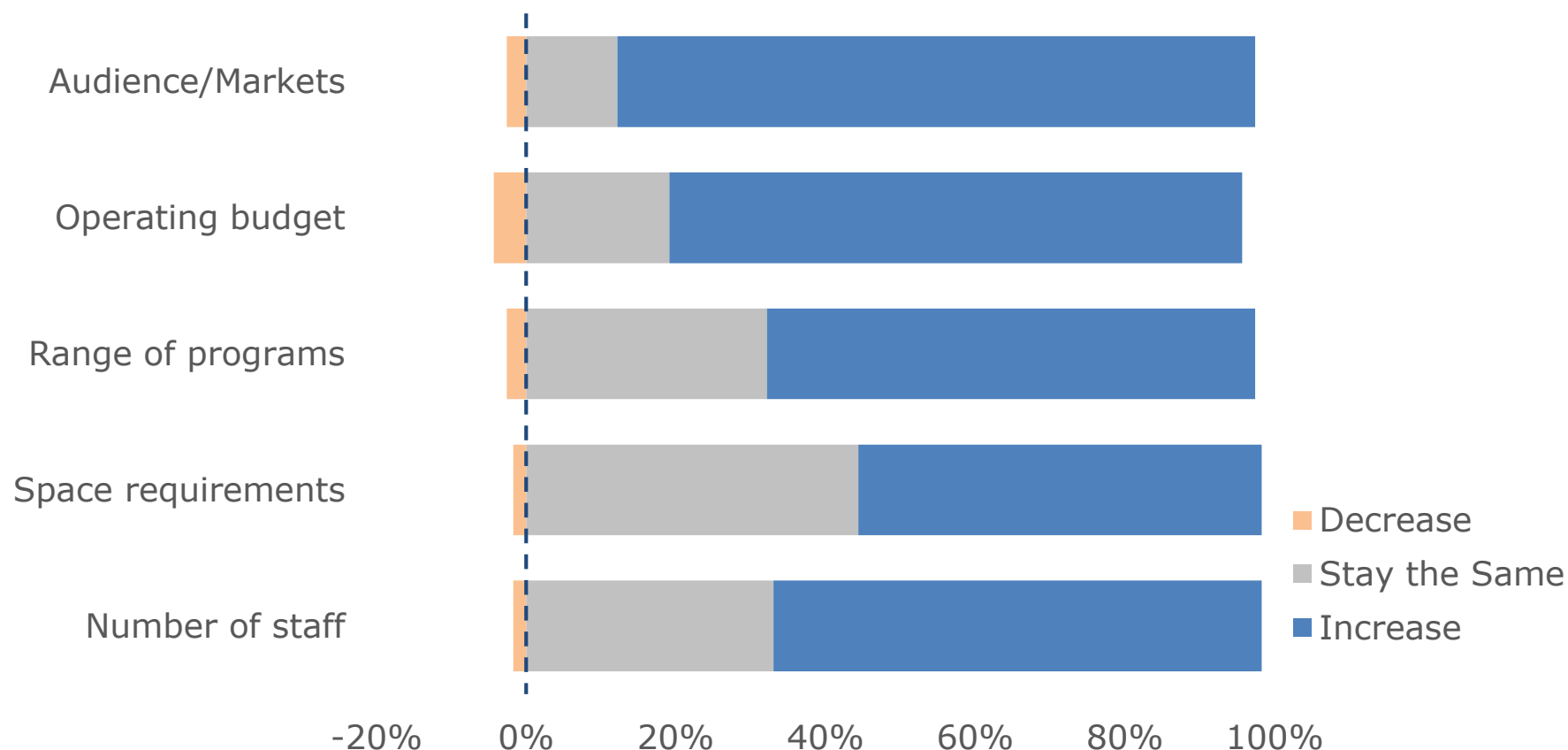
Key Findings

Future Plans

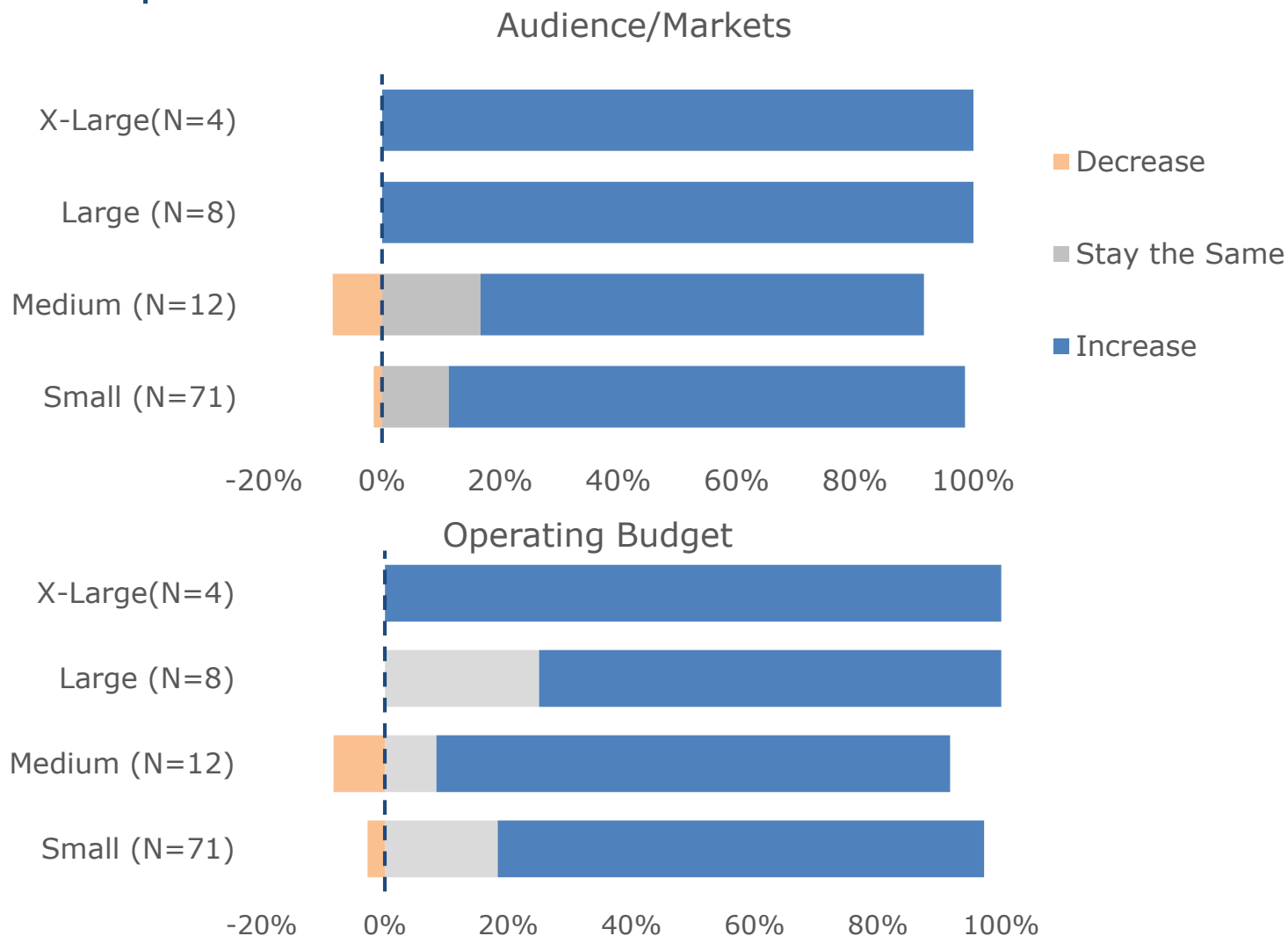
- ✱ Respondents were extremely optimistic about expanding audiences, programs, and budget size in the future.
- ✱ Many organizations had considered capital expansions or renovations.
- ✱ Partnering with city government is seen as an option for many organizations.

Looking Ahead: Respondents were **extremely optimistic** about the future of their organizations, **anticipating increases** in all aspects of their operations.

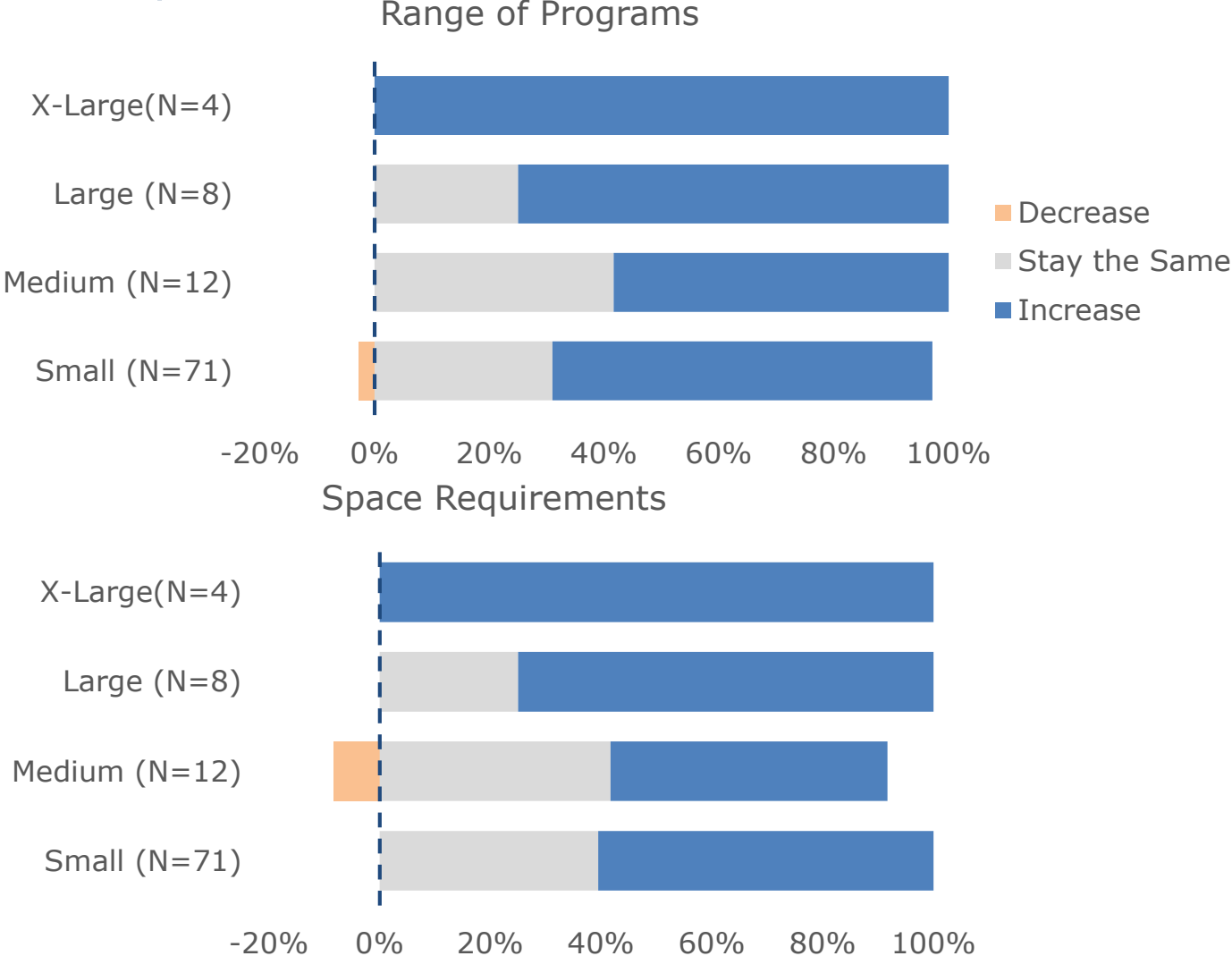
In the next five years, how do you anticipate that your organization will change in the following areas? (N=115)



Looking Ahead: Respondents were **extremely optimistic** about the future of their organizations, **anticipating increases** in all aspects of their operations.

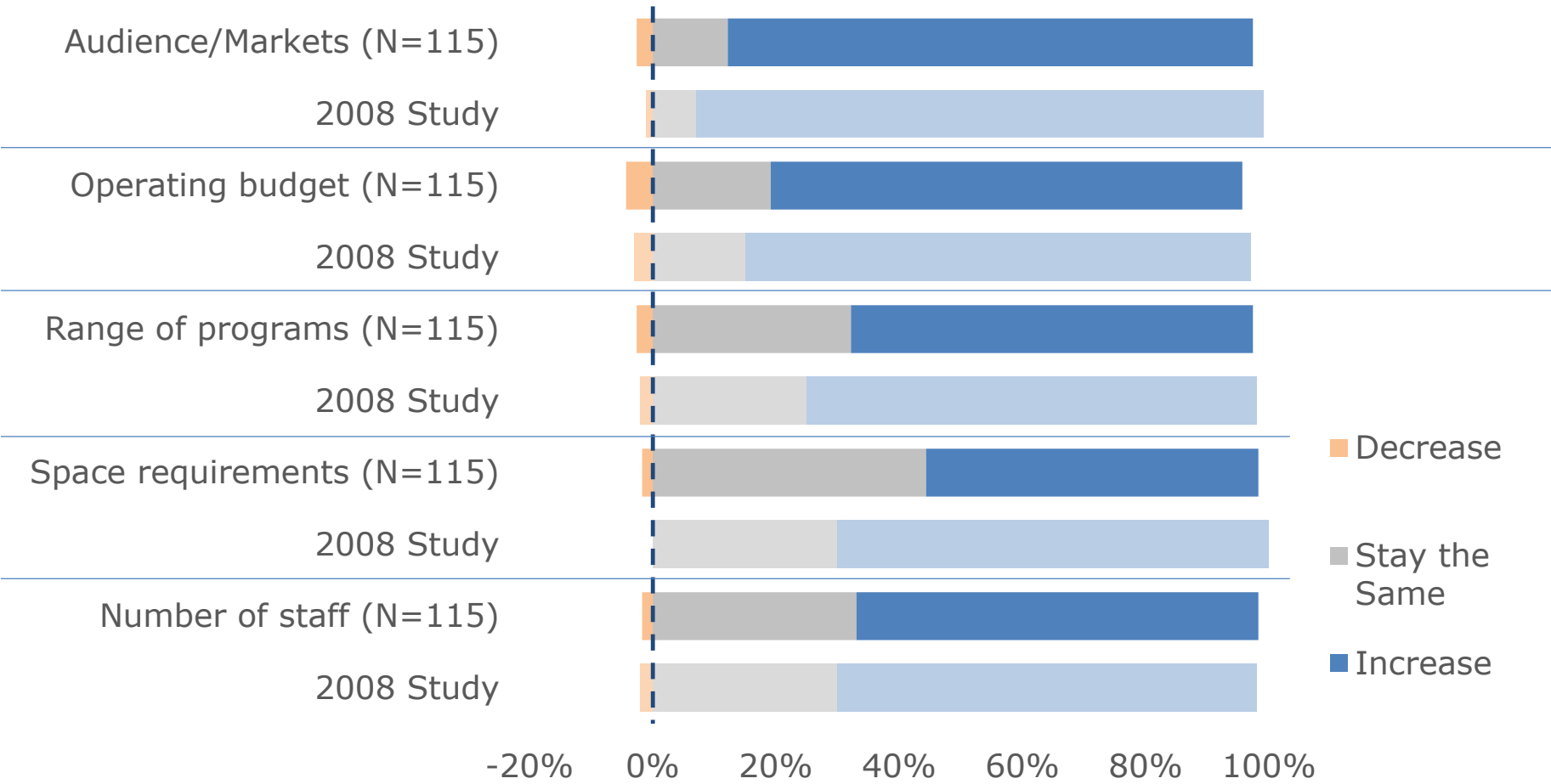


Looking Ahead: Respondents were **extremely optimistic** about the future of their organizations, **anticipating increases** in all aspects of their operations.



Looking Ahead: Compared to 2008, we observe that the outlook is **marginally less optimistic**, but still remarkably positive.

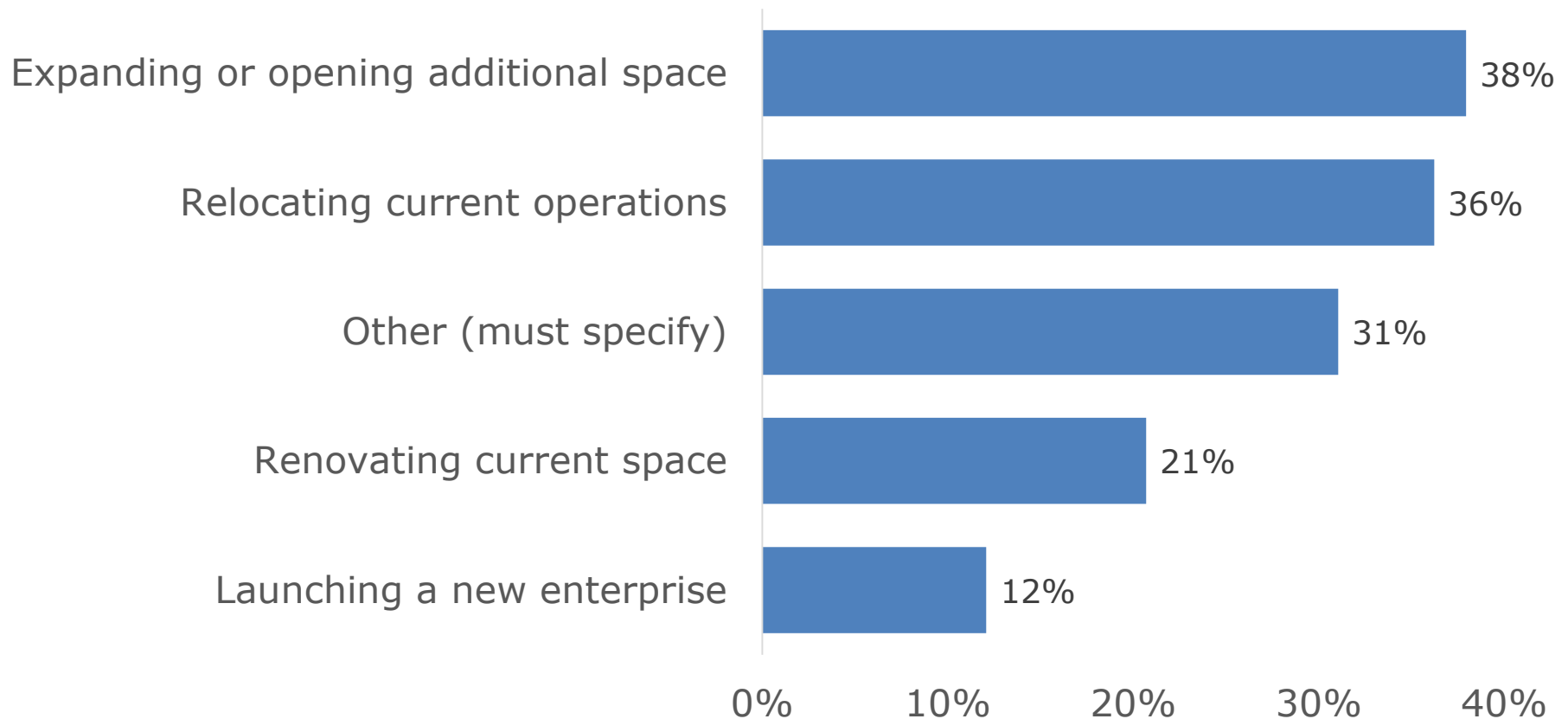
In the next five years, how do you anticipate that your organization will change in the following areas?



Project Plans

Expanding space is in the future plans of many organizations.

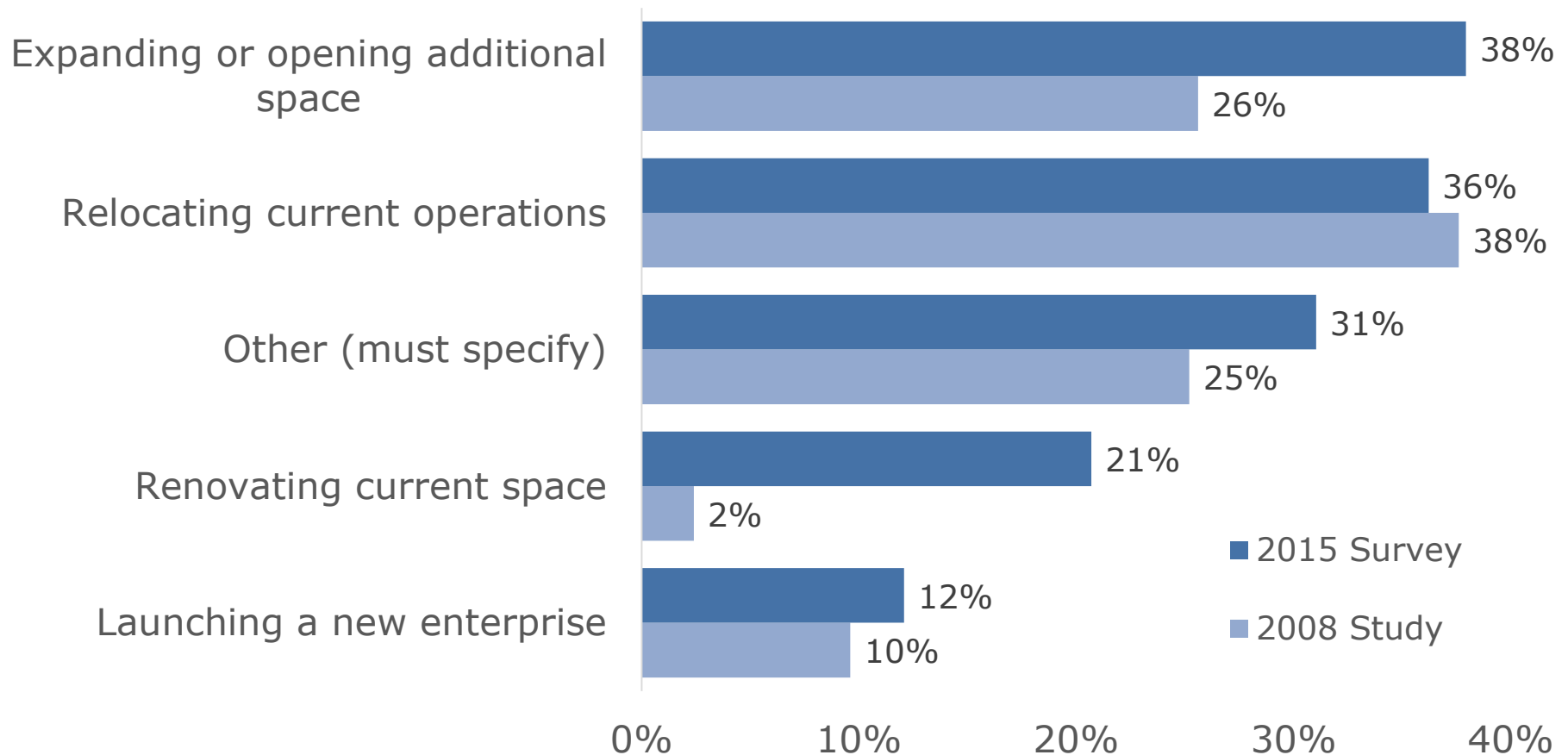
How is your organization planning to address the issue of expanding or opening additional space? (N=38)



Project Plans

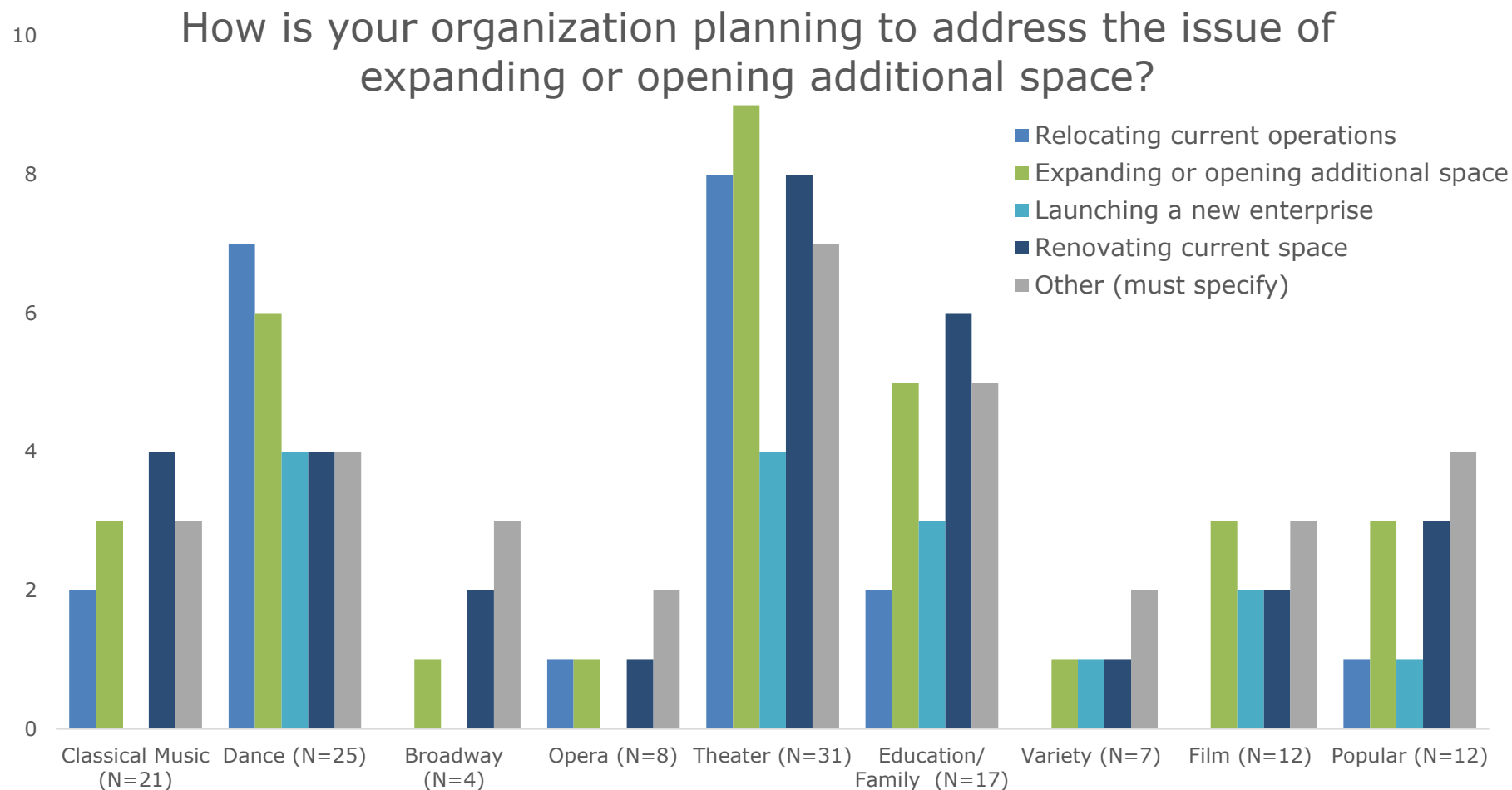
Relative to 2008, more organizations are considering expansions and renovations.

How is your organization planning to address the issue of expanding or opening additional space?



Project Plans

Organizations across genres plan to address space needs in a variety of ways.



'Other' Responses – Project Plans

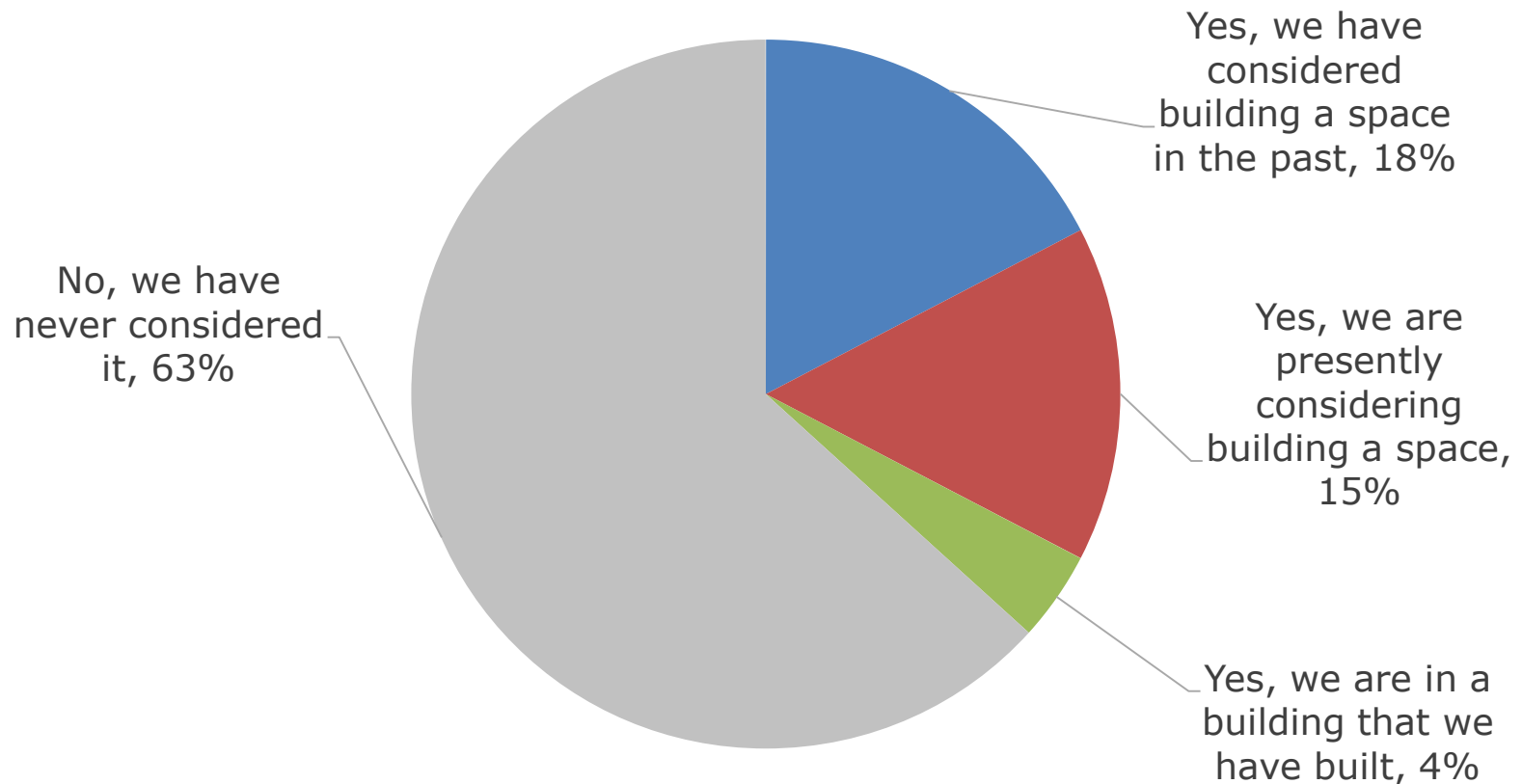
Other Response themes included

- * Developing partnerships with other organizations for space needs
- * Exploring off-site or satellite locations
- * Adaptive reuse of existing spaces and buildings
- * Renting larger spaces
- * And several organizations supporting the development of a mid-sized music venue

Project Plans:

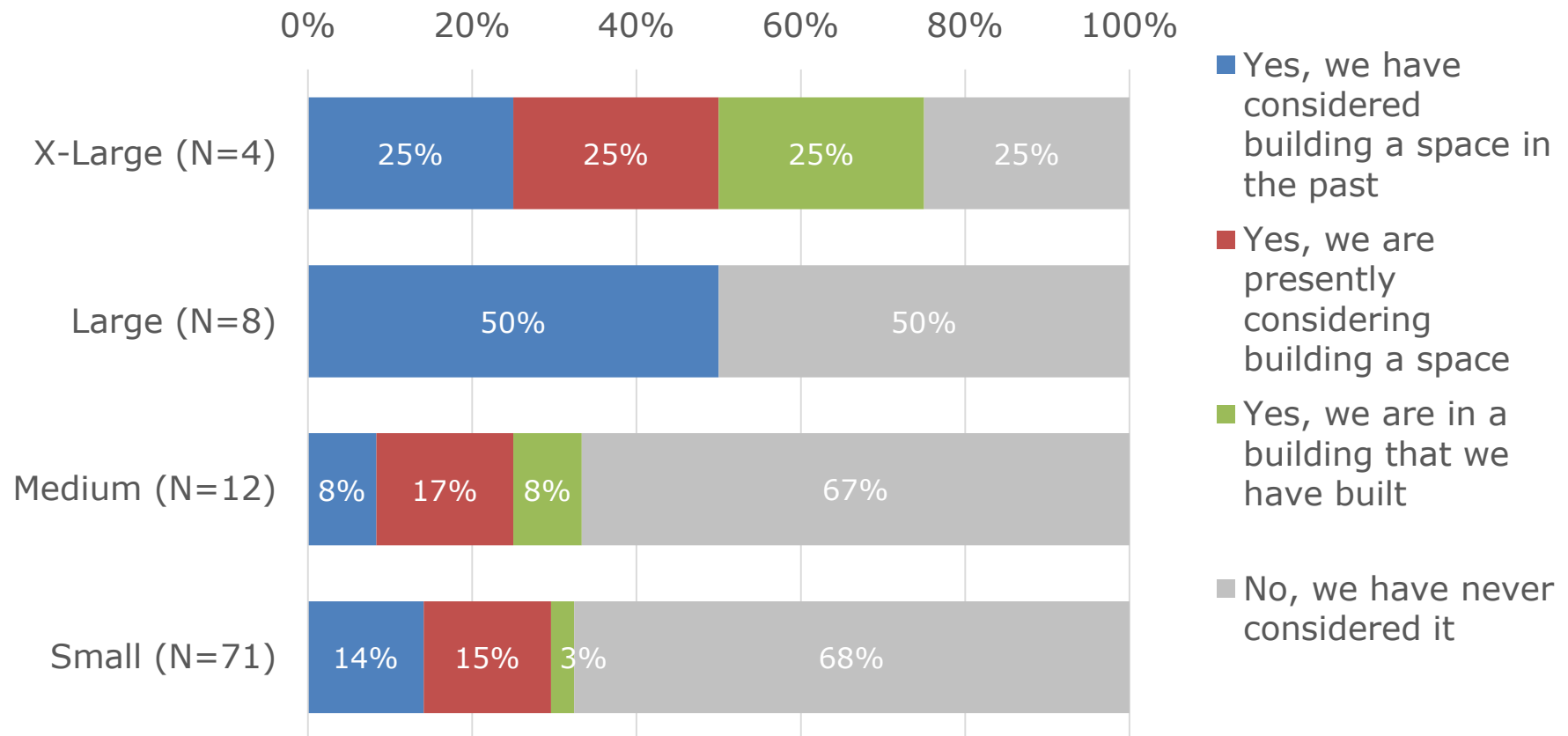
More than a third of respondents have considered but not yet built space for their own use.

Has your organization considered building new space for your own use (i.e. a capital works project)? (N=98)



More than a third of respondents have considered but not yet built space for their own use; larger organizations were more likely to have considered capital plans.

Has your organization considered building new space for your own use (i.e. a capital works project)?

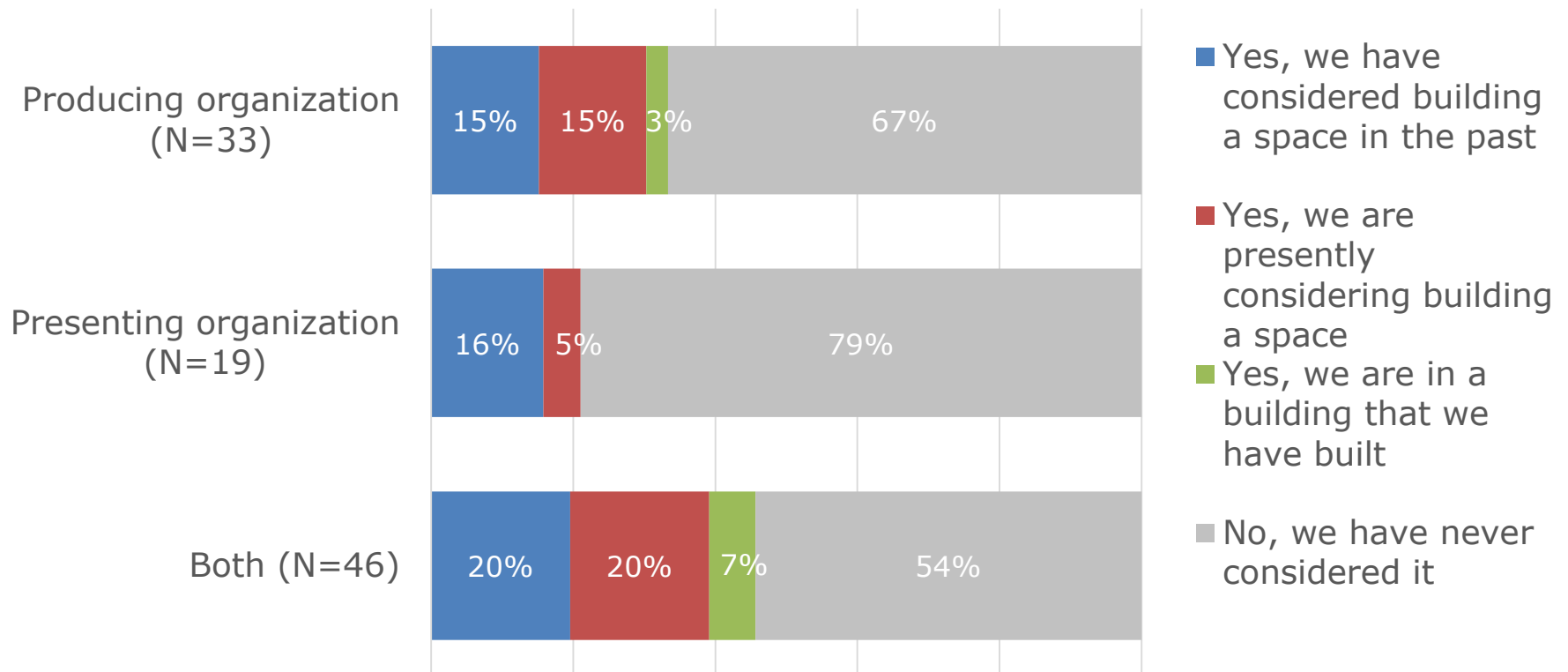


Project Plans by Organization Type:

Producing organizations were **more likely to have considered capital projects** than presenting organizations.

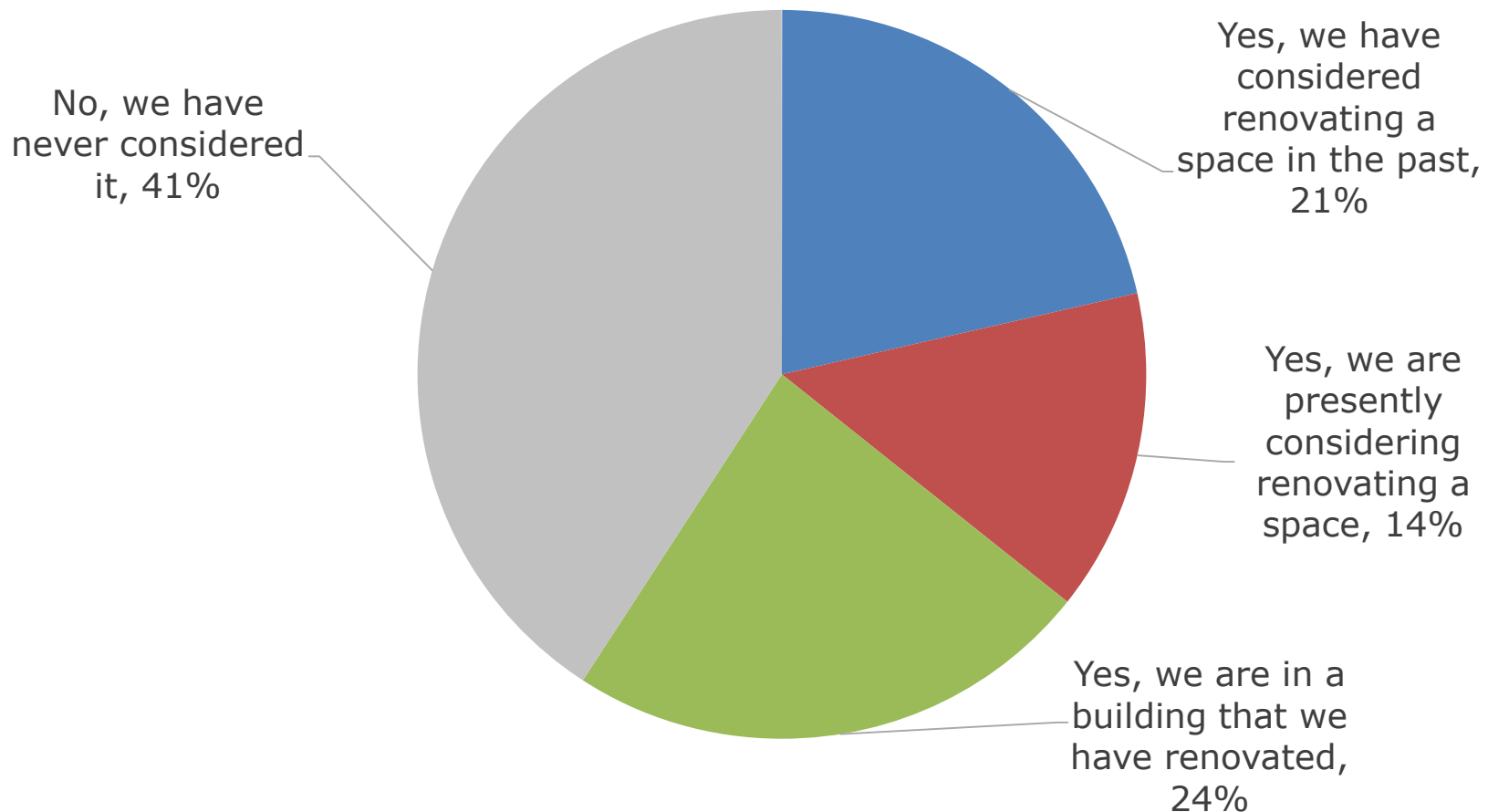
Has your organization considered building new space for your own use (i.e. a capital works project)?

0% 20% 40% 60% 80% 100%

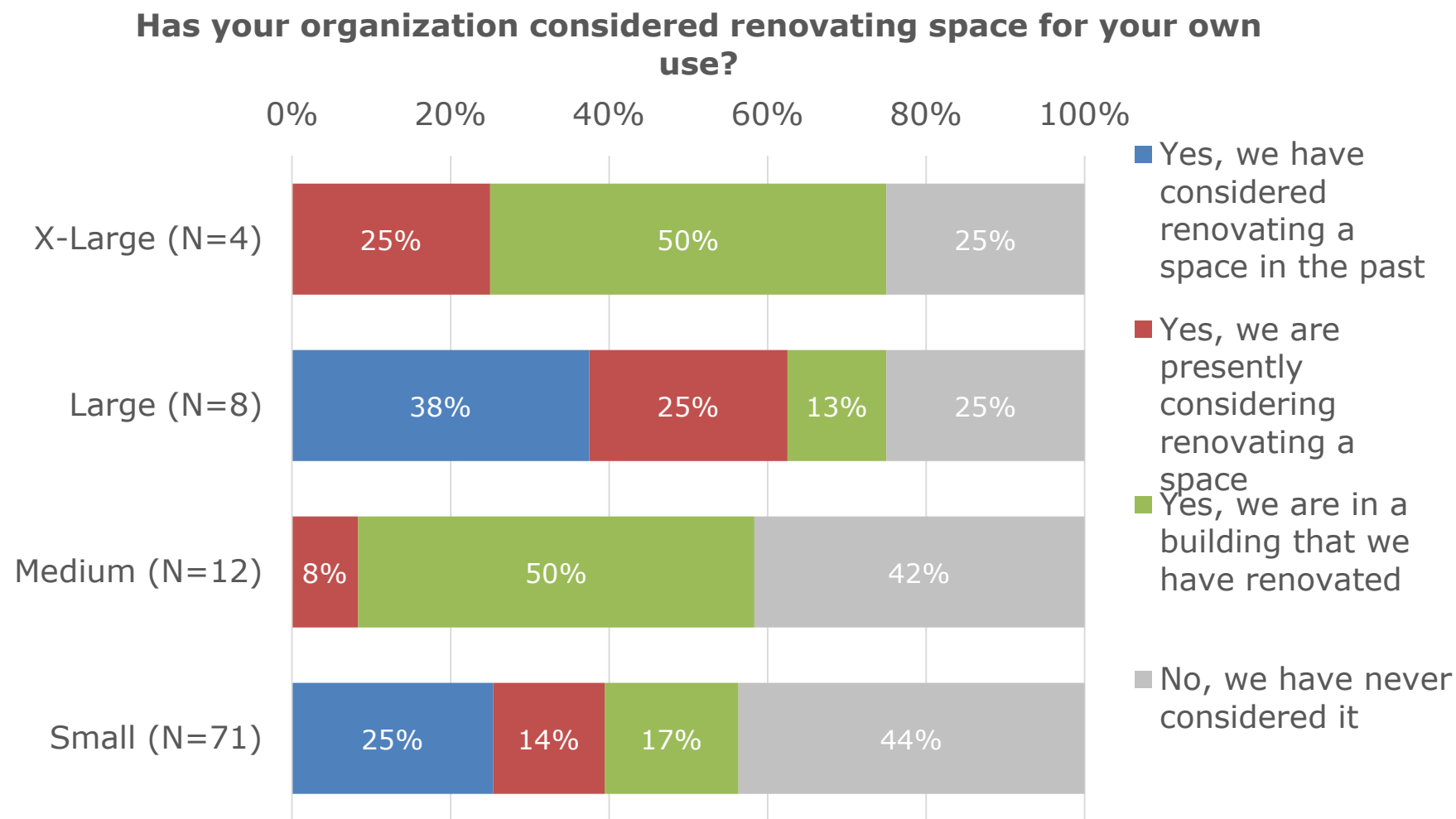


60% of respondents have considered or executed renovations of space; Fewer than 15% of respondents are still considering renovations.

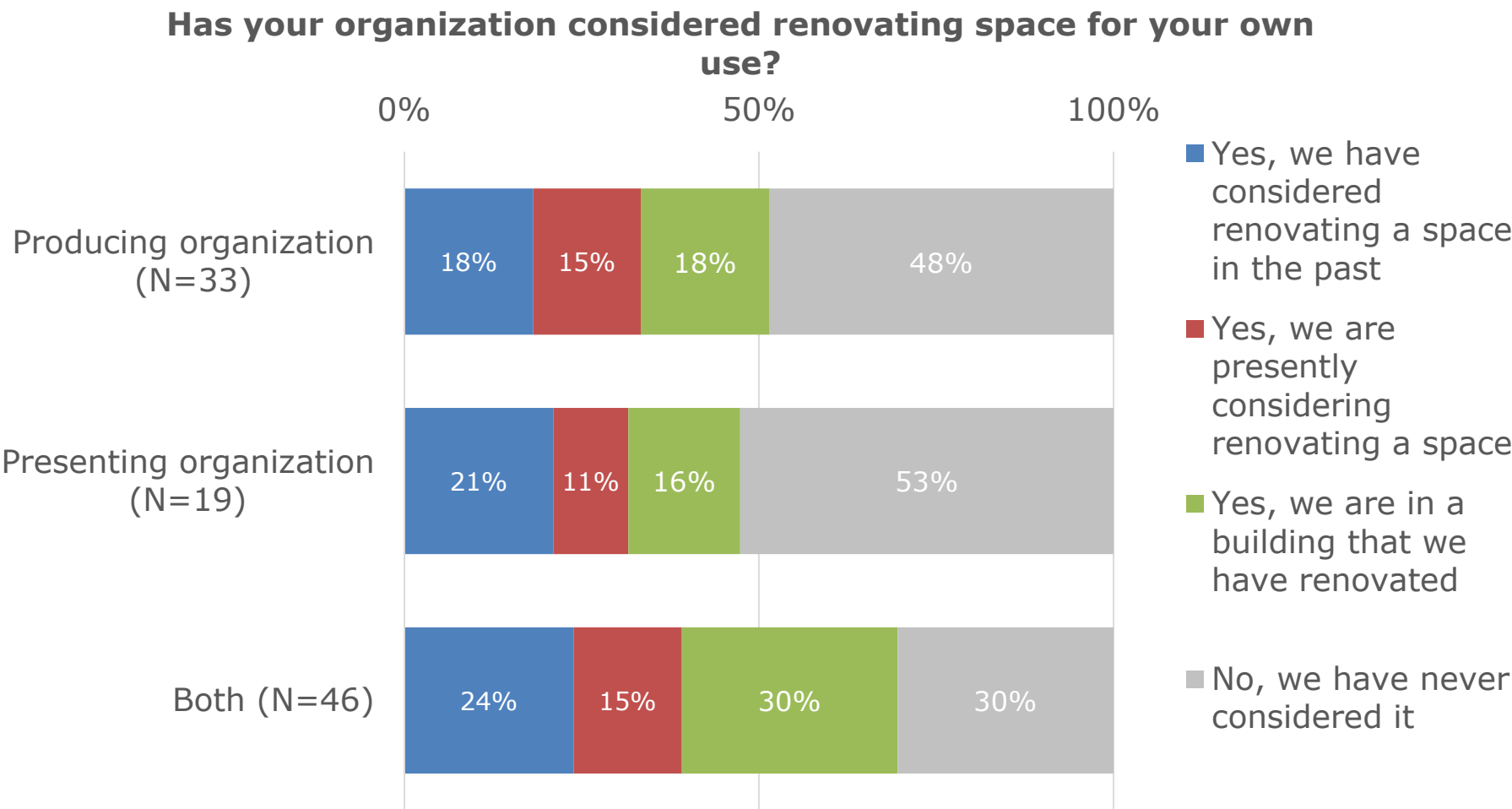
Has your organization considered renovating space for your own use? (N=98)



60% of respondents have considered or executed renovations of space; Fewer than 15% of respondents are still considering renovations.



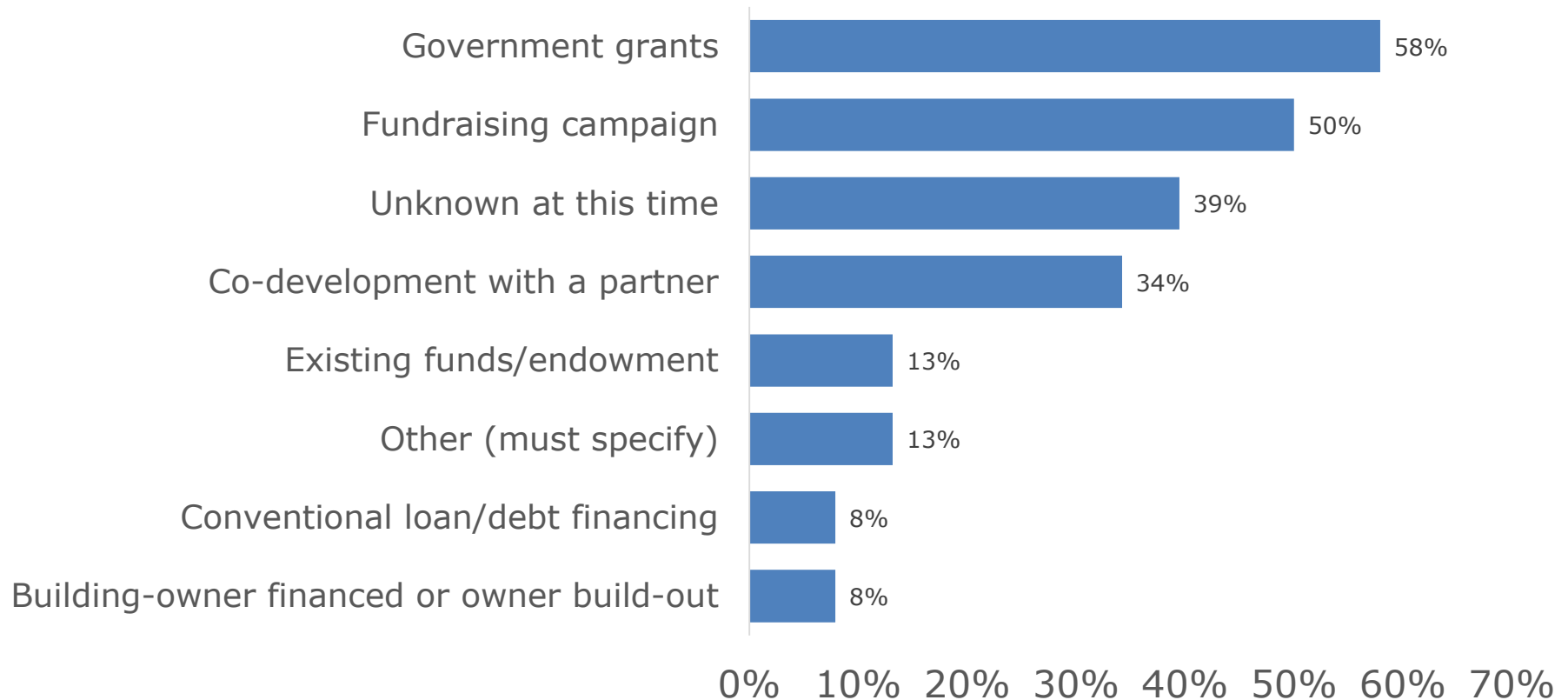
60% of respondents have considered or executed renovations of space; Fewer than 15% of respondents are still considering renovations.



Funding new space

Of the organizations that are considering expansion or relocation, **most intend to seek government grants**, and half plan to undertake fundraising. **39% are not sure** how they will fund their project.

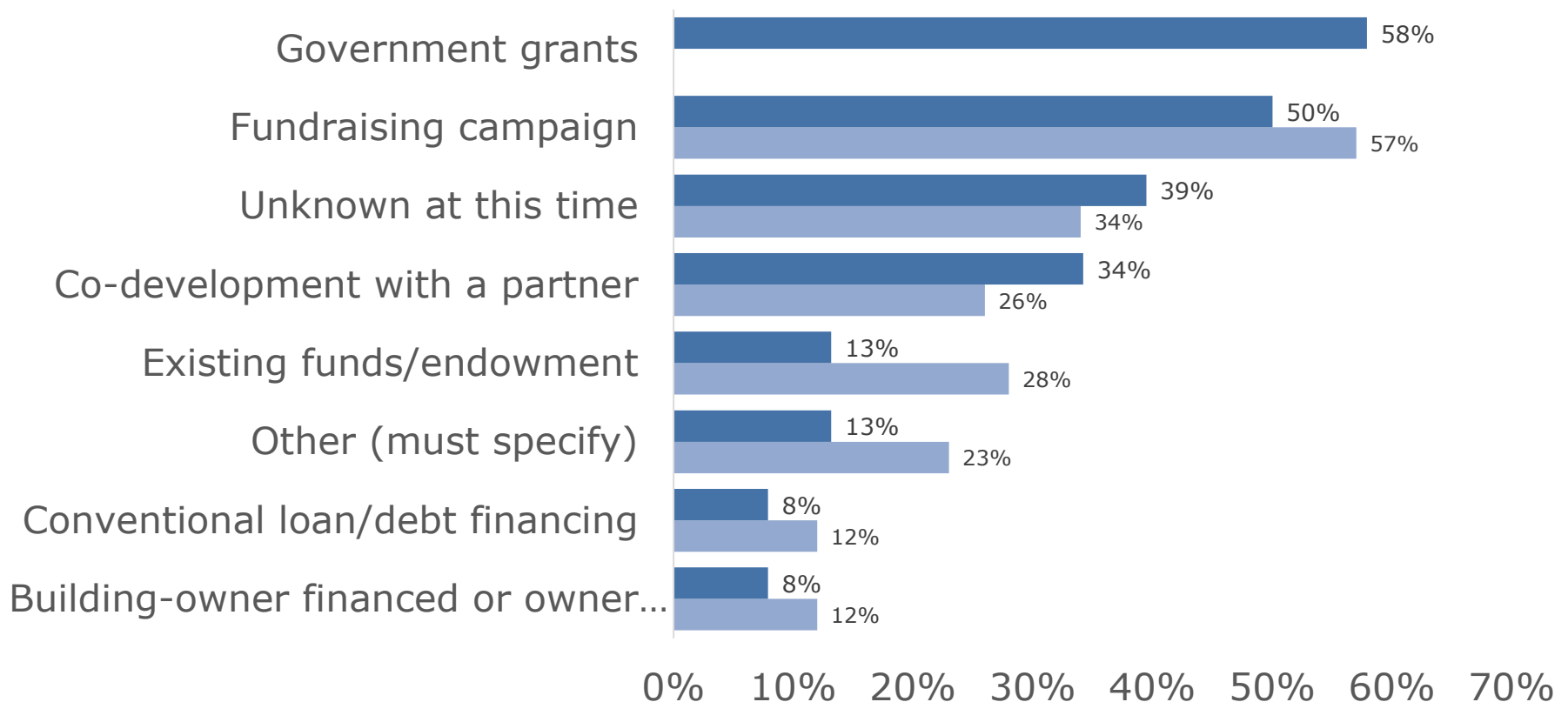
How does your organization intend to fund its expansion/relocation? (N=38)



Funding new space

Compared to the 2008 study (which did not include government grants as an option), fewer organizations plan to fundraise or to use existing funding. More are seeking partnerships as a means of achieving their goals.

How does your organization intend to fund its expansion/relocation? (N=38)



Thank you!



for the Arts and
Entertainment
Industries

Appendix 7: Evaluation and Indicators

Appendix 7: Evaluation and Indicators

Bearing in mind the nuances of public grant-making, AMS has recommended a series of potential indicators that correspond to one or more of the criteria above. Many of the indicators are sourced from datasets that already exist, as public collections or in conventional business record-keeping. Importantly, not all indicators are considered strictly necessary to a successful grant proposal; the list below is a set of suggestions that may, in various combinations, form a clear and compelling picture for the City of Vancouver's key decision-makers. In the interest of clarity, indicators are sorted in keeping with the given criteria described above, and are prefaced with suggested component goals that reflect each criterion. Inclusion of key stakeholders is a cornerstone of the criteria and indicators below, consistent with project goals.

1. ALIGNED

Provides a clear public benefit to citizens of Vancouver, through effort(s) that advance and complement both civic and arts and cultural community goals and priorities. Manifests opportunities to meet a demonstrated community need.

Grantees will clearly articulate how their proposed effort drives at some or all of the following:

- Vision and plan for the infrastructure project
- Provides a clear public benefit
- Demonstrated ability to meet a current (and/or future) need in the arts and cultural community (e.g. priority identified in cultural infrastructure plan or other study)
- Positively contributes to Vancouver's broader arts and cultural community

- Demonstrates alignment with Creative City Strategy
- Aligns with other City of Vancouver priorities and goals
- Is vital to and advances activities and programming of all partners
- Meaningfully enriches and complements existing arts and cultural programmes and services
- Fits within the overall facility ecology of Vancouver; complementing existing facility and programmatic resources

This portion of the proposal may be supported by the following data indicators, as appropriate and available.

Data Indicators

- Needs assessment
- Demand studies
- Needs identified in Cultural Infrastructure Plan
- Organizational mission, vision, goals, programming history and future plans (strategic plans)
- City-wide space data
- City-wide programming data
- Artist data from Statistics Canada
- Alignment with Creative City Strategy
- Alignment with City of Vancouver priorities/goals, i.e. : Key strategies: Greenest City Strategy, Healthy City Strategy, Economic Action Strategy, City of Reconciliation, Area and community plans and strategies

2. VITAL

Enhances opportunities for the arts and cultural community and affected neighborhoods/districts to thrive and adapt to changing circumstances. Articulates how the project will create durable public value in terms of both tangible and intangible assets.

Grantees will clearly articulate how their proposed effort drives at some or all of the following:

- Contributes to Vancouver as a culturally vibrant city
- Provides secure, affordable, adaptable, long term benefit
- Flexibility and capacity to adapt to changing use and/or future audience/cultural/programming needs and practice
- Stewardship of organizational resources intentionally prioritizes institutional vitality (e.g. succession planning in place)
- Expands community and programme capacity (e.g. participant outcomes, attendance, programming, revenues, space security & control, capital equity)
- Supports ability to thrive beyond basic functional needs (e.g. ancillary uses to support revenues)
- Demonstrates increased access and participation to arts and culture

This portion of the proposal may be supported by the following data indicators, as appropriate and available.

Data Indicators

- Research studies
- Participant and stakeholder (including audience, artist and volunteer) data
- Data from Statistics Canada and City of Vancouver, etc.
- Functional concept plan and space use proposal(s), including ancillary use for revenue generation
- Programming inventory data
- Staff and artist compensation data
- Organizational financial health: financial statements and budget projections (including demonstration of reserve funds, revenues, etc.)

- Organizational capacity (via development personnel, board size, staff and volunteer capacity); Programming, and organizational evaluation policies
- Demonstration of succession plan
- Demonstration of planned or potential facility adaptability

3. EQUITABLE AND DIVERSE

Expands opportunities to experience art and supports cultural practices reflective of Vancouver's diverse communities. Special consideration given to projects intended to nurture cultural understanding and mutual respect in respect to reconciliation, equity, diversity, and inclusion of Indigenous communities and underrepresented communities.

Grantees will clearly articulate how their proposed effort drives at some or all of the following:

- Clarity of purpose and intended audience(s)
- Demonstration of support from communities/groups the project will directly serve
- Reflects Vancouver's Indigenous community and the City of Reconciliation priorities
- Reflects Vancouver's diverse community, through equity, diversity, and inclusionary practices and programs in programming, promotion, outreach, engagement, staff and volunteer recruitment, addressing needs of diverse or historically underrepresented/underserved communities
- Accessibility standards are incorporated to increase audience and participant accessibility
- Community engagement that enhances access, representation, and participation

This portion of the proposal may be supported by the following data indicators, as appropriate and available.

Data Indicators

- Participant surveys, data, and projections, artist data,
- Diverse community partnerships through Memorandum of Understandings and letters of support
- Demonstrated diverse community and artist engagement
- Key partners and stakeholders are identified, provided access to project resources, and included in decision-making as appropriate
- Alignment with City of Reconciliation priorities, including inclusion of Indigenous peoples arts, culture, awareness, and understanding, specifically for the Musqueam, Squamish and Tsleil-Waututh First Nations and urban Indigenous community
- Inclusionary and accessibility programming inventory
- Board, staff, and volunteer composition demographic data
- Equity, accessibility, and inclusionary policies for hiring, programming, engagement, and volunteer recruitment practices
- Harassment and anti-discriminatory policies

4. ENGAGED

Advances opportunities to engage, collaborate and partner on innovative solutions, programs, and operating techniques.

Grantees will clearly articulate how their proposed effort drives at some or all of the following:

- Enables innovation in cultural entrepreneurship, business model and operating practices
- Enhances capacity to experiment, take risks, and engage
- Creates opportunities for new partnerships, collaboration, shared space and/or co-location, within the sector as well as across sectors and disciplines

- Demonstrates potential to leverage additional funding
- Process for users (artists or other organizations) to access space and participate in the space programmes and management.
- Reflects innovation in community engagement and participation
- Enables programmes, production, and other activity to expand opportunities for cultural participation
- Demonstrates evidence of community partnerships and opportunities

This portion of the proposal may be supported by the following data indicators, as appropriate and available.

Data Indicators

- Participant surveys, data and projections
- Partnership letters of commitment including Memorandum of Understanding (including community, non-profit, for-profit, and promotional partners)
- Demonstration of partnership alignment with facility vision
- Evidence of community engagement (e.g. participation in planning sessions, etc.)
- Evidence of programme development and/or expansion based on facility investments (i.e. data collection, partnership contracts, enrollment, etc.)
- Demonstration of co-located and/or multi-use functional spaces
- Functional use demonstrates multiple lines of programming for participants and partners
- Surveys, letters, contracts, and other data indicating programmes will expand and/or relocate to activate proposed facility(ies)

- Key stakeholders identified on community-based committees, teams, boards, etc. reflect a range of institutional engagement (community, industry, public sector, etc.)
- Demonstration of multiple levels of funding support (e.g. sponsorships, grants, cross-sector and/or public-private partnerships, etc.)

5. READY

Readiness demonstrated through past accomplishments, current capacity, and forward-looking planning efforts that drive toward adaptability and ongoing, dynamic creation of public value.

Grantees will clearly articulate how their proposed effort drives at some or all of the following:

- Organizational readiness, including management, capital planning, fundraising, and operations
- Fiscal responsibility
- Project team with experience and capacity, including leadership
- Solid governance model and management plans including required experience to operate space
- Clear affordable user fee structures
- Plans meet building, codes, safety and accessibility standards
- Plans in place and capacity to adapt to changing sector needs

This portion of the proposal may be supported by the following data indicators, as appropriate and available.

Data Indicators

- User fee structure, that include range of affordability
- Needs assessment,

- Functional programme and feasibility plan
- Viable business plan (includes appropriate operating model and five year financial plan)
- Operational budget with diverse revenues
- Realistic capital funding strategy includes diverse private and public support.
- Fundraising feasibility study completed
- Governance board structure reflects industry best practices and focused intent on project (e.g., has committees prepared to address capital development, has legal/real estate/fundraising expertise)
- Project team bios including staff and consultant expertise

Project plan and timeline, with feasible pre-design planning, design and construction and occupancy plan