



Creative Spaces Case Study Series
Best Practices Report
March 2020

This Creative Spaces Case Study Series is supported by:



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Introduction

ArtsBuild Ontario

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

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

ABO has published case studies on nineteen arts organizations who have completed a capital project, as part of our Creative Space Case Study Series. These projects vary in size, scope and operating models. The goal of these case studies is to enable other organizations with best practices, knowledge and resources to both develop and sustain their creative spaces.

About the Best Practices Report

This Best Practice Report summarizes the key learnings from all nineteen case studies in the Creative Space Case Study Series. It is intended to provide arts managers and organizations considering or taking on a creative space capital project with insights into common successes and challenges experienced by the organizations highlighted in this report.

The report is divided into five sections:

1. **What** (what were organizations building and creating)
2. **Why** (why capital projects were executed)
3. **Who** (who these creative spaces serve and who supported the projects)
4. **How** (how were projects supported)
5. **The Ongoing** (how are creative spaces maintained/operated? What lessons were learned?)

Each section will share summaries from each case study and compare similarities and differences across these projects. All individual case studies and related webinars can be found in the resources section of this report, as well as on The Creative Space Case Studies Project page on ABO's website.

We would like to thank the nineteen organizations that have shared their stories, challenges and successes with ABO, equipping other arts organizations with best practices to sustain stronger cultural infrastructure across Ontario.

Case Study Partner Organizations

The following organizations have partnered with ABO in the Creative Space Case Study Series and are included in this Best Practices Summary:

- Canadian Automotive Museum – Oshawa
- Carousel Players – St. Catharines
- Dundas Museum and Archives – Dundas
- Dundas Valley School of Art – Dundas
- FirstOntario Performing Arts Centre – St. Catharines
- Gallerie SAW Gallery – Ottawa
- Great Canadian Theatre Company – Ottawa
- Idea Exchange: The Old Post Office – Cambridge
- The Lighthouse Festival Theatre – Port Dover
- Meridian Arts Centre (formerly Toronto Centre for the Arts) - Toronto
- Meridian Hall – Toronto
- Miles Nadal Jewish Community Centre: The Al Green Theatre – Toronto
- Ottawa Art Gallery – Ottawa
- Stratford Perth Museum – Stratford
- The Tett Centre for Creativity and Learning – Kingston
- The Theatre Centre – Toronto
- The Thunder Bay Art Gallery – Thunder Bay
- Trinity-St. Paul's & Tafelmusik: Jeanne Lamon Hall – Toronto
- The Westdale Theatre – Hamilton

Best Practices Report

1.0 Project Backgrounds

- **The Canadian Automotive Museum** in Oshawa, located within a former car dealership, began the journey to renovate and refresh its space in 2015. The museum's capital project saw the installment of insulated metal cladding, new doors and safety lighting to improve the exterior façade and the integration of a new HVAC system.
- **Carousel Players** in St. Catharines, in 2016, moved out of their former space at The Old Courthouse - which served as administrative, rehearsal and performance space - to three new venues. Silver Spire United Church now houses their administrative offices, the Niagara Folk Arts Multicultural Centre provides storage, rehearsal and performance space, and Brock University provides play development space. The bulk of this move into three spaces consisted of disassembling the stage and moving special equipment from The Old Courthouse and reinstalling it in the Niagara Folk Arts Multicultural Centre.
- **Dundas Museum and Archives** took on an expansion/re-design project in 2011-2013. This project included a double-height atrium connecting the museum to the Pirie House (a heritage home on the museum's property, used for programming and rentals), a barrier free entrance, elevator installation as well as a redesign to accommodate a third gallery space and reference room.
- **Dundas Valley School of Art** is a non-profit arts school located in the heart of downtown Dundas. In 2010, the DVSA's capital project aimed to restore and renovate its heritage building, while also modernizing the school and addressing the needs of students and teachers. Their project saw the installation of an elevator reaching all levels, the integration of a new HVAC system, environmentally-improved services and interior renovations to classrooms, the lobby, and the gallery.
- **FirstOntario Performing Arts Centre**, located in downtown St. Catharines, was a capital project that took over 12 years to complete. Opening in 2015, this project resulted in a 95,000 square foot cultural complex, composed of four state-of-the-art performance venues including the Partridge Concert Hall, Recital Hall, Robertson Theatre, and Film House. Through a partnership with Brock University, the school has access to the Recital Hall and the Film Theatre for performances, screenings, and lectures.
- **Gallerie SAW Gallery**, located in Ottawa, undertook a renovation and relocation of its gallery and club space during the Arts Court renovation project with the City of Ottawa in 2015. This project allowed SAW Gallery to move into the Ottawa Art Gallery's former space, renovate to accommodate two feature exhibition spaces and provide administrative space. The former Club Saw space was also renovated to create a live performance venue and large outdoor patio. A circumpolar artistic research space called the Nordic Lab was also constructed as part of this capital project.

- **The Great Canadian Theatre Company** is Ottawa’s largest professional independent theatre, offering a wide range of artistic programming each year. In 2018, the Company underwent a capital project in partnership with Windmill Development to create a mixed use condo and theatre space. The Commons houses the Irving Greenberg Theatre Centre, which includes a 262-seat mainstage theatre, a flexible black box studio theatre, and two spacious lobbies, has allowed GCTC to expand its activities and become a hub for community-based and artistic activities.
- **Idea Exchange: The Old Post Office**, located in Cambridge, was a restoration and expansion project under Idea Exchange and the City of Cambridge. This capital project saw the Old Post Office re-purposed into a modern community library and resource centre, opening its doors in 2018. The project included renovations, restorations, and additions that doubled the existing space by adding 9,000 square feet to the historic structure. The rise of makerspace and digital literacy programs ultimately inspired this capital project.
- **The Lighthouse Festival Theatre in Port Dover** has taken on four capital projects within the last 10 years: lobby renovations (installation of an elevator, rejuvenation of lobby/box office, restoration of historic brick walls); the “Room to Roam” expansion project which saw the purchase of the adjoining building to the theatre; acquisition and renovation of their Rehearsal Hall; and their “Get Cheeky” theatre seating project.
- **Meridian Arts Centre** (formerly Toronto Centre for the Arts) in 2015, renovated their mainstage to create two smaller theatre spaces: the Greenwin Theatre (296 seats) and the Lyric Theatre (574 seats). This project responded to changing theatre audiences and the needs of its theatre community.
- **Meridian Hall** (formerly known as The Sony Centre for the Performing Arts) located in Toronto, underwent a number of capital projects from 2016 – 2018. These projects focused on the replacement of the theatre’s rigging system, the restoration of limestone cladding for the entire building’s envelope, enhancements to the loading dock, power and communication upgrades to the theatre’s lighting system and more. Each of these renovations was an individual project with its own timelines, though they often overlapped. These projects were also the result of a 10-year plan that was developed after an assessment of the current condition of the building.
- **Miles Nadal Jewish Community Centre: The AI Green Theatre** underwent renovations from November 2017 to September 2019 to improve accessibility for their patrons. The project upgrades addressed accessibility of the stage, seating, the venue itself and related technology. The MNJCC replaced the seating of the venue with a modular system to maximize space usage. They also purchased a non-electric portable stage lift for the theatre, and installed push buttons and light access for all eight doors of the facility. Lastly, the MNJCC retrofitted the audio system to better enhance performances and presentations. A 60-foot wide screen that comes down from the proscenium was installed as well.
- **The Ottawa Art Gallery**, in 2015, took on a new capital project as part of the Arts Court redevelopment, which involved a private/public partnership model between the gallery, City of

Ottawa and hotel/condo developers. The project saw the gallery grow from 12,000 to 55,000 square feet allowing for more programming, exhibition, rental, storage and community space.

- **Stratford Perth Museum**, in 2008, purchased, renovated and built an addition to a 4,700 square foot Victorian House for rotating exhibitions and their permanent collection. The purchase of the building allowed the Museum to establish a permanent home, fulfill its strategic plan and increase earned revenues with more space for exhibitions and programs.
- **The Tett Centre for Creativity and Learning** in Kingston saw the rejuvenation of the J.K. Tett Centre into a creative hub in 2015, located beside the Isabel Bader Centre for the Performing Arts, resulting in the establishment of an arts cluster within the City of Kingston. Now home to 11 arts organizations of varying disciplines, the Tett Centre for Creativity and Learning provides community arts programming as well as rentals.
- **The Theatre Centre** in Toronto is a nationally-recognized live-arts incubator that serves as a research and development hub for the cultural sector. To acquire a more permanent home, the Theatre Centre's capital project saw the complete renovation of the Carnegie Library at 1115 Queen Street West in 2012-14.
- **The Thunder Bay Art Gallery** is a non-profit public art gallery that, in 2009, embarked on a large-scale capital project to develop a new purpose-built facility on the shore of Lake Superior. With construction expected to begin in 2020 or 2021, designs for this new facility include six exhibition spaces, three multi-purpose rooms for programming, a climate-controlled storage unit, a café, and an expanded gift shop.
- **Trinity-St. Paul's & Tafelmusik: Jeanne Lamon Hall** in Toronto, in 2013-16, was renovated to better serve long standing partner Tafelmusik and the wider arts community. The project included enhanced acoustics, improved seating, and lobby renovations.
- **The Westdale Theatre** saw the restoration and re-development of the Westdale heritage building, located in Hamilton's Westdale neighbourhood. With the building originally purchased in 2017, the Westdale's capital project transformed a 1935 theatre into a cinematic cultural hub after restoring the building's infrastructure, modernizing its interior and reinstating operations.

1.1 Operating Models and Project Timelines

The operating model and scope of a capital project can determine the planning, execution and ongoing maintenance for an arts organization. The capital projects in this case study series cover a wide range of timelines spanning from 2 months to 25 years. On average, projects took approximately 6 years from planning to completion. The timeline for any capital project is dependent on a variety of factors, including leadership, operating models, financial resources, community/stakeholder buy in, and contingencies, making each timeline captured in this project specific to the organization and respective capital project.

ORGANIZATION	PROJECT	PROJECT TIMELINE
Canadian Automotive Museum Operating Model: Owns and operates space.	Major renovations to the Museum’s exterior, as well as the integration of a new HVAC system.	2 Years
Carousel Players Operational Model: Rents space from others and does not operate it.	Moving from one venue to three venues to house programming, office and rehearsal space. Main component was deconstructing and reconstructing stage.	2 Months
Dundas Museum and Archives Operating Model: Owns and operates space. Rents out spaces to arts and community groups.	Expansion and redesign of museum building and historic Pirie House.	2 Years
Dundas Valley School of Art Operating Model: Owns and operates space.	Restoration and enhancement of the school’s three-storey heritage building: interior renovations, development of a media centre and dark room for community use, restoration of the school’s library, implementation of an elevator reaching all levels, the installation of a new HVAC system, and repositioned interior lighting.	3 Years
FirstOntario Performing Arts Centre Operating Model: Municipally-owned and operated. Rents out spaces to arts and community organizations.	Executed a completely new build with the partnership of the City of St. Catharines and Brock University, and developed a performing arts centre in downtown St. Catharines.	9 Years
Gallerie SAW Gallery Operating Model: Rents space from others and operates space. Rents	Moving and renovation of new space within Arts Court for Gallerie SAW Gallery, Club SAW expansion and construction of Nordic Lab.	10 Years

out spaces to arts and community groups.		
The Great Canadian Theatre Company	Permanent relocation to the Irving Greenberg Theatre Centre. Capital project saw the theatre constructed within the first two floors of a condo.	10 – 12 Years
Operating Model: Owns and operates space. Rents out spaces to arts and community groups.		
Idea Exchange: The Old Post Office	Re-developed the Old Post Office heritage building and transformed it into a modern community library and resource centre.	4 Years
Operating Model: Municipally-owned and independently-run. Rents out spaces to arts and community groups.		
Lighthouse Festival Theatre	Series of large- and small-scale capital projects that involved lobby renovations, expansion, purchase/renovation of a rehearsal hall and seat restoration.	4 Years
Operating Model: Owns and operates space. Rents out spaces to arts and community groups.		
Meridian Arts Centre	Renovation of 1,800 seat Main Stage theatre space into two smaller theatres: the Greenwin Theatre which is 296 seats and the Lyric Theatre which is 574 seats.	3 Years
Operating Model: Municipally owned and independently operated. Rents out spaces to arts and community groups.		
Meridian Hall	Executed several capital projects, including replacing the theatre’s rigging system, restoring the limestone cladding for the entire building’s envelope, making enhancements to the loading dock, making power and communication upgrades to the theatre’s lighting system, and more.	1 Year (for each project)
Operating Model: Municipally-owned and operated. Rents out spaces to arts and community groups.		
Miles Nadal Jewish Community Centre: The AI Green Theatre	Improving accessibility of the stage, seating, the venue itself and related technology. Purchasing and installing new systems to replace older systems.	2 Years
Operating Model: Owns and operates space. Rents out space to arts and community groups.		

<p>Ottawa Art Gallery</p> <p>Operating Model: Municipally owned and independently operated. Rents out spaces to arts and community groups.</p>	<p>Part of the Arts Court redevelopment, the Ottawa Art Gallery built a new facility in partnership with the City of Ottawa and private developers, creating a facility four times its original gallery size.</p>	<p>16 Years</p>
<p>Stratford Perth Museum</p> <p>Operating Model: Owns and operates space. Rents out spaces to arts and community groups.</p>	<p>Purchase and retrofitting of Victorian house and 11,000 square foot addition.</p>	<p>2 Years</p>
<p>The Tett Centre for Creativity and Learning</p> <p>Operating Model: Municipally owned and independently operated. Rents out spaces to arts and community groups.</p>	<p>Renovation of J.K. Tett Centre and redesign as a multidisciplinary creative hub. Space is provided to arts tenants, who also provide arts programming as part of their contribution to the space.</p>	<p>10 Years</p>
<p>The Theatre Centre</p> <p>Operating Model: Municipally owned and leased by The Theatre Centre. Rents out space to arts and community groups.</p>	<p>Permanent relocation to the Carnegie Library, re-developed as a facility for the Theatre Centre.</p>	<p>2 Years</p>
<p>Thunder Bay Art Gallery</p> <p>Operating Model: Owns and operates space. Rents out space to arts and community groups.</p>	<p>Plans to develop a new facility located on the shore of Lake Superior. This increase in space will improve collections storage, programming etc.</p>	<p>2009 - Present</p>
<p>Trinity St. Paul's Centre for Faith Justice and the Arts</p> <p>Operating Model: Owns and operates space. Rents out spaces to arts and community groups.</p>	<p>Renovation of sanctuary and lobby within Trinity-St. Paul's in partnership with Tafelmusik to improve acoustics, ascetic, seating and congregation/patron experience.</p>	<p>25 Years</p>
<p>The Westdale Theatre</p> <p>Operating Model: Owns and operates space. Rents out space to arts and community groups.</p>	<p>Restored and re-developed the Westdale heritage building, transforming it into a cinematic cultural hub.</p>	<p>2 Years</p>

2.0 The Need for a Capital Project

The below graph identifies the common needs, shared across all case studies, that motivated organizations to undertake a capital project.



Accessibility was a key need identified by 73% of organizations undertaking a capital project. For 58% of organizations, factors included rental space and community awareness. Fifty-three percent of organizations additionally focused on programming space and growth. Similarly, 32% highlighted the importance of increased storage, while 26% focused on rehearsal space. Administrative space was significant to 21% of organizations, and 16% of organizations valued heritage preservation/restoration. Eleven percent identified a need for operational changes, energy efficiency, and a reduction in costs. Lastly, 5% of organizations used their capital projects to primarily address issues related to health and safety.

Many organizations conducted studies and issued surveys to stakeholders to validate and shape the needs for their projects. These included feasibility studies, needs assessment, spatial needs assessments, viability analyses and market analyses. Smaller organizations in this case study series did not complete formal feasibility studies; rather they sought out confirmation internally through patron surveys, consultations with municipal leaders and members of their communities, or by observing needs through direct management of their facility. Larger organizations, often municipally-owned, completed formal studies with third party consultants, such as Artscape, Lord Cultural Resources, Westbury National, Architecture49inc., Cobalt Connects, Levitt Goodman Architects Ltd., Martin Vinik Planning for the Arts and Urban Strategies Inc., ERA Architects Inc., Net Firms and Diamond & Schmitt Architects.

2.1 Accessibility & Inclusion

All projects incorporated accessibility into their capital projects starting in the planning and design stages. City-owned projects engaged accessibility advisory committees and consulted municipal

Accessibility Departments to review audits and designs. Additionally, these projects allowed committees and departments to experience the spaces while under construction.

Some organizations, that were not municipally-owned, also executed accessibility audits. Invisible disabilities and experiential accessibility were considered in many of these audits. Generally, projects incorporated the following elements:

- accessible seating (in some cases, accessible seating was spread throughout a theatre space instead of one designated area)
- elevator lifts
- drop off locations
- accessible washrooms
- all gender washrooms
- tactile flooring
- adult change tables
- increased space in dressing rooms
- push button-activation at all emergency exits
- strobe lights
- audio alarms

For example, a priority for The Westdale Theatre during renovations was ensuring the venue was fully accessible. The plan ensured ramps were installed in and outside of the building, that closed captioning was available for film showings, and that technological aid devices were made available to audience members. Likewise, the Ottawa Art Gallery went beyond code and installed all-gender washrooms.

2.2 Energy Efficiency

The majority of organizations completed LED lighting retrofits during major renovations. Projects that were new builds planned to install energy-efficient systems from the start of the project. Leadership in Energy and Environmental Design (LEED) certification was pursued by several organizations for their capital project. The Ottawa Art Gallery, the Tett Centre, and Idea Exchange's Old Post Office are all LEED-certified buildings. Other energy-saving aspects included new and improved HVAC systems, insulated doors and combined structures, and complete upgrades to electrical and mechanical systems.

2.3 Community Engagement

The majority of organizations credit their community for shaping the vision of their capital projects. Many held community consultations to inform the planning and design of their future creative space. Round tables and one-to-one interviews during feasibility studies also engaged key stakeholders. These sessions demonstrated organizations were responding to the needs identified by those they serve and often aided organizations in securing community buy-in for their projects as well as support from municipalities.

3.0 Who the Space Serves

In almost all cases, the capital projects were tied directly back to the organizations' mandates and purpose. The arts organizations participating in the case study series were consistent in looking to better serve their existing audiences and reach new ones. The majority of projects were also looking to provide more accessible spaces.

Most organizations wanted to better reach their communities by amplifying their presence with a new capital project; oftentimes introducing or expanding space rentals was top of mind. These include both artist/non-profit rentals and community/corporate rentals. Considerations in capital project plans included discipline-specific additions, such as accessible backstage areas, modular storage, accessible seating, additional collection space as well as other amenities like bars and cafes, kitchen access, increased programming space and outdoor event spaces – all of which would better serve new and existing stakeholders across the communities.

3.1 Project Leadership and Partners

The leadership of each of the capital projects in this study reflected the different operational models of the respective arts organizations and the scope of their capital projects.



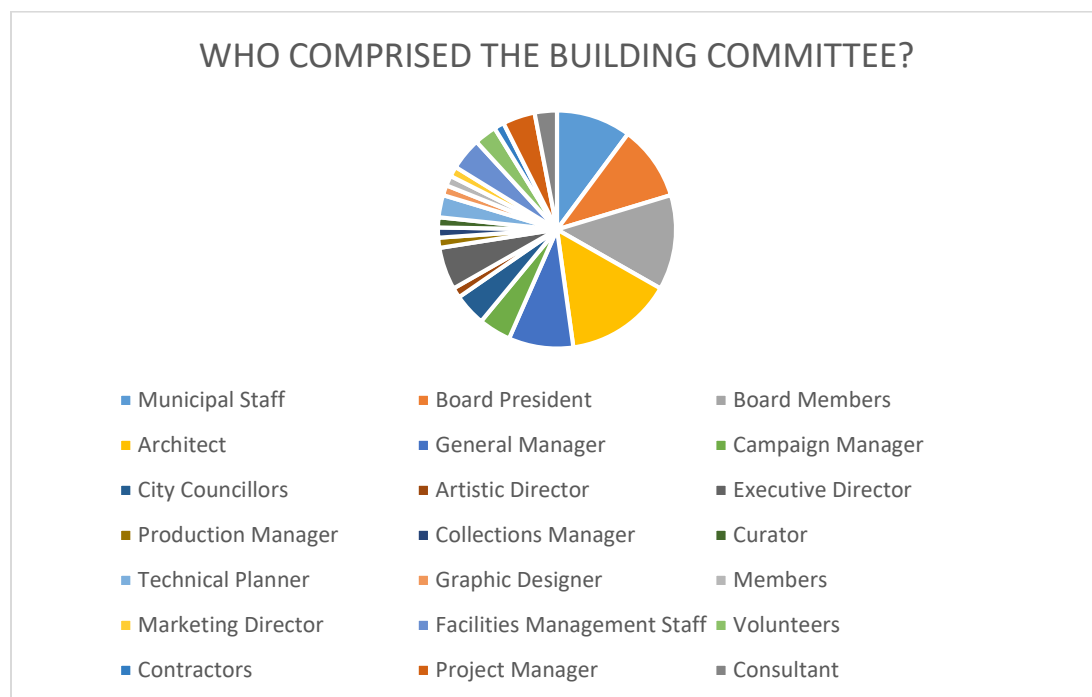
The Boards of Directors were involved in 53% of the capital projects, with Executive Directors at 42%. Thirty-seven percent involved leadership from General Managers and Artistic Directors, while Municipalities led 32% of the projects. Sixteen percent involved a Project Manager, and 11% involved Curators, Tenants, City Councillors, Facilities Managers, and Volunteers. Five percent of projects involved Music Directors, Production Managers, Technical Directors, Consultants, and Boards of Trustees.

The majority of projects were led by senior leaders in the organization - most often the Executive Director and the Board of Directors. In municipally-owned buildings, the city took a leadership role, but worked in tandem with operational partners in overseeing the capital project, often providing support in the form of human resources or funding for increased operations. For example, the City of St. Catharines partnered with Brock University to build the FirstOntario Performing Arts Centre after the need to develop a multi-purpose performing arts centre alongside the Brock Centre for the Arts was identified. Similarly, other organizations engaged with municipalities as partners and consulted with them on a regular basis to discuss any project updates regarding cost, timeline, revisions and more.

Facility owners and managers were primary partners in capital projects where arts organizations did not own their buildings, but were undergoing a capital project. Many identify their municipalities and funders as key partners and supporters.

3.2 Building Committee and Contractors

These committees were comprised of staff and board members, partners, municipal staff, politicians and key stakeholders invested in the space/organization. Some organizations had existing facility committees that took on the steering of capital projects; but most created building committees solely for the duration of the project. It is worth noting that each building committee brought in the expertise needed for the specific project.



Fifty-three percent of organizations noted that Architects were part of their building committees and/or were involved in the general building process. Forty-seven percent of capital projects included Board

Members and 37% included municipal staff. General Managers sat on 32% of building committees, with Executive Directors at 21%. Campaign Managers, City Councillors, and Facilities Managers sat on 16% of building committees, while Technical Planners and Volunteers were involved in 11% of projects. Lastly, 5% of building committees included Production Managers, Artistic Directors, Collections Managers, Curators, Graphic Designers, Marketing Directors, Contractors and Consultants.

Municipally-owned spaces were required to undergo a competitive bidding process in order to hire contractors, but other organizations also issued Requests for Proposals (RFPs). In many cases, municipalities included stakeholders and project partners in the RFP process. Organizations worked with general contractors such as: Ira McDonald Construction Ltd., Eastern Construction Company Ltd., Architect Goldsmith Borgal & Company Ltd., Patkau Architects, Brook McIlroy, and Diamond Schmitt Architects.

Some organizations reached out to general contractors that had completed projects in the past and were familiar with their facility/operational needs. In rare cases, organizations such as the Miles Nadal Jewish Community Centre (MNJCC) did not have their project architect go through a formal RFP process, as the architect was familiar with the organization and had done previous work with them. In addition to the building contractors, other specialists were hired to accommodate specific aspects of a project, such as an acoustician or a heritage consultant.

3.3 Project Opposition

Some of these projects did encounter opposition from neighbouring properties about the consequences of an expansion project, such as excessive noise from special events or obstructed views.

Some projects experienced criticism from community members about municipal funding to support the creative space projects. Idea Exchange and the City of Cambridge experienced this from some citizens who expressed fear of increasing municipal deficits, for example. Some organizations identified that parts of their community criticized how public funds were invested in municipal projects, or that the funding landscape proved challenging due to political climate and government priorities at the time.

This cost-related opposition was often met with organizations and municipalities reaching out to their communities about how the benefits of the project would outweigh the costs. There were commonalities with the strategies that organizations implemented to resolve project opposition. Keeping lines of communication open with those who opposed their project was key. This included updating municipal staff, neighbours, the local community and the media on the progress of the project Initiatives including offering tours and meeting one-on-one with neighbours. This allowed the community to witness the transformation and provided continuous engagement in the projects.

4.0 Concept to Construction

A majority of organizations shared three commonalities when it came to the deciding factors that moved their project from the conceptual phase into the building phase:

- 1) Needs were identified by the community through outreach and feedback
- 2) A business plan was developed for organizational sustainability and growth
- 3) Funding was confirmed that allowed the project to move forward

Over half of organizations executed a feasibility study. Funding for these capital projects included a combination of grants, municipal funds, existing capital reserve funds, extended lines of credit, and/or remortgaging of property. For municipal projects, the design and building phases followed council approval to move the project forward. Projects also gained momentum when firm leadership was in place – usually the Board Chair, Executive Director/General Manager, Project Manager, and/or City councillors – and when a unified vision was struck between partners and stakeholders.

4.1 Construction Plans

Many projects took on a design-build method to allow for flexibility in the construction phases of the project, include room for contingencies, management of all contractors to ease internal human resource capacity value engineering measures. Construction plans were developed by contractors. Contractors included architects, engineers and other sub-contractors as necessary to the process. These plans were brought back to the building committee for approval. Day-to-day decisions were often made by the Project Manager, who was usually part of the contractor team or the organization’s leadership. Some organizations engaged key stakeholders, such as anchor tenants and commercial partners to provide input on the design phase. Some also invited the community to provide feedback on the proposed designs of the new space at town halls.

For larger projects, construction plans were broken down into phases based on the scope of the project. For example, Trinity-St. Paul’s and Tafelmusik renovated the sanctuary prior to the lobby to prioritize the space for performances. The Meridian Arts Centre constructed the Greenwin Theatre, with smaller seating space, to take pressure off the high demand of the Studio Theatre and focus on the more intricate design of the Lyric Theatre.

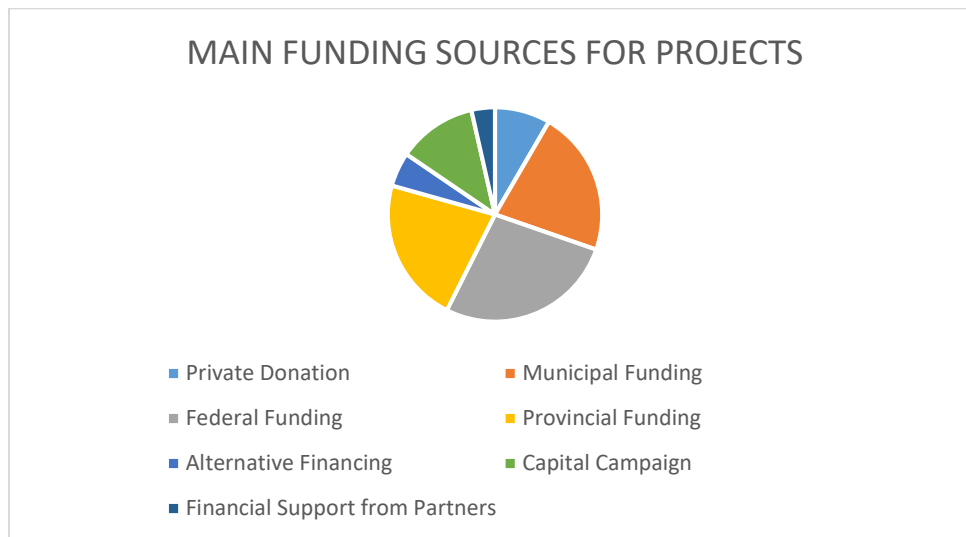
What is a “design-build” process?

Design-build is a form of project delivery where an owner contracts, under a single contract, with one entity (a design-builder) to provide and take contractual responsibility for both the design services and the construction. – The Canadian Construction Documents Committee

What is “value engineering”?

Value Engineering is a creative, organized effort, that analyzes the requirements of a project for the purpose of achieving the essential functions at the lowest total costs (capital, staffing, energy, maintenance) over the life of the project. Through a group investigation, using experienced, multi-disciplinary teams, value and economy are improved through the study of alternate design concepts, materials, and methods without compromising the functional and value objectives of the client. ([Whole Building Design Guide](#))

4.2 Financing



Each project took on a different funding model depending on resources and the scope of the project. The majority of projects secured public funding from federal, provincial and municipal grants.

These included:

- Canada Cultural Spaces Fund
- Ontario Trillium Foundation
- Ministry of Agriculture and Rural Affairs
- Toronto Culture Build Investment Program
- Community foundations

Other sources of funding included:

- Private donations
- Capital campaigns
- Line of credit
- Reserve funds
- Remortgaging properties
- Loans

Eighty-four percent of organizations said that they used federal funding as their main funding source. Sixty-eight percent of organizations said that they primarily used provincial and municipal funds to fund their projects, and 37% of organizations stated that their main source of funding was through capital campaigns. Private donations were the primary funding source for 26% of capital projects, 16% used

alternative financing, and lastly, 11% used financial support from project partners as their main funding sources.

Multi-partner projects, such as Trinity-St. Paul's/Tafelmusik, the Tett Centre for Creativity and Learning/City of Kingston/arts tenants, Idea Exchange/Monogram Coffee Roasters and the Ottawa Art Gallery/Arts Court saw private partners make contributions to the vision of the project. These included private developers, post-secondary institutions, commercial partners, a congregation, and future tenants of the space.

Organizations that held a capital campaign include:

- Lighthouse Festival Theatre
- Dundas Museum & Archives
- Galerie SAW Gallery
- Ottawa Art Gallery
- Stratford-Perth County Museum
- Trinity-St. Paul's and Tafelmusik
- Dundas Valley School of Arts
- The Theatre Centre
- The Westdale Theatre
- Thunder Bay Art Gallery
- FirstOntario Performing Arts Centre

While these capital campaigns covered only 10-20% of the project costs and were not often a main funding source, it is still noteworthy that a majority of organizations pursued a capital campaign for their project. These campaigns also had a lower fundraising goal for more attainable results, which in turn gained community buy through investment in the project.

Organizations that did not use grants had a healthy capital reserve fund and self-funded the projects; for example, one organization extended its line of credits and remortgaged its property to support an \$800,000 project.

4.3 Contingencies

Unexpected changes during construction affected the timeline and budget of each project. Performance venues needed to plan or find uninterrupted time for renovations. Some heritage buildings also required organizations to secure specific permits, the cost of which came as a surprise in some cases. Other contingencies responded to problems in the structure of the building – whether a wall was too old to sustain the impact of construction or asbestos remediation was needed before any more construction work was completed. During construction, the amount of cleanup required was also an unexpected concern. Many organizations managed this by remaining flexible in their planning, often incorporating a buffer to allow for variances in the timeline of their capital projects. They also took advantage of both the design build process and value engineering during the building phase of the project. These plans

allowed them to stay within budget. On average, organizations planned for a 15% contingency in their capital project budgets, but upon reflection, several said they would have set aside more.

4.4 Day-to-day Operations

Many organizations that took on a major renovation or new build chose to close their facilities while under construction. Those that were operational before construction needed to account for lost revenues. In most cases, staff were overworked during the construction period. To resolve this issue, schedules were often set, monitored and adjusted to ensure that staff were not overwhelmed by maintaining day-to-day services during the construction phase. Many also offered programming offsite or operated out of alternate locations. Day-to-day operations and staff burn out are major consideration for all organizations as these kinds of renovation projects impact all levels of operations.

5.0 Projecting New Financials

To project new financials, organizations used a combination of a business plan, which in most cases was created ahead of the capital project, and outside advisors. Some organizations researched sample budgets and consulted similar venues as well as their own feasibility studies from the early stages of the project to form a new budget. Each financial plan for the new space(s) included staff, operations and maintenance, and rentals. If the new space was significantly larger or changed the scope of the organization's operations, these extra costs were incorporated in the new budget.

Several organizations that were expanding their rental programs through their capital project underestimated rental revenues in the first year. – however, what they gained in revenue was offset by the unforeseen expense of hiring additional staff to manage the increased activity. One organization mentioned that it took three years to see a profit through rentals, as they had to outfit the space to meet the specific needs of the theatre companies, a new rental audience that they wished to attract. However, as this was part of the organization's business plan, it was anticipated.

In terms of energy costs, some mentioned that they both over and under estimated energy savings in the first year of operations. Some organizations paid the same energy costs previous to their project or significantly less than anticipated, but this depending on the scope of work invested in energy efficiency aspects of their project.

In some cases, staff positions increased or changed to reflect the current needs of the new creative space. Depending on the organization's use of space, staff positions were expanded or added. These included General Managers, Facility Coordinators, Custodians, Technical Support, Development Staff, Front of House, Marketing Staff, and Curatorial Staff. Often times, staffing needed to increase or be adjusted to respond to the growing needs of the space.

In other cases, non-profits operating out of municipally-owned facilities received an increase in operating from their respective cities to account for a larger footprint or larger operating models. For

organizations that were not municipally-owned, the increase in operational costs was often offset by space rentals.

Some organizations also increased costs for services at their venue, justifying this decision with the improvements made by their capital projects.

5.1 Asset Management and Capital Reserve

Many organizations incorporated asset management into the ongoing operational plans following the completion of their projects. Over half of the organizations utilized a capital reserve fund, which they also used in conjunction with their asset management plans. Municipally-owned buildings are maintained by their city; however, the non-profits operating the facility are responsible for outfitting the space and maintaining rental equipment, and they track these assets internally. Organizations with working boards often had a member track their facility assets and manage a capital reserve fund. Organizations with an established capital reserve fund are continually growing/maintaining it to support ongoing repairs and future capital projects.

5.2 Lessons Learned

The lessons learned by each organization are relative to each project. Most organizations that expanded their rentals program were not prepared for the demands on staff, logistics and resources. Spaces also reported that an increase in staff affected the dynamics and roles within the organization, and required an environment of fluidity. Many organizations also found value in setting a schedule of tasks for employees and revising the list as needed to avoid staff burnout during various phases of capital projects. Each organization emphasised that a dedicated and flexible staff was integral to the success of each capital project. Clear communication and frequent meetings were key to undertaking the expanded responsibilities of staff during the project.

The majority of organizations agreed that it was invaluable to have a Contractor and Architect involved in the construction process. Many also shared the importance of onsite verifications towards the end of the project to ensure all aspects of the renovation or capital build are functional. Any deficiencies left unresolved at the end of a building contract leaves the organizations with a future repair cost that is outside the project budget. When considering costs, several organizations emphasized the value in separating budgets during the planning process of their capital project. For example, recommendations were made by one organization to separate commercial and community initiatives. Testing new assets such as doors, cupboards and lighting well before the end of a building contract was recommended by organizations – otherwise, costs to address deficiencies often fall on the organization outside of the project budget/timeline. Many organizations agreed that, once a project starts, there is little to no opportunity to save money and recommended ensuring all costs efficiencies are explored in the planning and design phases of a project.

Another common lesson learned was that community expectations about a capital project could be different than internal expectations. For example, the mandate of one capital project was to provide

community arts programming from the tenants in the space – and while tenants anticipated scheduling attendance at programs in advance, the community expected a drop-in experience for arts programming. Likewise, another organization mentioned that patrons in a performance venue were not prepared for unplanned follow up work needed to address deficiencies following their capital project. Both organizations cited that communication and educational messaging can support stakeholders in understanding the goals and realities of their capital project. All organizations understood the significance of keeping an open dialogue with their communities during the execution of their capital project and the time thereafter.

Summary

While each aspect of the **what, why, how, who** and **the ongoing** remain specific to each organization and their capital projects – there are similarities between them. Every project considered its community as the primary visionaries for their projects. Clear lines of communication are needed between the project leadership, construction teams and staff – and building committees should be comprised of people with the skills needed to make an organization’s project a well-rounded process. A majority of funding for capital projects primarily came from federal funds, but projects were supported through a variation of public funds, donations and some form of alternative financing (loans or a line of credit). Finally, most organizations had a feasibility study and business plan to guide their new space’s sustainability both during and after their capital project.

We hope that arts organizations will use this Best Practice Summary, in addition to the case studies, to support their organizations, professional development and individual role in future creative space capital projects.

Resources

Case Studies

Canadian Automotive Museum (Oshawa, Ontario)

- [Download the English Case Study HERE](#)
- [Télécharger l'étude de cas en français ICI](#)

Carousel Players (St. Catharines, Ontario)

- [Download the English Case Study HERE](#)
- [Télécharger l'étude de cas en français ICI](#)

Dundas Museum and Archives (Dundas, Ontario)

- [Download the English Case Study HERE](#)
- [Télécharger l'étude de cas en français ICI](#)

Dundas Valley School of Art (Dundas, Ontario)

- [Download the English Case Study HERE](#)
- [Télécharger l'étude de cas en français ICI](#)

FirstOntario Performing Arts Centre (St. Catharines, Ontario)

- [Download the English Case Study HERE](#)
- [Télécharger l'étude de cas en français ICI](#)

Galerie SAW Gallery (Ottawa, Ontario)

- [Download the English Case Study HERE](#)
- [Télécharger l'étude de cas en français ICI](#)

Great Canadian Theatre Company (Ottawa, Ontario)

- Coming Soon

Idea Exchange, The Old Post Office (Cambridge, Ontario)

- [Download the English Case Study HERE](#)

- [Télécharger l'étude de cas en français ICI](#)

Lighthouse Festival Theatre (Port Dover, Ontario)

- [Download the English Case Study HERE](#)
- [Télécharger l'étude de cas en français ICI](#)

Meridian Arts Centre (formerly Toronto Centre for the Arts) (Toronto, Ontario)

- [Download the English Case Study HERE](#)
- [Télécharger l'étude de cas en français ICI](#)

Meridian Hall (Toronto, Ontario)

- [Download the English Case Study HERE](#)
- [Télécharger l'étude de cas en français ICI](#)

Miles Nadal Jewish Community Centre: The Al Green Theatre (Toronto, Ontario)

- [Download the English Case Study HERE](#)
- [Télécharger l'étude de cas en français ICI](#)

Ottawa Art Gallery | La Galerie d'art d'Ottawa (Ottawa, Ontario)

- [Download the English Case Study HERE](#)
- [Télécharger l'étude de cas en français ICI](#)

Stratford Perth Museum (Stratford, Ontario)

- [Download the English Case Study HERE](#)
- [Télécharger l'étude de cas en français ICI](#)

The Tett Centre for Creativity and Learning (Kingston, Ontario)

- [Download the English Case Study HERE](#)
- [Télécharger l'étude de cas en français ICI](#)

The Theatre Centre (Toronto, Ontario)

- [Download the English Case Study HERE](#)
- [Télécharger l'étude de cas en français ICI](#)

Thunder Bay Art Gallery (Thunder Bay, Ontario)

- [Download the English Case Study HERE](#)
- [Télécharger l'étude de cas en français ICI](#)

Trinity St. Paul's & Tafelmusik (Toronto, Ontario)

- [Download the English Case Study HERE](#)
- [Télécharger l'étude de cas en français ICI](#)

The Westdale Theatre (Hamilton, Ontario)

- [Download the English Case Study HERE](#)
- [Télécharger l'étude de cas en français ICI](#)

Webinars

[Working Together: Multi-Partner Creative Space Projects](#) (Ottawa Art Gallery and SAW Gallery)

[Alternative Creative Spaces and Adaptive Reuse Projects](#) (Trinity St. Paul's/Tafelmusik and Idea Exchange)

[Engaging Community in Municipal Performing Arts Space Projects](#) (Meridian Arts Centre and FirstOntario Performing Arts Centre)

[Volunteer Boards & Creative Space Projects](#) (Dundas Museum & Archives and Stratford Perth Museum)

[Capital Project Case Study: The Tett Centre](#) (The Tett Centre for Creativity & Learning)

[Community Partnerships & Creative Spaces, featuring Carousel Players](#) (Carousel Players)

[Restoring & Revitalizing a 1934 Independent Cinema – The Westdale Theatre](#) (The Westdale Theatre)

The Great Canadian Theatre Company Case Study Webinar (The Great Canadian Theatre Company)
(Coming Soon)