

THE CORPORATION OF THE CITY OF COURTENAY

NOTICE OF COMMITTEE OF THE WHOLE MEETING

*We respectfully acknowledge that the land on which we gather is the
unceded traditional territory of the K'ómoks First Nation*

DATE: Monday, November 25, 2019
PLACE: City Hall Council Chambers
TIME: 4:00 p.m.

AGENDA

K'OMOKS FIRST NATION ACKNOWLEDGEMENT

Pg #

1.00 STAFF REPORTS/PRESENTATIONS

(a) Financial Services

- 1 1. Grant-in-Aid and Other Forms of Financial Support Policy 1850.00.04 Revision

(b) Recreation and Cultural Services

2. Recreation Fees and Charges Review Workshop facilitated by Brian Johnson,
PERC
- 17 3. Cultural Services Report and Presentation - Patricia Huntsman, Patricia Huntsman
Culture + Communication

2.00 INTERNAL REPORTS AND CORRESPONDENCE FOR INFORMATION

- 109 1. Briefing Note - City and Downtown Courtenay BIA Wayfinding Proposal
- 211 2. Briefing Note - Finance Select Committee Interim Report No. 1 - 2019-11-21

3.00 RESOLUTIONS OF COUNCIL

1. Finance Select Committee Terms of Reference (TOR)

Suggested motion: that Council support the recommendation made by the Finance Select Committee (Council Select Committee on Alternative Asset Management Funding Sources and Levels of Service Options) in the November 21st, 2019 briefing note "Finance Select Committee Interim Report No. 1 - 2019-11-21" and amend the timeline identified in *Section 6 Reporting*, of the committee's Terms of Reference to read:

*"...the Committee will submit its findings and recommendations in a written report to Council no later than **January 6th, 2020.**"*

4.00 ADJOURNMENT



THE CORPORATION OF THE CITY OF COURTENAY

STAFF REPORT

To: Committee of the Whole

File No.: 1850-01

From: Chief Administrative Officer

Date: November 25, 2019

Subject: Grant-in-Aid and Other Forms of Financial Support Policy 1850.00.04 Revision

PURPOSE:

The purpose of this report is to provide Council with an updated draft Grant-in-Aid and Other Forms of Financial Support Policy and options for future administration of the Grant-in-Aid Program.

POLICY ANALYSIS:

The following resolution was passed by Council on January 21, 2019:

.05 Moved by Frisch and seconded by McCollum that based on the
2019 GRANT-IN-AID January 21st, 2019 staff report, "2019 Grant-in-Aid Requests", Council
REQUESTS receive the attached list of applicants and support OPTION 1 to direct
1850-01 Staff to remit Grant-in-Aid payment to the selected 18 applicants meeting
2 or more criteria, with a cap of \$15,000 per request; and

That staff include the disbursements in the draft 2019-2023 schedule of gaming funds distribution; and,

That staff be directed to review the Grant-in-Aid policy #1850.00.04 and clarify the eligibility criteria for future consideration.

Carried

Staff have reviewed policy #1850.00.04 and have updated it to clarify eligibility criteria and streamline the annual application process. This policy complies with Section (25) 1 of the *Community Charter*.

EXECUTIVE SUMMARY:

In 2016, the City revised and adopted a Grant-in-Aid Policy to respond to requests from the Comox Valley community organizations asking for grant money for a variety of projects. To create a transparent and efficient process, older policies were amalgamated and updated to require organizations to submit their grant application annually by August 1st so all requests could be simultaneously presented to Council. The Grant-in-Aid policy is silent on a specific procedure to evaluate and prioritize applications, as well as it does not specify a financial cap on the grant amounts. This presents a challenge for staff when evaluating the grant applications and making a recommendation to Council each year.

CAO RECOMMENDATIONS:

That based on the November 25, 2019 staff report, “Grant-in-Aid and Other Forms of Financial Support Policy 1850.00.04 Revision”, Council support Option 1 to approve the Provision of Grant-in-Aid and Other Forms of Financial Support policy 1850.00.04 as presented; and

That staff be directed to update the City website and advertise for the 2020 Grant-in-aid applications as soon as possible; and

That staff be directed to pursue the “Flow-Through Funds” opportunity with the Comox Valley Community Foundation for the 2021 grant year.

Respectfully submitted,



David Allen, BES, CLGEM, SCLGM
Chief Administrative Officer

BACKGROUND:

On October 31, 2016, City Council adopted a Grant-in-Aid and Other Forms of Financial Support policy 1850.00.04. It combined two older policies with the intent of providing a single process for the community organizations to follow when requesting financial assistance (see Attachment # 1). It identifies Gaming Fund revenues as the source of funding for grant payments and was first applied in early 2017.

Over the past three years the City has paid out approximately \$337,000 from the Gaming fund through this program.

During the 2019 Grant-in-Aid intake, staff noted in the report to Council on January 21, 2019 that the Grant-in-Aid policy was silent on a specific procedure to evaluate and prioritize the applications, therefore the following criteria were established and used to assist Council with their decision this year:

- Will the grant benefit the entire community (all ages and groups)?
- Will this grant be the only financial or in-kind support requested from the City?
- Did the organization apply for other sources of funding?
- Is the organization financially sustainable?

Staff also recommended a \$15,000 cap on each application for 2019 in order to stay within a financially sustainable amount and maximize the number of organizations that benefit from the Grant-in-Aid program.

In addition, the deadline for receipt of the Grant-in-Aid applications of August 1 has presented a challenge for Finance staff to manage as it conflicts with other deadlines in the department and is a very time consuming process.

DISCUSSION:*Gaming Funds Distribution Matrix:*

The 2019-2023 Gaming Funds Distribution Matrix was reviewed with the Finance Select Committee on October 25, 2019 and they will be making a recommendation to Council to provide an amount of \$50,000 each year dedicated to the Grant-in-Aid program. Attachment #2 provides the Draft 2019-2023 Gaming Funds Distribution Matrix which will be considered by Council once a final recommendation is made by the Finance Select Committee. Attachment #5 provides a detailed listing of the organizations that received a Grant-in-Aid in 2019 with the potential impact if \$50,000 were only available.

It should be noted that many of the Grant-in-Aid recipients also apply directly to the BC Gaming Commission for Community Gaming grants and are successful as well.

Revisions to the Grant-in-Aid Policy:

Based on the recommendation from the Finance Select Committee, staff have updated the Draft Grant-in-Aid Policy as follows:

1) Added the following criteria to evaluate the applications:

The following criteria will be considered to be eligible for a Grant-in-Aid:

- i. Must benefit the entire community (all ages and groups)
- ii. The request is the only financial or in-kind support from the City
- iii. Other sources of funding have been applied for
- iv. The organization is financially sustainable

2) Reduced the cap on each application to \$7,500 in order to stay within a financially sustainable amount and maintain the number of organizations that benefit from the program. A \$15,000 cap was used in 2019 when approximately \$100,000 was distributed.

3) Changed the application intake deadline to January 31.

Comox Valley Community Foundation Opportunity:

The Comox Valley Community Foundation (CVCF) is a federally registered charitable organization dedicated to enriching lives in the Comox Valley. The foundation is entrusted with gifts by people and organizations that recognize the uniqueness and vitality of the communities in the Valley, and work to maintain and strengthen these attributes by investing strategically in needed and innovative community-based solutions.

The Foundation has recently adopted a policy to allow for “Flow-Through Funds”, which are non-endowed donations where the principal is distributed to one or more charitable beneficiaries (Attachment #3). The City could pursue entering into an agreement with the foundation to administer the annual Grant-in-Aid program on Council’s behalf through the Community Enrichment Grants Program. There would be a nominal fee taken to manage this process as per the Administration Fees Policy (Attachment #4). The agreement would outline the following:

- Purpose and criteria
- Schedule
- How the funds are received and distributed
- Requirements for reporting back by both the Foundation and Recipients
- City Acknowledgement
- City access to success stories
- Opportunities for political cheque presentations

CVCF has just completed their 2020 grant intake, which will be paid to recipients in January 2020. The 2021 Grant intake will take place in August and September of 2020 with payments scheduled for January 2021. City staff have recently confirmed with the CVCF that the City of Courtenay would have time to enter into an agreement with CVCF for the 2021 intake in August 2020, however the City would need to continue to administer the program for 2020.

The grant in aid intake would normally take place in the summer with payment made early in the following year, however it was delayed this year pending the gaming fund review and policy revision through the newly formed Finance Select Committee. Now that the Finance Select Committee has reviewed the gaming policy and recommends Council to continue this program with a budget of \$50,000, pending Council approval the 2020 intake should begin as soon as possible.

FINANCIAL IMPLICATIONS:

Local Governments with gaming facilities within its jurisdiction are allowed to use Gaming Fund revenues for “any purpose within their legal authority”. For the last 3 years, the City’s approach has been to spend the balance of gaming funds from a previous year to support downtown arts and culture, various Council’s initiatives and projects, public safety and security, social initiatives, infrastructure works and green or innovation projects. In 2019, gaming funds from 2018 were used to fund the Grant-in-Aid requests.

The list of applicants to the City’s Grant-in-Aid program is longer every year. While each organization possibly has laudable reasons to request a grant, Council is faced with weighing the implications of using gaming funds for special interest groups versus using the funds for other City priorities such as:

- Funding for asset management and capital renewal;
- Funding the increased capacity to address sustainable service delivery;
- Funding the RCMP staffing or contributions to the Police Contingency Reserve;
- Contributions to bolster various reserves,
- Funding to support affordable housing and homelessness
- Financial resources for strategic land purchases or,
- Off-setting property tax increase for the community (for reference, \$230,000 is equivalent to approximately 1.0% tax increase)

ADMINISTRATIVE IMPLICATIONS:

Approximately 60 hours of staff time is spent to process the grant applicants and payments each year. An additional 10 hrs of staff time have been dedicated to updating the policy and investigating the CVCF opportunity. Once the revised policy is approved, staff will immediately update the City website and advertise the 2020 Grant-in-Aid intake. If Council wishes to move forward with pursuing the CVCF opportunity for 2021, staff would immediately start working with CVCF staff to establish an agreement for Council’s consideration early in 2020 and notify recipients and the public shortly thereafter.

ASSET MANAGEMENT IMPLICATIONS:

Utilization of gaming funds for Grant-in-Aid potentially limits the amount of funding available for asset management.

STRATEGIC PRIORITIES REFERENCE:

Providing financial resources to organizations in the community and the Valley is a means for the City to follow its strategic priorities as noted below.

We focus on organizational and governance excellence

- Support and encourage initiatives to improve efficiencies
- Recognize staff capacity is a finite resource and support staff training and development
- Communicate appropriately with our community in all decisions we make

We actively pursue vibrant economic development

- ▲ Continue to support Arts and Culture

We continually invest in our key relationships

- Consider effective ways to engage with and partner for the health and safety of the community

- **AREA OF CONTROL:** The policy, works and programming matters that fall within Council's jurisdictional authority to act
- ▲ **AREA OF INFLUENCE:** Matters that fall within shared or agreed jurisdiction between Council and another government or party
- **AREA OF CONCERN:** Matters of interest that are outside Council's jurisdictional authority to act

OFFICIAL COMMUNITY PLAN REFERENCE:

N/A

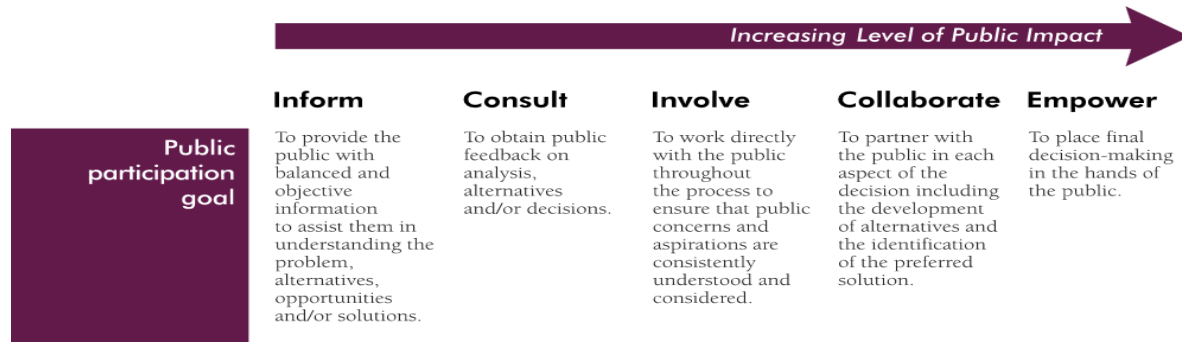
REGIONAL GROWTH STRATEGY REFERENCE:

N/A

CITIZEN/PUBLIC ENGAGEMENT:

Staff would **inform** the public based on the IAP2 Spectrum of Public Participation:

http://c.ymcdn.com/sites/www.iap2.org/resource/resmgr/imported/IAP2%20Spectrum_vertical.pdf

**OPTIONS:**

OPTION 1: That Council approve the Provision of Grant-in-Aid and Other Forms of Financial Support policy 1850.00.04 as presented; and

That staff be directed to update the City website and advertise for the 2020 Grant-in-aid applications as soon as possible; and

That staff be directed to pursue the "Flow-Through Funds" opportunity with the Comox Valley Community Foundation for the 2021 grant year.

OPTION 2: That Council approve the Provision of Grant-in-Aid and Other Forms of Financial Support policy 1850.00.04 as presented; and

That staff be directed to update the City website and advertise for the 2020 Grant-in-aid applications as soon as possible.

OPTION 3: That Council direct staff to discontinue the Grant-in-Aid program starting in 2020.

Prepared by:

Jennifer Nelson, CPA, CGA
Director of Financial Services

Attachments:

1. Draft Revised Grant-in-Aid and Other Forms of Financial Support Policy 1850.00.04
2. 2019-2023 Draft Proposed Schedule of Annual Gaming Funds Distribution
3. CVCF Flow-Through Funds Policy
4. CVCF Administration Fees Policy
5. Summary of Approved 2019 Grant-in-Aid Recipients and Impact

City of Courtenay**Policy**

Page 1 of 4

Section: 5 - Finance	Policy # 1850.00.04
Subject: Provision of Grant-in-Aid and other Forms of Financial Support	Revision # R-1

PURPOSE:

The purpose of this policy is for Council to provide criteria to identify the appropriateness and suitability of applications from organizations requesting Grants-in-Aid and other forms of financial support from the City of Courtenay. Council decisions with respect to the provision of these forms of support will be made after carefully reviewing all applications and in conjunction with annual budgetary planning.

POLICY:

The City has limited financial resources available for the provision of Grants-in-Aid or other forms of financial support to special interest groups. In order to be consistent and fair to all applicants, the following criteria must be met:

1. **Entity must complete the Application and provide correspondence to City Council:**
 - a. identifying who they are and whether they are a “for-profit” or “not-for-profit” organization,
 - b. what special interest they represent and a demonstrated financial need,
 - c. how much grant-in-aid or other financial commitments from the City they are requesting,
 - d. describe what project the resources will be used for,
 - e. describe how the project will benefit the community of the City of Courtenay and the greater Comox Valley region,
 - f. provide the project business case in terms of confirmation of need and demand, project sustainability, capital budget plan and operating budget plan if applicable, *(exclude if request is below \$10,000)*,
 - g. provide the organization’s audited financial statements for the past three years, *(provide prior year financial information if request is below \$10,000)*,
 - h. identify projects in the Comox Valley they have successfully completed, *(exclude if request is below \$10,000)*,
 - i. identify whether they are receiving or soliciting any other form of supplementary City funding, subsidy or fee reductions relative to the application;
 - j. identify other requests or receipt of funding from other organizations and Comox Valley local governments; and,
 - k. identify what City support they have received in the past five years and how it has been used.

AUTHORIZATION:	DATE:
-----------------------	--------------

Section: 5 - Finance	Policy # 1850.00.04
Subject: Provision of Grant-in-Aid and other Forms of Financial Support	Revision # R-1

2. Organizations must be based in the City of Courtenay. Funding is **not** available for individuals.
3. Organizations must identify and provide proof of supplementary funding payments or agreements from external sources supporting their initiative. Provincial and Federal funding agreements or correspondence identifying dollar amounts must be provided for Council information.
4. A Council resolution must authorize and determine the grant in aid payment or any other financial commitment from the City.
5. Grants-in-Aid and other commitments must be used for the purpose intended. City resources cannot be used to provide any type of assistance to other organization(s) working in tandem with the applicant.
6. Payments will only be issued upon direction provided by the Chief Administrative Officer or Director of Finance.
7. Each Grant-in-Aid payment will not exceed \$7,500.
8. **Gaming Funds will be the primary funding source for all monetary commitments to organizations or entities requesting assistance.**
9. Grants or other City resources cannot be used for illegal purposes or anything disallowed by the Community Charter.
10. Applicants must publicly acknowledge the City of Courtenay's contribution.
11. Applications must be submitted by **January 31st**, to the Director of Finance using the prescribed application form. The Director will review the applications for completeness and arrange contact with applicants for additional information as necessary.

AUTHORIZATION:	DATE:
-----------------------	--------------

Section: 5 - Finance	Policy # 1850.00.04
Subject: Provision of Grant-in-Aid and other Forms of Financial Support	Revision # R-1

12. The following criteria will be considered to be eligible for a Grant-in-Aid:

- i. Must benefit the entire community (all ages and groups)
- ii. The request is the only financial or in-kind support from the City
- iii. Other sources of funding have been applied for
- iv. The organization is financially sustainable

13. The Director of Finance will present a summary report of the applications, relative to the eligibility criteria, to Council and arrange for delegations to Council as necessary.

14. Within one year of the date of receipt of the grant, entities must provide an independent reporting of how the grant was utilized and the outcomes of the dollars received.

15. Grants-in-Aid shall be considered on a year-to-year basis and continuing support should not be anticipated.

SCOPE:

This policy applies to all grant-in-aid and financial requests submitted to the City of Courtenay. Authority for, and restrictions on the provision of, any form of assistance is provided under The Community Charter, Sections 8(1), 24 and 25. Preference will be given to organizations who can demonstrate a request that promotes the City's strategic priorities as identified in the Strategic Priorities found on the City's webpage.

RELATED DOCUMENTS:

RESPONSIBILITY:

City of Courtenay council members are responsible for adopting policies that manage the financial resources of the community. These policies must recognize the budgetary demands of City operations as a whole and be responsive to public perceptions and constraints. There is a limited sum of tax dollars and external revenue sources available for grants to organizations.

The Chief Administrative Officer or Director of Finance has responsibility for processing all payments.

AUTHORIZATION:	DATE:
-----------------------	--------------

Section: 5 - Finance	Policy # 1850.00.04
Subject: Provision of Grant-in-Aid and other Forms of Financial Support	Revision # R-1

REVIEW DATE:

This policy has an intended life of 20 years, or less dependent on the discretion of Council of-the-day.

DRAFT

AUTHORIZATION:	DATE:
-----------------------	--------------

City of Courtenay

2020 - 2023 PROPOSED Schedule of Annual Gaming Funds Distribution

DRAFT

Gaming Funds Balance, December 31, 2018	\$ 1,808,181
--	--------------

FINANCE SELECT COMMITTEE PREFERRED OPTION

Distribution: Major Categories		2019 Approved	2020 Proposed	2021 Proposed	2022 Proposed	2023 Proposed
Estimated Annual Funds Available		1,000,000	1,000,000	1,000,000	1,000,000	1,000,000
Support Downtown Arts and Culture	Annual Grants:					
	CV Art Gallery	65,000	65,000	65,000	65,000	65,000
	Ctny & Dist Historical Society	50,000	50,000	50,000	50,000	50,000
	Sid Williams Theatre Society	105,000	105,000	105,000	105,000	105,000
	Downtown cultural events	5,000	5,000	5,000	5,000	5,000
	Sid Theatre, Art Gallery and Museum Strategic planning (2018 carry forward)	21,000				
		246,000	225,000	225,000	225,000	225,000
Council Initiatives & Projects	Purple ribbon Campaign	3,500	3,500	3,500	3,500	3,500
	Feb 19, 2019 Resolution - LUSH Community Garden Annual Grant	10,000	10,000	10,000	10,000	10,000
	Nov 19, 2018 Resolution - Heritage Refurbish Clocks (2018 carry forward)	25,000				
	July 2, 2019 Resolution - Down Town Event Traffic Control	15,000				
	Annual Grants-in-Aid (Reduction per Finance Select Committee Recommendation)	105,650	50,000	50,000	50,000	50,000
	Annual Grants-in-Aid (Management Fee to Comox Valley Community Foundation)			2,500	2,500	2,500
	Other Council Initiatives/Projects - (Increase and amalgamate Social/Green/Council Initiatives)	25,850	75,000	75,000	75,000	75,000
		185,000	138,500	141,000	141,000	141,000
Public Safety / Security	RCMP Contract Funding	405,000	405,000	405,000	405,000	405,000
Social / Societal Initiatives	Removed Annual \$50K allocation					
	April 15, 2019 St. Georges United Church Kitchen Renovation	25,000				
	Jan7, 2019 Resolution CV Coalition to end Homelessness Delegation Request	35,000				
		60,000	-	-	-	-
Infrastructure Works	Annual Provision to Infrastructure Reserve	100,000	100,000	100,000	100,000	100,000
	Infrastructure Levy Reduction (1%)	220,800	220,000	220,000	220,000	220,000
		320,800	320,000	320,000	320,000	320,000
Green Capital Projects / Innovation	Removed Annual \$50K allocation	50,000				
	Electric Charging Stations - Committed 2019-2023 Fin Plan		175,000			
		50,000	175,000	-	-	-
Total Annual Distribution		1,266,800	1,263,500	1,091,000	1,091,000	1,091,000
Projected Gaming Fund Balance	\$ 1,808,181	1,541,381	1,277,881	1,186,881	1,095,881	1,004,881

POLICY: Flow-Through Funds		NUMBER: 2.3	PAGES: 2
SUBJECT: Financial Management Policies			
APPROVED: March 2019	REVISED:	SUBJECT TO REVIEW: Annually	

Flow-through funds are non-endowed donations where the principal is distributed to one or more charitable beneficiaries.

RATIONALE

While the Foundation's primary focus is on endowment funding, flow-through donations can be used to increase the distributions to charitable causes made by the CVCF annually. Several situations may give rise to flow-through funding:

- i. Where the Foundation is already holding an endowed fund. a donor (or other person) who wishes to channel some additional charitable funding through the Foundation in order to the annual distribution arising from such fund. Such a "top up" is limited to a maximum of \$1000 annually.
- ii. Where there is a desire on the part of the Foundation to provide a special service. For example, an individual may have made a planned endowed gift in a will, or through life insurance, and wish to contribute annually to one or more causes on a pure flow-through basis. A minimum annual contribution should be \$5000.
- iii. Where there is an individual or group committed to raising funds for one or more causes to be funded through the Foundation as the charitable tax issuing entity. A minimum contribution should be \$5000.
- iv. Where there is a significant opportunity to profile support for either the Foundation (as the intermediary) or designated beneficiaries. A minimum contribution should be \$5000.
- v. Where there is a new community or broader partnership opportunity that ultimately benefits the Foundation. A minimum contribution should be \$5000.
- vi. Online Top Up of Grant Requests

* Flow through funds will be accepted on a case by case basis. In reviewing the desirability of accepting a flow-through fund, consideration will be given to the number of beneficiaries, the total amount of funding to be flowed through the Foundation, the amount of administration required, the philanthropic intent of the donor, the desire to provide such a service to the particular donor and the opportunity for future gifts. Care should be taken to ensure that advantage is not being taken of the Foundation, nor precedent set, in agreeing to such arrangements. In all circumstances, every attempt should be made to have the donor make a commitment to the Foundation by making a meaningful gift to a permanent endowment.

GIFT AMOUNT

In accepting funds to be flowed through the Foundation, care must be taken to ensure that the size and timing of the gift will not adversely affect the Foundation's disbursement quota.

AGREEMENT

Where possible, a written agreement between the donor and the Foundation will be executed, setting out the terms and use of the gift. However, when the gift is received unexpectedly without benefit of prior discussion or memorandum of understanding with the donor, the Foundation will be guided by any terms set out by the donor in a bequest, memorandum or letter and in accordance with its governing instruments.

POLICY: Administration Fees	NUMBER: 2.2	PAGES: 1
SUBJECT: Financial Management Policies		
APPROVED: July 2017	REVISED: March 2019	SUBJECT TO REVIEW: Annually

Foundations cover their operating costs with their administration fees and with donations specifically towards operations (in-kind and cash) and/or special fundraising events. It is important that these fees be reviewed annually due to their potentially significant impact on the operating budget.

POLICY:

- i. **Fees for endowed funds:** A fee of 0.50% of invested funds annually for agency funds, and a fee of 1% for all other funds, prorated on a monthly basis in the year of the initial donation.
- ii. **Fees on gifts to endowed funds:** There are no fees on gifts to endowed funds.
- iii. **Fees for top-up flow-through fund gifts:** No fee on gifts aimed to "top up" an annual distribution made from an existing endowed fund. Such gifts are limited to \$1000 annually.
- iv. **Fees for pure flow-through fund gifts:** Such gifts are subject to a minimum of \$5000. Fees are on a sliding scale from 5% for a \$5000 gift to 2% for a \$1 million gift as follows:
 - * 5% on first \$100,000
 - 4% on next \$400,000
 - 3% on next \$500,000
 - 2% on additional amounts
- v. When extraordinary services of the Foundation are required in connection with a gift, the Foundation will be compensated by separate agreement.

List of Grant-In-Aid Applicants for 2019

Category	Name of Organization / Society	Purpose	Grant Requested for 2019	Grant approved by Council for 2018 *	Number of criterias fulfilled (0 - 4)	Recommended Grant Amount (\$15,000 cap)	Recommended Grant Amount (no cap)	Potential Impact with \$50k and \$7,500 cap
Downtown Arts & Culture	Comox Valley Multicultural & Immigrant Support Society	\$1,200 Lunar Fest Celebration, \$1,500 CV Multicultural Fest, \$800 Children after school program and \$300 Family sport program	\$ 3,800	\$ 3,500	4	\$ 3,800	\$ 3,800	\$ 1,700
	Comox Valley Arts	\$20,000 - Operations, \$33,200 - General Programming	\$ 53,200	\$ 13,000	4	\$ 15,000	\$ 53,200	\$ 6,800
	Comox Valley Pipe Band Society (CVPBS)	Classroom rental (SD71) - Sept to June - 2 nights/week. In-kind donation for facility rental to practice at would be considered.	\$ 1,000	\$ -	4	\$ 1,000	\$ 1,000	\$ 500
	Downtown Courtenay Business Improvement Association	\$5,000 to support community events (Moonlight Magic, Market Day and Summer Night Markets); \$10,000 for Historical Art Installation Project	\$ 15,000	\$ -	3	\$ 15,000	\$ 15,000	\$ 6,800
	Western Canada Pulp and Paper Curling Bonspiel	2019 Pulp and Paper Annual Curling Bonspiel to be held at Comox Valley Curling Club March 7 to 10, 2019	\$ 2,000	\$ -	3	\$ 2,000	\$ 2,000	\$ 1,000
	The Alberni Project Society	\$3,000 Summer Exhibit 'Graphic Art in Time of War' or 'Hide & Seek: Espionage & The Cold War' and \$500 April 2019 Anzac Day (at HMCS Quadra in Comox)	\$ 3,500	\$ -	3	\$ 3,500	\$ 3,500	\$ 1,500
	Downtown Arts & Culture Total		\$ 78,500	\$ 16,500	4	\$ 40,300	\$ 78,500	\$ 18,300
Green Capital Projects/Innovations	Comox Valley Land Trust	Funding for CV Conservation Partnership Program Coordinator	\$ 8,000	\$ 4,800	4	\$ 8,000	\$ 8,000	\$ 3,600
	Comox Valley Nature	Wetlands Restoration Projects : control & replacement of invasive plants	\$ 3,000	\$ 2,900	4	\$ 3,000	\$ 3,000	\$ 1,400
	Morrison Creek Streamkeepers	\$1,850 Interpretive Signs at Puntledge Park, \$700 Volunteer equipment / support for invasive plant removal and native plant planting	\$ 2,550	\$ -	3	\$ 2,550	\$ 2,550	\$ 1,100
	Youth and Ecological Restoration Program (YER)	Assistance with the YER video (promotional material) and YER website upgrade	\$ 2,000	\$ -	3	\$ 2,000	\$ 2,000	\$ 1,000
	Comox Valley Project Watershed Society	Awareness campaign to inform public of emerging issue with Canada goose increasing population, which threatens the health of local habitat	\$ 2,500	\$ 4,500	3	\$ 2,500	\$ 2,500	\$ 1,100
	Courtenay Lawn Bowling Club	Replacement of 18 rotting wooden benches	\$ 15,000	\$ -	1	\$ -	\$ -	\$ -
	Green Capital Projects/Innovations Total		\$ 33,050	\$ 12,200	3	\$ 18,050	\$ 18,050	\$ 8,200
Social/Societal Initiatives	Comox Valley Cycling Coalition (CVCCo)	\$1,200 to develop, produce & distribute a cycling information card and \$1,600 promotion on social media	\$ 2,800	\$ -	4	\$ 2,800	\$ 2,800	\$ 1,200
	Indigenous Women's Sharing Society	To support facility administration costs for ongoing non-funded admin activities	\$ 5,000	\$ 1,900	3	\$ 5,000	\$ 5,000	\$ 2,200
	LUSH Valley Food Action Society	Coordination of the Community Garden: \$6,000 for Program coordinator, \$1,000 material, \$500 promo and \$500 admin costs	\$ 8,000	\$ 5,100	2	\$ 8,000	\$ 8,000	\$ 3,600
	Comox Valley Transition Society (CVTS)	Assistance to cover remaining 60% of their 2019 property tax (CVTS is granted a 40% permissive tax exemption)	\$ 6,000	\$ 4,200	2	\$ 6,000	\$ 6,000	\$ 2,700
	The John Howard Society of North Island	KidStart one on one mentoring program	\$ 7,500	\$ -	2	\$ 7,500	\$ 7,500	\$ 3,400
	Comox Valley Transition Society (CVTS) on behalf of Comox Valley Coalition to End Homelessness (CVCEH)	Funding for continued programming	\$ 8,000	\$ 5,900	2	\$ 8,000	\$ 8,000	\$ 3,600
	Habitat for Humanity Vancouver Island North Society	Funds to go toward Lake Trail Road project	\$ 30,000	\$ 10,000	2	\$ 15,000	\$ 30,000	\$ 6,800
	Everybody Deserves a Smile Community Projects Society	1,100 hand painted care packages for the homeless in the Comox Valley & other communities across the Island and beyond.	\$ 5,000	\$ -	1	\$ -	\$ -	\$ -
	Royal Canadian Legion Branch #17	To replace upper lounge windows and frames in the local Branch	\$ 10,774	\$ -	1	\$ -	\$ -	\$ -
	Social/Societal Initiatives Total		\$ 83,074	\$ 27,100	2	\$ 52,300	\$ 67,300	\$ 23,500
Grand Total			\$ 194,624	\$ 55,800	3	\$ 110,650	\$ 163,850	\$ 50,000

* In 2018, a total of \$84,000 has been granted to 14 organizations. Not all recipients reapplied for 2019



THE CORPORATION OF THE CITY OF COURTENAY

STAFF REPORT

To: Council
From: Chief Administrative Officer
Subject: Cultural Service Report

File No.: 07800-20 Cultural Service Report
Date: November 25, 2019

PURPOSE:

The purpose of this report is for Council to receive the City of Courtenay Cultural Service Report, and consider the recommendations as part of the annual budget and Five Year Financial Plan.

CAO RECOMMENDATIONS:

That based on the November 25, staff report “**Cultural Service Report**”, Council adopt OPTION 1 and direct staff to consider the strategies and recommendations contained in the report as part of the annual budget and Five Year Financial Plan process.

Respectfully submitted,

David Allen, BES, CLGEM, SCLGM
Chief Administrative Officer

BACKGROUND:

The City of Courtenay offers cultural services through non-profit cultural partners rather than the direct delivery of services through City staff. Since 2000, the City’s core cultural partners have occupied City buildings under a licence of occupation with funds to support service deliverables as outlined in each agreement. This includes the following organizations: the Sid Williams Theatre Society (SWTS), the Comox Valley Art Gallery Society (CVAGS), and the Courtenay and District Historical Society (CDHS).

Comox Valley Arts (CVA) is not a current core cultural service provider as they do not have a formal management agreement or contract with the City other than an office lease. The City has historically partnered with CVA on select City mural projects and provided partial operational and programming funding through the Grant in Aid process.

In an effort to benchmark service levels, staff engaged a consultant to:

1. document the core cultural service each cultural partner provides,
2. review the operational and financial sustainability of each core partner (CVA excluded),
3. review the City’s role in cultural development, and

4. provide short term, long term, and ongoing recommendations for the City to move forward in its Cultural service planning

In the fall of 2018 staff hired a consultant to undertake a cultural service review for the City. This included:

- a review of the existing relevant City documents (Strategic Priorities, Licences of Occupation, Management Agreements and Official Community Plan),
- interviews with key stakeholders (City Staff, cultural partners, Council workshop and the CVRD),
- the benchmarking of cultural services including a comparative review of other relevant municipal practices, and a review of core cultural service partner financials
- documentation of the consultant's findings including short term (Year 1), medium term (Year 2-3) and ongoing strategies.

Comox Valley Arts (CVA) was also included in the study due to the organization's vital role in cultural service delivery in the community.

DISCUSSION:

Key Strategies and Considerations:

The following key findings were determined by the Cultural Service Report with further strategies detailed in the Short Term and Medium Term and Ongoing section of the report:

1. The cultural service partners have a limited capacity to sustain an appropriate service level with the current funding available.
2. The City partner with the Comox Valley Regional District in developing a funding model to support the regional role each cultural partner plays in the Comox Valley.
3. Provide sustainable funding (multi-year core funding) support to the CVA through a fee for service agreement in return for meeting the objective of providing arts and cultural promotion for the core cultural partners and the region; including professional development, training and resource support. Explore funding resource through hotel room tax.
4. Provide sustainable funding (multi-year core funding) to support to CVAGS to meet the objective of providing public education and outreach in the community.
5. Support strategic business planning for all four cultural groups by partially funding strategic planning expenses every 3-5 years.
6. Assemble an Inter-municipal Cultural Working Group to initiate the cultural planning process and development of a cultural master plan.
7. Collaborate with cultural partners to explore options for additional space needs, developing facility plans and support applications to federal and provincial cultural space grants.

FINANCIAL IMPLICATIONS:

The financial implications of the recommendations outlined in the Cultural Services Report will be identified in the 2020 Five Year Financial Plan.

ADMINISTRATIVE IMPLICATIONS:

The Recreation and Cultural Services Department has managed the development of this document. RCS Department will implement the strategies and recommendations identified in the report through the Recreation and Cultural Services Business Administration Division.

This includes:

- Amending the management agreements with the existing cultural partners to reflect the City and respective cultural partners' roles.
- Negotiate and create a fee for service or multi-year funding agreement with the CVAC.
- Establishing an inter-municipal cultural working group to initiate the cultural planning process and commit to meetings and stakeholder engagement on a regular basis.
- Partner with the CVRD in establishing a regional arts and culture funding model.

ASSET MANAGEMENT IMPLICATIONS:

To be determined as part of the annual Five Year Financial Plan process.

STRATEGIC PRIORITIES REFERENCE:

The following strategic priorities will apply:

We focus on organizational and governance excellence

- Responsibly provide services at levels which the people we serve are willing to pay

We proactively plan and invest in our natural and built environment

- Focus on asset management for sustainable service delivery
- ▲ Look for regional infrastructure solutions for shared services
- ▲ Continue to support Arts and Culture
- ▲ Support social, economic and environmental sustainability solutions

We continually invest in our key relationships

- Value and recognize the importance of our volunteers
- Consider effective ways to engage with and partner for the health and safety of the community

● **AREA OF CONTROL:** The policy, works and programming matters that fall within Council's jurisdictional authority to act

▲ **AREA OF INFLUENCE:** Matters that fall within shared or agreed jurisdiction between Council and another government or party

■ **AREA OF CONCERN:** Matters of interest that are outside Council's jurisdictional authority to act

OFFICIAL COMMUNITY PLAN REFERENCE:

The OCP identifies the following vision:

The vision for the City of Courtenay is for a City that is unique and different from other communities. It is to become the most liveable community in the province. It can be expressed as having:

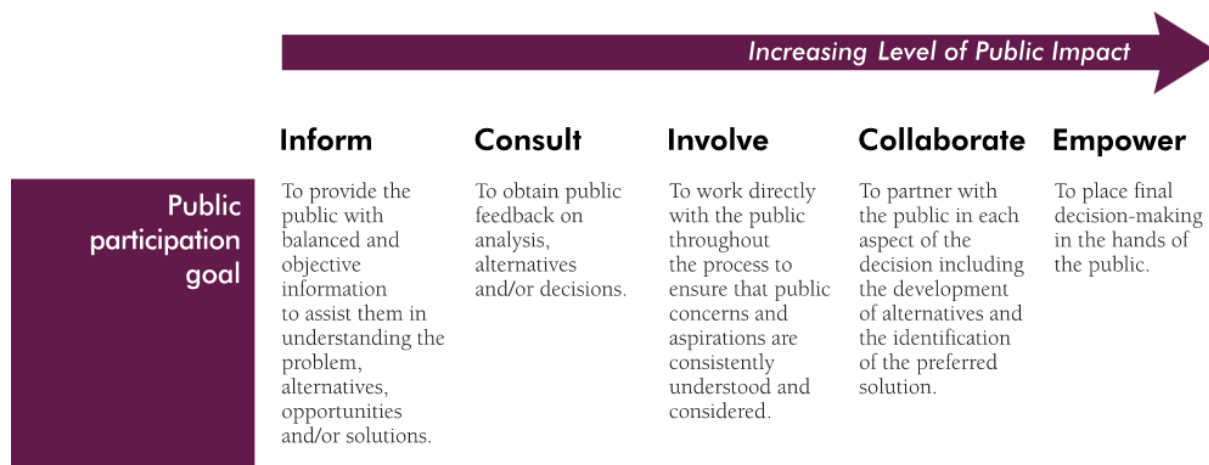
- *an inclusive, open and caring community*
- *a reputation as the premier regional centre for arts and culture*
- *balance and ability to lead growth and the provision of services*
- *a role to be the centre of commerce for the Comox Valley*
- *commitment to serve youth and seniors*

REGIONAL GROWTH STRATEGY REFERENCE:

No specific reference

CITIZEN/PUBLIC ENGAGEMENT:

Staff would inform the public based on the IAP2 Spectrum of Public Participation:



OPTIONS:

1. Council adopt OPTION 1 and direct staff to consider the strategies and recommendations contained in the report as part of the annual budget and Five Year Financial Plan process.
2. Council refer this item back to staff for further consideration or consultation.
3. Council receive the report for information, and bring forward for discussion at a future Committee of the Whole meeting.

Prepared by:

A handwritten signature in black ink, appearing to read 'DSE', is positioned below the 'Prepared by:' text.

Dave Snider *BCSLA*

Director of Recreation and Cultural Services

Attachments:

1. City of Courtenay Cultural Services Report PH Fall 2019

CITY OF COURTENAY

Cultural Services Report

Fall 2019

PREPARED BY:

 **PATRICIA
HUNTSMAN**
CULTURE + COMMUNICATION

IN PARTNERSHIP WITH:

 **Nordicity**
Cultural Planning | Policy Development | Impact Analysis



CONTENTS

1. Introduction..... 5

1.1 About the Study

1.2 About the Team

1.3 Methodological Approach

2. Context for Cultural Partnerships and Development.....11

2.1 City and Regional Levels

2.2 Current Trends and Practices

3. Cultural Partner Profiles.....28

3.1 Comox Valley Art Gallery: History, Relationship with the City, Goals and Objectives, Organization Structure, Challenges and Constraints, Partners and Programming.

3.2 Courtenay and District Museum: History, Relationship with the City, Goals and Objectives, Organization Structure, Challenges and Constraints, Partners and Programming.

3.3 Sid Williams Civic Theatre: History, Relationship with the City, Goals and Objectives, Organization Structure, Challenges and Constraints, Partners and Programming.

3.4 Comox Valley Community Arts Council : History, Relationship with the City, Goals and Objectives, Organization Structure, Challenges and Constraints, Partners and Programming.

4. Cross-Jurisdictional Analysis.....40

Case Study 1: The City of Revelstoke, BC

Case Study 2: The City of Maple Ridge, BC

Case Study 3: The Town of Aurora, Ont.

Case Study 4: The City of Nelson, BC

Case Study 5: The City of Sechelt, BC

Case Study 6: The City of Salmon Arm, BC

5. Cultural Partners: Management and Performance Review.....45

5.1 Funding Comparisons: Current Service Levels (all)

5.2 Operations, Financial Management; and Considerations

6. Considerations and Recommendations.....57

7. Moving Forward.....64

APPENDIX A.....66

APPENDIX B.....69

Executive Summary

The Cultural Services Report offers an analysis of the four key organizations crucial to the delivery and success of Courtenay's arts and cultural development.

Courtenay is an innovative, vibrant, and growing city that offers a range of lifestyle, and cultural employment possibilities. A cultural mapping project conducted in late 2016 estimated that between 4,000-6,000 cultural workers reside in the Comox Valley reflecting a density of cultural workers. A recent Vital Signs report (2018) noted **1,010** people work in the arts, culture, and film industry,¹ however it is unclear how individuals self-identified between primary and sub domains within the cultural sector.

Following a review of Courtenay's key cultural assets – the **Comox Valley Art Gallery, the Courtenay & District Museum, the Sid Williams Civic Theatre, and the Comox Valley Community Arts Council**²– it's determined that *all four have a limited capacity to sustainably deliver their services with the current funding available.*

¹ Comox-Valley 2018 Vital Signs report

The economic impact of these organizations is promising and could be enhanced. Based on 2017 figures, the gallery, museum and theatre generated a combined revenue of nearly \$2,000,000.

In order to address the City's roll with its cultural providers, the following **key strategies and considerations are recommended** for each of the four organizations evaluated:

- **Sid Williams Theatre:** The City could consider partnering with the Comox Valley Regional District to diversify revenue over a three-year period and develop a funding formula that reflects the Theatre's regional role as a cultural provider. The same is true for the other cultural partners herein though to a lesser extent due to the wider engagement of performing arts.
- **Comox Valley Community Arts Council (Comox Valley Arts):** The Arts Council would benefit from a fee for service agreement and serving as a third-party marketer to oversee arts and cultural promotion throughout the

² Comox Valley Community Arts Council was not included in the financial analysis as they are not a direct client of the City of Courtenay (do not have a fee for service or operating agreement with the City at this time).

region--- leveraging the existing marketing they are successfully carrying out. CVA's services could continue to focus on creative skills and capacity building by offering professional development, training, and resource support to those that work in arts and cultural sector. It's recommended that funding support an additional 20 hours per week for an on-staff community coordinator on behalf of the City. They would also benefit from the provision of further office and programming space.

- **Comox Valley Art Gallery:** An increase in multi-year core funding from the City would enable the CVAG to meet the objective of providing public education and outreach in the community which is falling short of its potential at this time.
- **Courtenay & District Museum:** Leveraging the Museum's paleontology assets is a key strategic focus for the museum which will enhance cultural tourism in the area. Diversifying its revenue base and minimizing interest on loan payments could assist with the sustainability of the organization which is currently 44% City-contributed.

The following **general approaches** are also recommended for each of the organizations:

- **Marketing Investment:** Three of the cultural organizations in Courtenay are spending less than 5% of their expenditures on advertising or promotion, with the Comox Valley Art Gallery Society and the Courtenay and District Historical Society each spending only ~\$8,500 annually. Given that marketing efforts typically demonstrate a high ROI, it's recommended that Sid Williams Theatre Society, Art Gallery and Courtenay District Historical Society increase their marketing expenditures from current levels. All would benefit from Comox Valley Art's increased marketing role.
- **Maintaining Cultural Capital Assets:** It's key that the City continue to recognize its responsibility in maintaining cultural infrastructure and leveraging other government programs for support such as Provincial funding; the Federation of Canadian Municipalities; and the Canada Cultural Spaces Fund. Identifying and using non-traditional spaces for shop pop ups, and cultural amenity contributions via the developer approval process are all support-centered strategies worth considering for infrastructure maintenance.

- **Business Planning, Monitoring and Evaluation:** All four organizations would benefit from improved monitoring and evaluation especially related to ‘making the case’ for financial support. Ideas to incentivize this includes developing a cultural score card to evaluate performance, and City-provided partial funding every 3 – 5 years in its Operating Agreements to cover strategic planning expenses for its cultural partners.
- **Future Directions and Models:** There are several possibilities to consider as a strategy to better manage Courtenay’s arts and cultural resources.
 - The first approach is to develop an Inter-Municipal Working Group (staff representatives) that meet regularly with a view to carrying out a regional cultural planning process and to sponsor a community liaison. From there, the liaison (such as CVA) could assist in convening a community-led cultural roundtable reflecting the wider creative ecosystem of the Valley with a view to minimizing duplication, organizational overlap, and promote collaboration.
 - Another step would be to develop a regional grants program for arts organizations.
 - A further possibility is to centralize the earned-revenue capacity of cultural partners by examining the case for developing a (C3) community contribution company; the profits of which could benefit the four organizations.
- **Role of the City in Arts and Cultural Development:** The City has laid a foundation for cultural development, and has demonstrated its support of its cultural assets and the necessary evaluation. Carrying out a cultural plan is an essential next step through the Inter Municipal Working Group, to help guide investment and decision making over the next ten years.
- **Contextual BC Case Study Summary:** Included in this report is a case study summary of municipalities throughout the province that have successful partnerships with their cultural providers; those profiles offer a greater context and background for the above recommendations.

1. Introduction



1.1 About the Study

The City of Courtenay Recreation & Cultural Services Department commissioned Patricia Huntsman Culture + Communication in partnership with Nordicity to provide analysis of the business plans of the City's designated cultural organizations. This includes the Sid Williams Theatre Society, the Comox Valley Art Gallery Society, and the Courtenay and District Historical Society. While not a current designated cultural partner of the City, the Comox Valley and District Arts Council was also included in the analysis for the role they play in cultural service delivery.

The report specifically aims to:

1. Review the operations and financials of each cultural partner;
2. Determine what level of core services each cultural partner can provide in a sustainable manner;
3. Determine the optimal role of the City in cultural development; and,
4. Offer recommend directions for the future.

The scope of work included the following key components (described further in Section 3.1):

- A literature review;
- Interviews with City staff and cultural partners;
- Benchmarking of cultural services; and,
- Financial management and performance analysis.

Through these stages, recommendations were developed regarding the allocation of funding to the City's cultural partners, reporting relationships, organizational capacity, and the sustainability of planned service levels and are presented in Section 6.

1.2 About the Team

Patricia Huntsman Culture + Communication is a BC-based consultancy specializing in communications and cultural development. Patricia is a sought-after and respected voice at the forefront of culture-led economic and community development in Canada. She has more than 20 years-experience in leadership and senior management roles in the creative field.

Nordicity (www.nordicity.com) is a leading international consulting firm providing private and public-sector clients

with solutions for Economic Analysis, Strategy and Business, and Policy and Regulation. They take a focus on four priority sectors: arts, culture and heritage; digital and creative media; information and communication technologies (ICTs) and innovation; and, telecommunications and spectrum.

Nordicity was founded in 1979, acquired by PricewaterhouseCoopers (PwC) in 1997, and re-launched as an independent entity in 2002, coincident with the acquisition of PwC's consulting practice by IBM. Today, Nordicity serves clients across Canada and the world from four offices based in Toronto, Ottawa, Vancouver and London (UK).



1.3 Methodological Approach

The Project Team employed a four-phase methodology.



Phase 1 consisted of a document review which assessed two key streams of documents:

- Annual reports, strategic plans and other documents produced by the City’s cultural partners, so as to provide the Project Team with an understanding of the mandates and objectives of each partner organization.
- The Official Community Plan and documentation related to other municipal programs, policies and initiatives to allow the Project Team the ability to assess the services and activities of the cultural partners within the context of the City’s broader priorities.

Phase 2 encompassed the stakeholder engagement, which saw the Project Team engage in six interviews and a Council workshop. Interviewees included: City of Courtenay staff; and representatives from the following:

- The Comox Valley Art Gallery
- The Courtenay & District Museum
- The Sid Williams Civic Theatre

- The Comox Valley Community Arts Council
- The Comox Valley Regional District.

Interviews with City staff and cultural partners provided an understanding of constraints and challenges faced by the City in supporting the cultural partners, as well as potential opportunities and future directions for that support. To assist in evaluating performance and capturing the current and historical positions of each cultural partner, an organization assessment outlining key information to acquire was provided to the respective cultural partners in advance of the interview, along with a self-assessment diagnostic tool: the non-profit life-cycle³ which each organization completed. Samples of the organization assessment and non-profit life-cycles analysis are included in Appendix A of this report.

Following the data collection phases, the Project Team moved into **analysis (Phase 3)**, which saw the collation and synthesis of the information gathered in the document review and stakeholder engagement. The analysis included

³ Adapted for small-medium arts and culture organizations by Kathleen Speakman from Susan Kenny Stevens Non-Profit Lifecycles: Stage-based wisdom for non-profit capacity.

benchmarking cultural services, a comparative review of relevant practices, and a financial management and performance analysis.

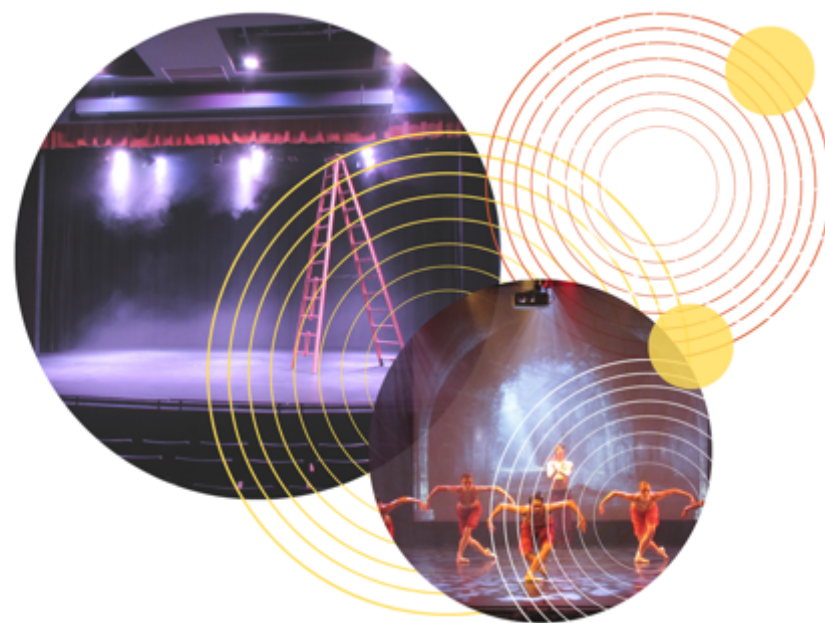
The **fourth phase** consisted of the Project Team developing the recommendations, and the complete report contained herein.



2. Context for Cultural Partnerships and Development

The following section provides a contextual backdrop by summarizing international, national, provincial, Indigenous, regional and local considerations that will shape arts and culture development in the Comox Valley. The following section can support communications to Council and the community and assist in furthering an understanding of sustainable creative ecology.

It offers a review and comparative analysis of global and Canadian best practices, industry trends and other driving forces in the external environment that in turn effect policy, assessment and planning. It also includes an internal assessment of key documents, policies, and plans and identifies current information gaps as well as policy linkages.



2.1 City and Regional Levels

Profile: City of Courtenay

Situated on the east coast of Vancouver Island within the traditional lands of the K'ómoks First Nation, the City of Courtenay (approximate population 26,599⁴) was founded in 1915 as an agricultural and fishing community. Today, Courtenay has grown to become the urban and cultural hub of the larger Comox Valley (approximate population 65,000) and is still the largest municipality in the region.

Courtenay is an innovative, vibrant and growing City that works to provide opportunities and excellent services making its community a great place to live, work and do business. With many beaches, hiking trails, rivers, and lakes; Mt. Washington Ski and Alpine Resort; and world class golfing, the Comox Valley is known for its many year-round recreation and sports opportunities.

Official Community Plan (OCP): A Blueprint for Courtenay

The OCP recognizes arts and culture through the following important ways:

- Consider arts and culture in the preparation of all City policies,
- Designate specific resources for the arts and culture,
- Play a role in providing physical infrastructure for arts and culture, including buildings, public spaces, and parks, support marketing efforts which include the arts and culture as a key attraction of the Comox Valley,
- Incorporate arts and culture, including public art, in urban design and planning,
- Provide leadership in building regional arts and culture strategies, involving municipalities, the Regional District, School District 71 and North Island College,
- Facilitate access to the arts and culture for all citizens, support youth as the next generation of artists, audience, organizers, and volunteers.

Demographics

The Courtenay Official Community Plan⁵ notes the following key demographic trends based on data cross-referenced with Stats Canada:

- An aging population due to a high number of retirees

⁴ <https://www.courtenay.ca/assets/City~Hall/Council/Agendas/2019/2019-01-21%20Parks%20and%20Recreation%20Master%20Plan%20DRAFT.pdf>

⁵ <https://www.courtenay.ca/assets/City~Hall/Council/Agendas/2019/2019-01-21%20Parks%20and%20Recreation%20Master%20Plan%20DRAFT.pdf>

- Lower medium income and a high number of people relying on income from pensions

Within BC, it's typical for 18.3% of people to be over the age of 65, as opposed to the current 26.1% average in Courtenay. To accommodate the influx of retirees, the City aims to continue to assess and report on resident's quality of life and ease of access. They also aim to collaborate on a civic youth strategy, and create an advisory committee to identify and advocate for the needs of youth in the community.

City of Courtenay – Population Change⁶

Age Profile	2011	2016
0 to 14 years	3,530 (14.5%)	3,660 (14.3%)
15 to 64 years	16,730 (69%)	15,265 (59.6%)
65+ years	5, 285 (21.8%)	6,675 (26.1%)

⁶ <https://www12.statcan.gc.ca/census-recensement/2016/dp-pd/prof/details/page.cfm?Lang=E&Geo1=CSD&Code1=5926010&Geo2=PR&Code2=59&Data=Count&SearchText=british%20columbia&SearchType=Begins&SearchPR=01&B1=All&TABID=1>

⁷ <https://www12.statcan.gc.ca/census-recensement/2016/dp-pd/prof/details/page.cfm?Lang=E&Geo1=CSD&Code1=5926010&Geo2=PR&Code2=59&Data=Count&SearchText=british%20columbia&SearchType=Begins&SearchPR=01&B1=All&TABID=1>

City of Courtenay – Demographic Change⁷

Location	2011	2016	%
Courtenay	24,216	26, 599	5.7

While a closer look at the adult population (15 to 64 years) reveals an upward trend, cultural partners, City Council and Staff, and the community-at-large⁸ agree that a shift in the community's profile has occurred which might not be reflected in the latest Census population data. The shift comprises the attraction of many young families to the region, and as referenced through interviews with the cultural partners, is being reflected in their respective programming in response to changing demographics and being family-friendly arts and cultural organizations. The shift also sees many creative workers migrating to the area

⁸ Based on input received for this report from interviews, meetings with Staff, Council and cultural partners.

as well as those attracted to recreation assets, many of whom have an expectation of cultural amenities within the rural setting, especially around culinary arts.

Local Government Administration: An Asset-Management Lens

Over the past five years the City of Courtenay has adopted an asset management framework for sustainable service delivery.

Local governments are responsible for a wide range of assets supporting core service delivery (roads, water and sewer systems) which also includes cultural capital assets.

Cultural capital assets include the infrastructure that supports arts and culture such as theatres, museums, art galleries and public art spaces and public art.

The goal of asset management is achieving “sustainable service delivery”: ensuring that current community services are delivered in a socially, economically, and environmentally responsible manner that does not compromise the ability of future generations to meet their own needs.

Sound Asset Management practices help minimize risks and long-term costs. This approach has extended into the management agreements with the local cultural partners profiled below, and appears to be taken into consideration in maintaining cultural infrastructure. In earlier years, funding allocations lacked parameters or guidelines and expected outcomes. More recently, Recreation and Cultural Services staff have worked on agreements with cultural partners in order to provide clearer role definitions between the parties.

Cultural Planning Linkages: Past and Present Developments

In addition to the OCP, the recently released 2019-2022 Strategic Priorities for the City of Courtenay identifies:

“‘continuing to support arts and culture’ within the third priority of ‘actively pursue vibrant economic development.’”

This is an important step in cultural development for the City as it recognizes the strategic role of arts and culture beyond programming, and its integration with other areas of community planning, building from Courtenay’s foundational level of arts programming and provision of cultural facilities and assets.

Previous OCP: Culture, Heritage and the Arts

Previous planning initiatives and staff reports have cited the strategies and actions below which have helped to shape and evolve Courtenay's cultural development. While in some cases these initiatives may not have been fully completed, they reflect the intentions and characterization of Courtenay as a positive environment for arts and culture development:

- Enhance Courtenay's reputation as the premier regional centre for arts and culture;
- Adopt and implement the recently-prepared Arts and Culture Policy, which offers a series of specific actions for the City to take (see Section 4.8);⁹
- Demonstrate how your community values, preserves and manages, for the benefit of the community, its cultural heritage and its built and natural, historical and national heritage.

It should be noted that in 2003, an Arts and Culture Policy draft was endorsed by the Council of the day but never

⁹ Although the OCP references an Arts and Cultural Policy, Council has yet to officially approve and adopt one.

formalized or implemented. Going forward, should the City choose to advance with a regional or local area cultural master plan, a cultural policy would form the foundation to provide strategic directions and guidelines for decision-making and investment.

Culture and Recreation: City and Regional Levels

To promote social equity and community engagement the City recognizes that robust recreation programs, and arts and cultural programming is vital to the health and involvement of the community.

Survey data cited in the Parks and Recreation Master Plan¹⁰ identified that *farmers markets and festivals or special events in a park* are leading cultural activities within the Courtenay (74% of those survey attend a farmer's market, and 67% attend a festival or special event in a park). For Courtenay to be age-resilient in its approach to planning, accessibility and affordability are two key considerations for cultural events programming.

¹⁰ <https://www.courtenay.ca/assets/City~Hall/Council/Agendas/2019/2019-01-21%20Parks%20and%20Recreation%20Master%20Plan%20DRAFT.pdf>

When the Comox-Valley 2018 Vital Signs report surveyed over 1,000 diverse residents they determined the following top 5 commonly accessed amenities:

1. Local beaches
2. CVRD Trails
3. Provincial Parks
4. Municipal Parks & Playgrounds
5. Sid Williams Theatre

City Investment in Arts and Culture

The City recognizes arts and culture as essential to community health and strength. They take a focus on funding major capital investments and ongoing support of arts and cultural activities. Currently, as noted in the OCP ¹¹, the City of Courtenay offers financial and in-kind support through the following:

- Direct operating grants
- Providing facility space, repairs and maintenance

- Licence to occupy and management agreements between City-owned buildings and arts and cultural organizations

The City is also moving towards current local government cultural planning practice of taking a creative ecosystems approach to its cultural development which is marked by a shift from a programmatic lens to an integrated and strategic lens in many aspects of municipal planning (e.g. tourism, economic development, local area plans, wellness plans, etc.).

Cultural Services as Connector



¹¹

https://www.courtenay.ca/assets/Departments/Development~Services/Bylaw_2387_OCP.pdf.pdf

Source: Image courtesy of the City of Kingston Cultural Services Department.

As such, an integrated municipal cultural service portfolio at both strategic and service delivery levels will see many ‘touch-points’ on culture both within City Hall and out in the community.¹²

Cultural Infrastructure and Place-Making: Key components of Cultural Development

An important aspect of cultural development is place-making, the reflection of a community’s identity in its visual public realm and the activation of public spaces. The majority of commercial development has not been downtown however, the urban core of Courtenay has experienced a renewal of many cultural facilities that are all within walking distance of one another leading to an evolving cultural precinct or district.

It’s important to reflect that ‘place’ weaves in the naming of spaces and language considerations in keeping with Truth and Reconciliation and the decolonization of spaces in the public realm. The integration of Indigenous public art work

in the form of totems within downtown is in keeping with this important recognition of place.

The Official Community Plan¹³ notes that the City intends to make architectural aesthetics and place-making a key focus in their development planning, with sensitivity to their unique sense of place, history and character. This centers around ‘*ensuring the highest level of aesthetic design*’ through the following approaches:

- Define or redefine Courtenay’s visual identity,
- Establish a clear idea of what image Courtenay wants visitors to take home with them,
- An approach to buildings that expresses a feeling of civic pride,
- Ensuring that all development happens with care, in accord with locally-prepared standards,
- Require blank walls of large buildings to be detailed or landscaped.

¹³

https://www.courtenay.ca/assets/Departments/Development~Services/Bylaw_2387_OCP.pdf.pdf

Past downtown cultural facility renovations include:

- The Sid Williams Civic Theatre
- Courtenay & District Museum
- The Courtenay Library
- Jubilee Square – open space and parking lot

Previous cultural infrastructure plans saw the completion of:

- The Old Fire Hall conversion to an Art Gallery – Duncan and 6th
- The City’s acquisition of the Museum on 4th
- Native Sons Hall on Cliffe Avenue

The City is also seeking strategies to link the downtown and eastern commercial development through projects like the Lewis and Simms Millennium Parks, and to continue preserving historic sites. They seek to designate 5th street as a heritage corridor.

A culturally sensitive project is currently underway by the K’ómoks First Nation. Weather and flooding are eroding traditional ancestral burial grounds and the Nation seeks to repatriate the remains and develop a Community Grave House. This effort is supported by some funding from the Comox Valley Community Foundation. Building a local

legacy together (both local governments and local First Nations) is essential to contemporary cultural policy and planning.

Regional Cultural Industry Profile

“Cultural industry” is an umbrella term for areas of creative work and cultural production, such as: advertising, architecture and interior design, visual and applied arts (e.g. artisan crafts), fashion design, industrial design, performing arts, print media and publishing, film, radio and television and visual media (e.g. video games).

When the cultural sector is taken as a whole, it represents \$53.4 Billion dollars or 3.4% of Canada’s Gross Domestic Product—outperforming industries such as forestry, agriculture, and fisheries combined, as well as utilities, sport, and accommodation and food industries.

The reason the cultural industry has such a major economic impact in Canada is the shift from traditional sectors to creative and knowledge-based economies. These more recent economies demand less financial input (e.g. volunteer labour, no bricks and mortar) to generate their significant economic impact.

As such, many communities across Canada are trying to attract creative professionals and knowledge workers who are enticed by quality of life amenities, such as recreation, culinary scene, arts and culture. Local governments are also fostering and incorporating cultural development in their organizational culture either through direct staff representatives, cross-departmental teams and/or integrating into their planning initiatives.



87,996 jobs in cultural industry

24,800 artists

Generates more than \$5.7 billion into provincial economy

Source: Ministry of Tourism, Culture and the Arts, 2010-13

At this time, local governments in British Columbia are often saddled with the bulk of cultural investment in their communities, as the province has historically received the lowest amount of federal funding for arts and culture in Canada. While new funding through BC's recently announced Creative Economy strategy has been of

assistance the province is still one of the lowest spenders on arts and culture of all the provinces and territories, though again there is increasing investment. Similar to deferred infrastructure investment, this results in B.C. municipalities evaluating priorities and gauging optimal funding requirements to ensure community arts and cultural resources and assets can be maintained. (Hill Strategies, 2015).

A notable consideration for Courtenay is the size of its labour force; while the City is home to 26,599 people only 11,675 are within the labour force, which is nearly half the population. Similar to national figures, Courtenay statistics indicate a combined 3.9% of the population identify themselves as recreation, arts, entertainment and cultural industry workers. The City's leading employment sectors are the public sector, health care and social assistance, and retail.

Stats Canada: NHS Profile – Courtenay vs. BC – Industry (2016)

Industry (NAIC 2011)	Courtenay (11,675)	BC (2,354,245)
Retail trade	2,040 (17.5%)	266,265 (11.3%)
Health care and social assistance	1,515 (13.0%)	249,030 (10.5%)
Public Administration	910 (7.8%)	143,875 (6.1%)
Arts, Entertainment and Rec.	330 (2.8%)	56,915 (2.4%)
Information and cultural industries	145 (1.2%)	62,235 (2.6%)

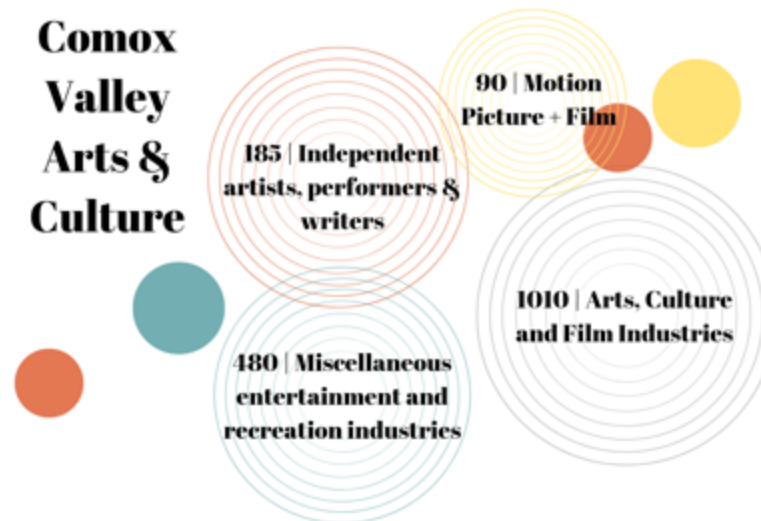
Stats Canada: NHS Profile – Courtenay vs. BC – Industry (2011)

Insights into the Comox Valley: Arts and Cultural Industry¹⁴

Identification of cultural work should follow NAICS and be in keeping with Statistics Canada's Cultural Resources Statistics Framework. A recent cultural mapping exercise

¹⁴ Throughout the document 'arts and culture' are often used together, however, the reader should note that arts is a subsector of culture in keeping with the NAICS industry classification and Canada's Cultural Statistics Framework.

conducted by Comox Valley Arts and other community partners, estimated the cultural workforce to be between 4,000-6,000 in the region and included a larger and more diverse sampling than the Vital Signs report which offers following update on the arts and cultural sector, displayed in the following infographic:



Few sectors of the economy have the potential to transform communities like the creative industries. Not only can they reshape a city's or region's image, but they are well positioned to become magnets for outside talent, and to boost the vibrancy and quality of life from which to provide an economic advantage over competing communities or regions.

Creative industries fuel a 'creative economy' – namely, one driven by ideas, innovation, knowledge, diversity, collaboration and creativity. This economy encompasses the creative industries in which ideas and intellectual property produce value and generate wealth.

Building on the idea that creativity and culture can be a generator of economic growth, local governments and cities around the world are directing more and more investment towards new cultural industries and districts. This includes public spaces whose cultural amenities are intended to harmonize different social interests and improve the quality of urban life. This response reflects the changing nature and role of cities and, moreover, the shift towards a service and knowledge-based economy. Indeed, creativity, human capital and the capacity for innovation are increasingly the means to measure whether a community is competitive –

both regionally and globally. These developments are, in turn, leading many communities to rethink:

- **The quality of place** in their communities and assess the urban assets that contribute to sustainable economic growth;
- **Their ability to attract the workforce talent** associated with this new creative economy; and,
- **Their broader cultural resources, amenities and facilities** by seeing them as strategic urban assets, which play an important role in cultural planning and an emerging new economy.

Culture is a key foundation of an economic development where the ability to innovate, problem-solve and communicate is both valued and rewarded. In communities such as Courtenay and the region, we understand that there is growing recognition of arts and culture as an economic engine and, in turn, growing demand to facilitate stronger connections between local arts and business communities. Increased public and private sector support of cultural enterprises and innovations – ultimately supporting the attraction of human capital to a locale that can offer near-

shoring¹⁵ to larger centres such as Vancouver and Victoria. A notable contribution to bolstering the creative economy would be training and education opportunities such as theatre and film tech programs, as well as arts administration courses at North Island College.

2.2 Current Trends and Practices

Arts and Culture Landscape in B.C. and Canada



Canada's cultural landscape is changing. Understanding the broader context of these changes and their potential impact on planning and policy-making is key to ensuring a current

and adaptive planning for cultural investment at local and regional government levels.

Broader Context: What's Ahead for Arts & Culture?

Leadership in Truth and Reconciliation: The Calls to Action identified in the October 3rd, 2015 Truth and Reconciliation Commission Report identify a number of specific actions that local governments and arts and cultural organizations need to consider in their community context, namely not the encouragement to include Indigenous artistic practice and participation but the expectation that this peer-based inclusion is present in the organization's work. Further consideration for local governments is the reflection of place names and language preservation in keeping with the Declaration of the United Nations on the Rights of Indigenous Peoples.

Lifecycle of Arts Organizations: The 1970s in BC, in particular, represented a time of significant investment of arts and cultural organizations and related assets. Many arts organizations are maturing and are perceived to be preventing new entrants and growing organizations from

¹⁵ "Near-shoring" is the practice of sourcing business inputs from nearby locations instead of off-shoring to another country. (e.g. using a network of workers on the West Coast- Vancouver-mid-Island/Victoria-San Diego)

receiving increased funding. As such, many funding bodies are now trending towards, or at the least further considering, a life-cycle-based approach to funding (as opposed to artistic discipline). Arts organizations will need to focus on capacity-building in-keeping with life-cycle indicators and characteristics (e.g. start up, growth, maturity, decline/renewal, and termination, respectively). Defining the City's role in supporting capacity-building is an important consideration to the City of Courtenay.

New Approaches to Art-making: These new approaches are at odds with funding models. Partly generational and partly creative, new approaches to art-making and space requirements are generating more entrepreneurial instincts towards creating and sustaining artistic practices. In turn, creating spaces for new approaches is a further consideration for cultural planners.

Social Practice: Rapid scale prototyping to respond to community issues. As evidenced globally, and more recently in response to the U.S. election, artists and arts organizations are more actively responding to their societal context in rapid-scale production. The strength of this approach is demonstrating the relevance of the arts as a medium for the expression of social change, especially amplified through social media channels. An extension, as

shown in many US and UK examples, is using the arts as a strategic tool (one example: using architectural choreography with crane operators as part of a campaign to attract young workers to trades).

New Operating Models eg. Epoch model: While the life-cycle approach to funding is one aspect in the broader context of artistic and operational practice globally, new operating models are also being generated where a specific, temporary, and designed operational life-cycle is envisioned rather than the 'let's create it and continue indefinitely approach' Instead, an end date is set as a part of a collaborators' contract.

Digital Strategies: Today, enormous societal changes are underway largely driven by the emergence of new digital technologies. These technologies are driving behavioral and preference changes in audiences to where arts and creative content are becoming 'experiences' rather than commodities or services. As further detailed in the International Context section of this report, whether it is for creative content production or engagement purposes, digital is here and arts organizations must consider this as part of their mix. Typical digital strategy pillars for organizations now include:

- Creation/production
- Access/dissemination
- Marketing/engagement
- Sales/fulfillment
- Asset building

The introduction of the \$88.5 million Arts in a Digital World funding program of the Canada Council stresses an importance of cultivating creative ecosystems in communities that encourage partnerships between sectors such as tech, entrepreneurs and the arts.

Generational Considerations: Increasingly in the future, the maturing millennial demographic will become an important consideration. As suggested above, these audiences are driven by personal relations and human connections principally facilitated through social media and modern technologies. A future objective should be to implement targeted arts engagement strategies that are familiar with specific programming and service delivery initiatives.

Changes to the Non-profit Landscape: In 2011, Imagine Canada identified seven major ‘drivers’ that were having an effect on Canadian non-profit organizations in general and various governmental operational services in particular.

They are:

- The increasing importance and influence of social innovation in Canada;
- Structural shifts in the revenue base which supports the work of charitable and non-profit organizations;
- Shortage of talent to strengthen and lead charitable and non-profit organizations;
- Lack of growth in the number of volunteers to govern;
- Support and promote civic and community organizations;
- Heightened demand for transparency, accountability;
- Communication of impact and public policy engagement;
- The growing need for transformative partnerships among charities and non-profit organizations and with other sectors.

Festivals and Audience Trends: The City of Courtenay recognizes the expanding reach of festival-based and outdoor multi-arts delivery and participation as the main channel for cultural participation which also sees digital (and live-to-digital) experience emerging.



¹⁶ The main personal benefits cited among participants in a recent large-scale survey of performing arts attendance in Canada.

Creative Place-Making: Creative place-making is an evolving field of practice that intentionally leverages the power of culture, creativity and the arts towards serving a community's needs. In a broader agenda, the goal is to create change, growth and transformation in a way that builds both character and a sense of place. Today, there is a major cultural policy and funding shift in the United States that positions community-driven arts at the center of its community planning and development.

Family Arts: Addressing how to best be a welcoming venue and/or arts organization to families is an increasing expectation of arts and cultural participants. This extends beyond offering programming and activities for a range of ages (which organizations should already be doing) and delves deeper into how organizations can take steps to make performances/activities appropriate so that they can be enjoyed and appreciated by all members of the group taking part.

Accessibility Arts: Removing barriers to participation and ensuring access to the arts is an increasing focus and expectation of government funders. This extends beyond the pre-requisite of physical access to arts and cultural

facilities and considers mental, visual and auditory, developmental and other sensory challenges. Integrated participation (i.e. not separate programming) is further encouraged to allow for a more fully immersed participation experience for those with accessibility needs. Accessibility and inclusion extends to pricing of arts and culture (ie. providing free experiences) and including broader narratives beyond traditional euro-centric art experiences or histories, and in turn, the welcoming of arts and cultural experiences reflecting many cultural heritages. New art forms are emerging that present art specifically for people with accessibility challenges (e.g. deaf theatre).

Canadians cited **collective community** benefits of performing arts:

42% | "Bringing energy and vitality"

38% | "Improving quality of life and well-being of residents"

37% | "Fostering a more creative community"

32% | "Promoting economic development"



3. Cultural Partner Profiles

In keeping with the aims of this review report, the following section provides a snapshot of each arts and cultural partner— those organizations currently in a partnership or license to occupy agreement with the City of Courtenay as well as the Comox Valley Arts. This section provides summary information and the authors thank the arts and cultural organizations for the detailed information provided.



3.1 Comox Valley Art Gallery

History of the Organization

The Gallery's origins are found in the Central Arts Alliance (CIAA), a group established in the early 1970's by area artists that operated under the umbrella of the Comox Valley Arts. The CIAA has been recognized by the Cultural Services Branch of the Province of British Columbia since its inception and has had status as both a British Columbia society and federal charitable organization since 1974. The Board of Directors of the CIAA voted in 1997 to change the organization's name to the Comox Valley Art Gallery to reflect the now core business of visual art exhibition programming. The CVAG relocated to a municipally owned building in 2005, and the gallery now features contemporary, experimental and applied art by regional, national and international artists, educational workshops, and retail space in the former Fire Hall in downtown Courtenay.

Mandate

The Comox Valley Art Gallery is a regional public art gallery dedicated to exhibiting, interpreting and celebrating emergent contemporary art practice. This includes facilitating art education and critical conversation and

presenting programming that encourages an ongoing exploration of the arts and their role in shaping and clarifying our culture. We do this in a welcoming and engaging environment where all visitors and participants are invited to examine, challenge, and transform their understanding of the world around them.

The gallery's vision is:

- To foster the awareness, exploration and development of contemporary visual arts through exhibitions, education activities and projects.
- To be an educating facility presenting contemporary art issues and practices in the form of artists talks, panel discussions, workshops and symposiums.
- To facilitate an experience for visitors to have a new or increased understanding of the visual arts that is accessible and inspiring yet also challenging, thought provoking, and energizing.
- To benefit the entire community by contributing to the cultural, social and economic vitality of the Comox Valley through our activities.

Organizational Structure

The CVAG is a non-profit society governed by a 13-member Board of Directors. The staff team is led by an Executive Director who delegates responsibilities among the gallery's various operations and services among herself and three core staff, including a Curator/Program Director, a Co-Curator, and a Hub and Program Facilitator. Based on grants and special projects, the gallery employs additional full-time and part time staff, including various gallery assistants, project leaders, technicians, and retail/visitor engagement staff. Volunteers support various activities in both the gallery and retail space.

Relationship with the City

The CVAG is a public gallery, located in a municipally-owned building and receives partial financial support from the City. The CVAG understands its central role in Courtenay's arts and culture scene but is less than clear on their position within the City's priorities for arts in culture due to a lack of a cultural plan and a lack of clear direction on the City's aims for art and culture. The CVAG's relationship to the City has also experienced changes with regard to the funding framework.

The agreement delegates responsibility for repairs and maintenance for the space they occupy - the space occupied by the art gallery but not the entire building. The building is located on the main and basement floor of 580 Duncan Avenue Courtenay, British Columbia, for community benefit.

Goals and Objectives

The goals and objectives of the CVAG are in accordance with CVAG's mission to:

1. Develop and produce a program of exhibitions, events and related activities that strengthen the gallery's role as a nexus for arts-based inquiry.
2. Increase the gallery's role and presence in community development.
3. Increase community engagement.
4. Support our mandate by ensuring the necessary resources (people, place and funding) are available.
5. Strengthen the gallery's governance.

These specific goals and aspirations are actioned through the following approaches:

- Increasing Social Return on Investment (SROI);
- Conducting more meaningful research;
- Expanding/enhancing its role in creative aspects of the community's public sphere; and
- Exploring new ways of being a gallery to become a national leader in arts-based organizational innovation.

Over the next 5 – 10 years, the gallery's activities are intended to:

- Develop a greater connection with the national arts dialogue;
- Build up a more robust research agenda on public art and arts-based inquiry, and;
- Build greater networks.

Challenges and Constraints

Current challenges faced by the CVAG include aspects of organizational capacity such as space needs and core staffing. Other challenges include a lack of "base level" technological capacity and time for substantive education and outreach, management and administrative gaps and fundraising. An absence of clear, supportive public policy,

and consistent, multi-year funding at the level required to deliver on these fronts is an additional constraint.

Key Strengths	Needs/Challenges
Research	Space
Grant funding	Lack of public policy to align with
Interpretive programs	Diversified funding
Knowledge and expertise; well-managed	Staffing (need for more education)
Community and national relevancy	Recognition

Programs and Partnerships

The CVAG delivers nationally-recognized and community-relevant exhibitions and events that provide the region with a dynamic and important visual arts gallery. The gallery's programs include exhibitions, convergent programs, make art projects, artist talks, creative residencies, Youth Media Project, CVAG Film Series, and more. The CVAG engages in many partnerships to deliver its programming including the

K'ómoks First Nation, North Island College, North Island Hospital, McLoughlin Garden Society, Service Canada, Wachiay Friendship Centre, the Comox Valley School District and many other local businesses and organizations.

3.2 Courtenay and District Museum (CDM) and Paleontology Centre

History of the Organization

The Courtenay and District Museum (CDM) was established in 1961 as a not-for-profit organization, whose mandate was and remains to collect, preserve and interpret the natural and cultural heritage of the Comox Valley region. The collection remains split between natural and cultural themes, with the natural component of the collection rooted in paleontology, and a cultural component comprised of three-dimensional artifacts, historical photographs and archival holdings. The CDM has enjoyed an international reputation for its strong paleontological collection and has seen recent success with a well-received publication focused on its cultural collection.

1999-2000 The museum society purchased, raised funds independently and, with financing \$400,000 with the City of Courtenay and Community Futures Strathcona, renovated

the historic 21,000 sq. ft. 1925 Post Office (expansion in 1958) in 1999-2000. In 2004, the CDM turned ownership over to the City of Courtenay in 2004. In turn, the city and museum negotiate service agreements and confer year round on capital and operating items. The CDM governs independently and owns all collections.

Up to 1987, a diverse group of volunteers managed the governance and everyday operation of CDM. Archaeologist, Katherine Capes, was a founder along with Ben Hughes, Editor of the Comox Argus, First Nations leaders Chief Andy Frank, Robert Clifton and many others. The Board has always included a member of K'ómoks First Nation appointed by Chief and Council.

2008 saw the renovation of the historic Capes family home on seven acres donated by founder, Katherine Capes for a long-term revenue source. In 2009, Heritage BC awarded the museum for efforts on Capes Escape.

Mandate

i. Support natural and cultural heritage awareness in the community:

- Maintain, collect, and preserve the Museum Collection;
- Maintain program subjects which are to include but are not limited to: fossils, geology, First Nations History,

pioneer settlement history and social history of the Comox Valley;

- Partner with other local organizations to support natural and cultural heritage awareness in the community.

ii. **Provide an inclusive and accessible Museum:** Operate a museum which is inclusive and accessible to members of the community despite physical or economic barriers.

iii. **Promote and schedule diverse programs and exhibits:** Establish a permanent collection for display. Schedule changing exhibits which highlight local, regional or provincial collections. Offer on-site and outdoor programming suitable for all age groups.

Organizational Structure

The CDM is governed by a Board of Directors, which moves on decision-making with a collaborative approach. A limited team of museum staff (three full-time) administer the space and programs, along with support of three contractors for project-based work. Each summer, the museum hires students and participates with high school work experience students. Volunteers continue to play a vital role and work in specific curatorial areas on a weekly basis. The museum is open five days a week 10:00-5:00, September-May and

seven days a week May-September 10:00-5:00. School and public programs run from 9:00-5:00.

Relationship with the City

While the CDM does not yet have a strategic plan, it holds an agreement with the City related to long-term financial support, the license to occupy the CDM's venue, and a shared understanding of the CDM's financial and operational models. However, the CDM would benefit from additional planning, operational and capital support from the City, and lacks clarity on the aims of the City in the areas of art and culture more generally.

Goals and Objectives

The CDM plans to build on the success of its cultural history publication by embarking on another publication project, in addition to pursuing the goal of obtaining greater space for the Museum. Leveraging the Museum's paleontology assets and recognition is also being planned as well as building relationships with the K'ómoks First Nation and integrating an Indigenous lens on the collection and in particular, the paleontology work. Ensuring adequate and fair wages to staff is another key area of focus for the organization.

Programs and Partnerships

The Museum carries out community programs, fossil tours, group programs and fosters accessibility in its programming. Further community partnerships such as with tourism and economic development would benefit the region. Of the 23,500 visitors to the museum in 2015-2016, over 5,300 were students participating in school programs, 1,500 for lectures and 3,200 for special events. Others participated in year-round fossil tours and viewed permanent and changing exhibitions.

Museum staff lead/support regional projects on an ongoing basis. Example: creation of the Comox Valley Heritage Experience, a suite of driving and walking signs and brochures exploring the history of the region. Other examples of community involvement: Centennials of E&N Railway and the City of Courtenay in 2014 and 2015, Courtenay Rotary's Trails to Rails project and the Royal Canadian Legion Courtenay Branch Wall of Remembrance. The CDM also led the idea for a downtown historic image mural project. The CDM has been involved with the North Island Hospitals Project (NIHP) and just completed a "Living Wall" project with NIHP, Comox Valley Art Gallery, Comox Air Force Museum and the Comox Valley Photographic Society.

For over 30 years, the CDM has been an active member of the BC Museums Association (including on Council), the Canadian Museums Association, Heritage BC and the BC Archival Association.

Key Strengths	Gaps/Challenges/Needs
Skills base and Board	Lack of staff and resources (proper wages)
Assets/collection	Need for a strategic plan (that addresses digital and succession planning)
Accessibility, Family-friendly	Diversified funding and fundraising
Individual crowdfunding/project-based funding	

3.3 Sid Williams Civic Theatre (SWTS)

History of the Organization

The SWTS has served the Comox Valley for over 25 years as a performing arts facility and has been under the professional administration of the Sid Williams Theatre Society (SWTS) since 2000. The theatre began as a privately-owned movie house in the 1930s and has evolved over the

years to become a 500 seat Civic Theatre for the performing arts in Courtenay while serving the Comox Valley community. The SWTS was formed in May 2000 as a response to the need for professional administration of the Theatre. From the 1970's until 1999, the City held ownership of the theatre and it was operated by the Courtenay Recreation Association during that time. The City no longer has a controlling interest in the theatre's Society and relevant documents have been updated to reflect this.

The SWTS exists as a membership-based Society led by a volunteer Board of Directors who oversee the governance of the Society to the ends of the successful administration of the Theatre and its programming.

Mandate

The Sid Williams Theatre Society is dedicated to the stimulation and enhancement of artistic, cultural, and recreation activities in the Comox Valley and surrounding regions through its operations of the Sid Williams Theatre. Its core values are: inclusion, diversity, accountability, professionalism and community-building. These values are carried out through its mandate:

- To govern and operate the SWTS in an ethical and cost-effective manner for the benefit of our whole community;
- To provide improved opportunities for artistic talent;
- To cultivate interest and participation in, also to foster the appreciation and enjoyment of, the full range of performing arts and culture in the Comox Valley and region;
- By presenting plays, music, dance, film productions and other performances;
- By undertaking public educational projects in furtherance of the aims of the Society;
- By incorporating elements of lighting, sound and other technologies of the theatre industry in performances where appropriate;
- By encouraging local, regional, national and international cooperation in the theatre community.

Organizational Structure

The SWTS is run by the SWTS, which is governed by an eight-member volunteer Board of Directors responsible for the governance, policy development, fundraising, and advocacy of the SWTS and SWTS. Decisions are made within the framework of the organization's strategic plan with programming input from the Board and the hiring of the General Manager. Delegation of the running of the theatre

is made to the General Manager. The theatre benefits from 150 active volunteers, 11 full-time employees and five part-time employees encompassing administration, technical and front of house positions, as well as casual/on-call staff of four.

The public is able to purchase annual memberships which provide audience-oriented benefits and the opportunity to vote at the Annual General Meeting of the Society. Membership at time of writing is 607.

Relationship with the City

The relationship between the SWTS and the City is a supportive one, as the City provides significant annual funding and facility maintenance support. Over the years, the relationship between the Theatre and City has seen changes including a loss of key staff and Board members, reduced management and supervisory structure, planning, and leadership. The Theatre has a license to occupy arrangement with the City that now also includes management and operating services deliverables. There is a lack of clarity on the City's overarching aims in the areas of art and culture and a corresponding lack of clarity on how the SWTS contributes to and aligns with these aims.

At this time the fee for service partnership agreement between the City and the SWTS has the following objectives:

- **Support arts in culture in the community:** Manage a professional theatre to house professional and commercial rental groups, provide subsidized rental rates to qualified non-for-profit community renters.
- **Provide financial and educational support to students** looking to further post-secondary education in the performing arts.
- **Partner with other local organizations** to support arts and culture in the community.
- Provide an **inclusive and accessible** theatre experience:
 - Operate a theatre which is inclusive and accessible to members of the community despite physical or economic barriers
 - Support diverse events and programs: Schedule and promotion of a wide range of theatrical experiences of performers both local and global to attract audiences of all age groups and interests.
- **Fundraise and apply for grants:** Undertake fundraising projects and that the proceeds of such projects will be used solely for the operational and maintenance costs of the Theatre or be used to make capital improvements to

the Theatre or for the purchase of equipment for the Theatre.

- **Manage and schedule the Theatre and Civic Square Plaza Bookings¹⁷:** Manage and schedule the rental and booking of theatre space and coordinate the receipt of all required risk management and technical requirements for said rentals and bookings.

Goals and Objectives

Current and longer-term goals for the SWTS on behalf of the SWTS include developing long-term capital planning in partnership with the City; improved organization resiliency; expanding youth programming and the implementation of a succession planning model. Other planned activities include an assessment of services to all clients and a review of facility needs. The theatre has benefited from working within a strategic planning framework which concludes this year with a number of key actions having been completed.

¹⁷ Please note: the management and scheduling of the Civic Square Plaza has been taken over by the Recreation Division.

Challenges and Constraints

Challenges facing the SWTS include:

- **Human Resource Limitations:** need for more specialized support staff, and stronger ability to compete in future for qualified personnel in skilled positions.
- **Facility-related:** accessibility, facility maintenance, technological upgrades and general renovations (small lobby space; small stage, no fly system/no over-stage hydraulics); very limited office space.
- **Competition for both staff and events** with larger, better-equipped and funded facility, the Port Theatre, an hour's drive.
- **From a financial perspective only,** heavy community usage/cultural recreation significantly reduces opportunities for commercial/profitable productions, however, the theatre sees community usage as part of its core mandate and values.
- **The development of an alternate performance space** in or near the Sid, that could still benefit from SWT's professional resources (box office, technicians, equipment, marketing) could improve the balance of

usage for this high-volume venue currently operating at capacity in a growing community.

Programs and Partnerships

The SWTS has active outreach programs, offers bursaries, memberships and theatre rentals. It enjoys community support and collaborations. It offers a variety of events throughout the year and its own series (e.g. ongoing events, Blue Circle Series, Sid Docs, Family Film Series, Centre Stage Event, etc.)

Strengths	Gaps/Challenges/Needs
Community support	Increased resiliency/capacity
Transitioned to growth cycle	Succession planning
Youth programs	Business partnerships
Adaptability/flexibility (e.g. to community needs and trends)	Facility development

3.4 Comox Valley Community Arts Council (Comox Valley Arts)

History of the Organization

Now operating as Comox Valley Arts, the organization's history can be traced back to an early organization of artists and arts advocates who united in response to a lack of arts programming in the Comox Valley area in the 1960s, leading to the forerunners of the Upper Island Arts Council (UIAC) in 1965. The Council was later re-named the Comox Valley Community Arts Council to reflect the scope of its membership and services. CVA's role has consistently been one of organizing and promoting arts and cultural activities for the Valley region and has grown to include a suite of member services including professional development workshops and acting as a point of contact for arts-based tools and supports for Comox Valley Arts groups and individuals of all artistic disciplines.

Mandate

Like many arts councils which sprang up in the sixties and early seventies around the province, in the years since inception and transition to the Comox Valley Community

Arts Council (CVA), the Council has initiated, supported or sponsored a growing proliferation of arts events involving local cultural groups. In its current status, Comox Valley Arts continues to fundraise, organize and facilitate arts and cultural activities in the community, as well as provide programs, seminars, professional development workshops, exhibitions, and other forms of support and benefits to its 300 members¹⁸ in the Comox Valley community. Its work centers on building the capacity of arts and culture organizations and individual members in the area.

Relationship with the City

CVA is a not-for-profit organization and receives a small amount of funding from the City through the grants in aid program. The relationship between CVA and the City has changed over the years in positive ways thanks in part to new City management, shifts in planning focus, and a recent turn toward more arts and culture-oriented marketing advocacy. CVA currently acts as an agent on behalf of the City for the City's annual mural project. CVA is hopeful about being brought into a more engaged, continuous role in support of City goals and priorities, pending the City's support of CVA's capacity to deliver. CVA maintains that

¹⁸ Many of CVA's members are membership groups themselves, thereby amplifying CVA's reach.

their own strategic plan contributes to the aims of the City of Courtenay in terms of downtown revitalization and community engagement yet remain unclear on the City's intended directions in the areas of art and culture more generally.

Goals and Objectives

The goals and objectives of CVA reflect its vision to facilitate and animate arts and culture in the community, and to serve the community by acting as a resource for the arts; informing the public about the arts; and celebrating the Comox Valley as an arts-producing centre. There are growth opportunities for the advancement of cultural service delivery, building recognition, and shifting the language on the arts in the regional discussion. Long-term objectives include a greater investment in facilities, to build revenue and operational capacity, and to develop new operational plans on a year-to-year basis.

Organizational Structure

CVA is governed by a four-member Board Executive lead by a Board President, and 9 Directors-at-Large. The organization is described as "staff-driven", the two staff at

present being the Executive Director, and Community Engagement Director. The organization is membership-based, with 300 members at the time of writing. CVA operates on a budget comprised of corporate donors and sponsors, grants, public funders including the City of Courtenay, media partners and numerous private donors.

Partners and Programming

CVA is an active community partner and has generated many public and private supporters and media supporters and works with numerous cultural groups and organizations in the delivery of arts and cultural events, festivals and projects (e.g. over 50). Partners in these pursuits include the City of Courtenay, the Comox Valley Art Gallery, the Sid Williams Theatre, the Comox Valley Justice Institute, the Vancouver Island Regional Library, North Island College, the Comox Valley School District, KFN, CVEDS, Village of Cumberland, CVRD, and numerous local businesses. Key programming includes: 30-Day Drawing Challenge, Central Island Arts Guide & Studio Tour, Downtown Courtenay Summer Street Markets, and Youth Music Showcases. Membership services and resources (postings, networking, support, directory, advertising) are also offered; along with professional development for creative professionals; delivering the Comox Valley Poet Laureate Program; and Exhibitions.

Challenges and Constraints

In terms of organizational capacity, CVA has identified a need for more full-time staff, administrative support and part-time staff. While CVA's budget includes 40% in earned revenues—a 300% increase in 2 years and notable success, the lack of core funding impacts staffing which in turns impacts the organization's capacity and results in compromised programming and/or decreased ability to deliver programs which support cultural development. CVA also identified recently they require more office and programming space.



Key Strengths	Gaps/Needs/Challenges
Fills the gap of cultural planner ¹⁹ at City level	Multi-year funding from local and regional levels for staffing
Knowledge and relationships with community stakeholders/Strong community engagement	Improved relationship with City (City understanding and acknowledging CVA role)
Tech savvy and well-organized/managed	Lack of physical space
Solid Board of Directors and accountability	Burn out
Quality programming (especially capacity building)	
Good relationship with funders	



¹⁹ CVA has the opportunity to fill the existing gap of cultural planner and provide community cultural planning. However no official mandate, funding or agreement in place.

4. Cross-Jurisdictional Analysis

(Case Studies)

In view of their recognition of arts and culture in contributing to a higher quality of life, thriving creative economies, and growing cultural tourist destinations, the **City of Revelstoke, B.C.**, the **City of Maple Ridge B.C.**, and the **Town of Aurora, ON's** cultural strategies were considered in terms of relevant practices, target groups, and collaborations/partnerships. The **City of Salmon Arm, Sechelt**, and **Nelson** were also evaluated for their successful approaches to arts and cultural vibrancy.

Like the **City of Courtenay**, each of these municipalities offer several museums, art galleries, and theatres, as well as cultural activities and events occurring throughout the year. A full profile, strategic summary, and analysis is available in Appendix B.



Case Study 1: The City of Revelstoke, BC

The strategy from Revelstoke is relevant to Courtenay because of the City's focus in ensuring there is a diversity of recreational and cultural programming for all ages, including youth and seniors. Furthermore, it highlights the need for Courtenay to:

- Work with community agencies in the delivery of the program, which could include in-kind support, space, equipment, etc. For example, to increase the number of youth programming, the City could work with community agencies and the School District.
- Coordinate and collaborate among the various non-profit and government organizations to ensure effective use of limited resource, improve information sharing and the provision of coordinated programs and services. Not only would this would improve access to expertise within the City, but access to grants as well. Revelstoke is supported by an effective arts council which delivers programming but also capacity-building on behalf of the City.

Case Study 2: The City of Maple Ridge, BC

The strategy from Maple Ridge is relevant to Courtenay because of the comparable understanding of the role cities play in advancing cultural life for its residents. With a vision of growing community through culture, Maple Ridge's Culture Plan emphasizes the need to ensure everyone feels they can participate in the cultural life of the city.

To strengthen diversity and inclusion, the Culture Plan emphasizes the need to:

- Continue engagement and dialogue with the multicultural community; youth, seniors, new residents, immigrants, people with disabilities and the LGBTQ2S+ and gender diverse community.
- The cultural plan is rooted in place and titled 'Walking Together' to underscore the importance of working in partnership with local Katzie and Kwantlen First Nations.
- Use culture as a tool to enhance dialogue and opportunities for marginalized communities through inclusivity initiatives, such as ticketed access, free events, and programs with identified partners.
- Work with relevant community organizations, to consider the creation of a community Arts Cultural Accessibility Fund which would help minimize barriers

for these communities to partake in the cultural life of the city.

- To ensure there is continual dialogue, the City acknowledges it can play a role in convening a Cultural Leadership Roundtable meeting that provides an opportunity for collaboration, information-sharing, and event coordination. Membership at the Cultural Roundtable would include representation from arts and culture organizations, Indigenous communities, and the City's tourism and economic development division. To support the City's planning process, the Cultural Roundtable would be a strong resource to assist with the planning and implementation of programs and initiatives.
- Integrate culture strategically within City Hall particularly in economic development and tourism planning. While the Cultural Manager role is still housed with Parks, Recreation and Culture, a lot of interdepartmental team work has been advanced over the past two years to ensure a cultural lens is adding value to City planning. This is an important marker in cultural development—to see the shift from a programmatic lens to strategic—in achieving the City's broader goals.

Case Study 3: The Town of Aurora, Ont.

The strategy from the Town of Aurora is relevant to Courtenay because a thriving cultural community depends on public, private, and community partnerships. To build and sustain these partnerships, the Culture Master Plan recommends:

- The recruitment of champions from the community to act as advocates to support the implementation of the Cultural Master Plan and ongoing cultural development.
- Furthermore, it also recommends the creation of a Community Leadership Group that support the implementation of the Cultural Master Plan, but also seeks to find solutions to problems.
- The creation of an Annual Cultural Summit is also recommended, which provides an opportunity for business and community leaders to explore opportunities and challenges of a thriving cultural community. Members of the community-at-large and cultural stakeholders are then well-positioned to review the progress of the implementation of the Cultural Master Plan and identify new opportunities and initiatives. Furthermore, the Summit can be a platform for striking task-based working groups to advance cultural issues and initiatives.

Case Study 4: The City of Nelson, BC

Relevant to Courtenay is the administrative approach and responsibility the City of Nelson has taken to its arts and cultural programs. As a municipality, the City of Nelson works to engage multiple stakeholders, with the support of a planning committee such as the CDC (Cultural Development Committee) that meets monthly to offer high-level strategic approaches to further heritage, creativity, diversity, and excellence in Nelson's lifestyle.

- The committee has developed a comprehensive Cultural Policy which includes various publicly available²⁰ policy, bylaw, and reference documents to guide and shape the cultural sector. These documents are intended to guide the working groups, that coordinate the City's festival, heritage, and public art programs.
- The Cultural Development Committee is supported by a knowledgeable cultural sector City Staff employee.
- The strategic plan is timeline and goal-oriented and developed with political sensitivity, to the 4-year term the mayor and council has in office.

- The Recreation Master Plan recommends that the Nelson and District Recreation Commission preserve, maintain, and manage important indoor and outdoor spaces in a manner that supports community participation (p.16). Vital recreation, cultural programming, and studio space are offered through the city-owned youth center and also the civic center. Within the Recreation Master Plan Nelson's special events (64%) are cited as a leading facility use (p.104).

Case Study 5: The City of Sechelt, BC

The strategy from Sechelt is relevant to Courtenay because of the following approaches the City took to recognize the community's grass roots creativity and pro-arts advocacy:

- The City hired a coordinator to specifically support municipal and regional arts planning.
- Courtenay also has inter-regional considerations; it's at the core of the Comox Valley Regional District which includes communities such as Comox, Cumberland, Hornby, and Denman Island.

²⁰ <https://nelson.civicweb.net/filepro/documents/488?preview=21305>

To address this the Sunshine Coast Regional Cultural Strategy was published in April 2007 following the Sunshine Coast Regional District Regional Cultural Scan released June 30, 2006.

Case Study 6: The City of Salmon Arm, BC

The strategy from Salmon Arm is relevant to Courtenay because of their comparable regional geography, and their third-party delivery of arts and cultural services through a fee-for-service agreement (FFSA). The City provides annual support funding through a fee-for-service arrangement with the following three organizations. The following reflects the 2019 budget:

- The Salmon Arm Museum and Archives - \$80,000
- The Trial Alliance - \$50,000
- The Roots and Blues Festival - \$90,000
- The Salmon Arm Arts Centre - \$41,000 (+\$6,000 increase for 2019)

The contract is for a 3-year term and outlines the following terms for service delivery:

- General advice on Arts and Culture issues as requested by Council;
- Exhibitions, opening receptions and artist talks;
- Wednesday On the Wharf: summer concert series;
- Arts programming for young families, children and youth;
- Arts outreach programs for the public;
- Education programs for local schools and groups;
- Arts referral and support services;
- Meeting and working studio spaces for individuals and cultural groups.

5. Cultural Partners: Management and Performance Review



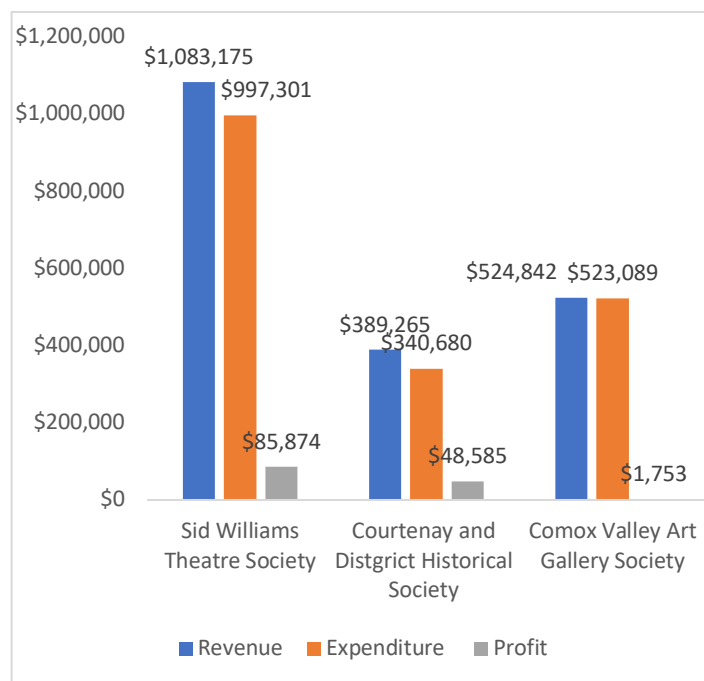
5.1 General Funding Comparisons

This section details the financial realities for the operating societies of the Sid Williams Theatre, the Courtenay and District Museum (Courtenay and District Historical Society) and the Comox Valley Art Gallery Society.

The three organizations generate a combined revenue of nearly \$2,000,000. All three organizations generated an excess revenue totaling \$333,508, creating significant local economic impact. As seen below, the largest organization is the Sid Williams Theatre Society, generating a revenue larger than the other two organizations combined.

The table below illustrates key financial details of the cultural organizations across comparable categories. Note, given the different operating realities and accounting practices of each organization, direct comparison is often not possible. As such, this table only includes categories where it is possible to accurately compare the financial figures. Further details of each organization can be found in Sections 6.1- 6.3.



Figure 1: 2017 Financial Reporting**Table 1: 2017 Operational Financial Reporting Tables**

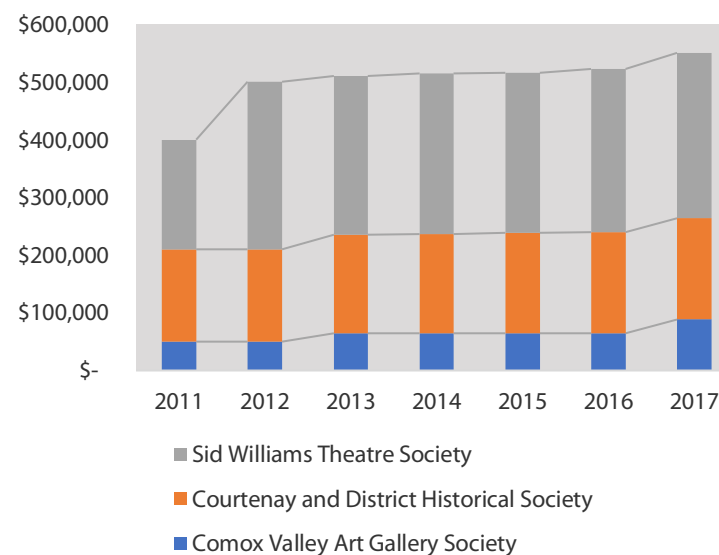
	Sid Williams Theatre Society	Courtenay and District Historical Society	Comox Valley Art Gallery Society
Revenues	\$1,083,175	\$389,265	\$524,842
Contributed Revenue	\$384,810 (36%)	\$260,664 (67%)	\$422,521 (80%)
City of Courtenay	\$286,600 (core funding \$231,600)	\$175,000 (core funding)	\$75,000 (core funding \$65,000)
Earned Revenue	\$698,365 (64%)	\$128,601 (33%)	\$102,321 (20%)
Donations	\$38,612	\$30,110	\$28,794
Facility Rentals	\$174,014	\$20,356	\$28,229
Other	\$480,608	\$78,357	\$45,298
Expenditures	\$997,301	\$340,680	\$523,089
Wages, Salaries Benefits	\$667,779 (67%)	\$153,880 (45%)	\$185,642 (34%)
Advertising	\$43,563 (4%)	\$8,669 (3%)	\$8,501 (2%)
Other	\$285,9595 (29%)	\$178,131 (52%)	\$328,946 (63%)

City Contributions

As shown in Figure 2 below, the City's contributions to cultural facilities has grown by 37% since 2011. The biggest contributing factor was the \$100,000 increase in support of the Sid Williams Theatre Society in 2012 to achieve parity with funding of other Vancouver Island and BC theatre facilities operating similarly to the Sid, and to address chronic under funding (due in part to one municipality, Courtenay, shouldering the load of a larger region/population served).

However, both the Courtenay and District Historical Society and the Comox Valley Art Gallery Society have seen increased support from the City as well. The Comox Valley Art Gallery receives \$65,000 from the City for core funding. In 2017 the Gallery also received an additional \$10,000 for a one-time grant in aid.

Figure 2: Annual City Contributions to Cultural Organizations



Other Sources of Funding

All three organizations receive funding from a variety of other sources, as indicated in the following table.

Table 2: 2017 funding amounts from different sources²³

Organization	Comox Valley Regional District	Town of Comox	BC Arts Council	Provincial Gaming	Canada Council for the Arts	Federal Government
Comox Valley Art Gallery Society	\$8,385	\$5,000	\$58,241	\$41,000	\$142,500	\$133,405 ²⁴
Courtenay and District Historical Society	\$12,250		\$25,000	\$40,000		\$8,164
Sid Williams Theatre Society ²⁵	\$25,000	\$12,000	9,000	\$7,909	X	25,000

In addition to the support from the key funding groups listed in the table above, each organization receives support from other groups. For example, the Sid Williams Theatre Society receives support from:

- The BC Touring Council (BCTC)
- TD Bank Financial Group

²³ These are specific to 2017 grant amounts and include one-time grants for specific projects.

²⁴ The Comox Valley Art Gallery Society receives funding at the federal level from Service Canada, Industry Canada and Canada Museums.

- Corporate Partners and Event Sponsors that include:

- Courtney & Anglin Real Estate Group
- Old House Hotel and Spa
- WhatsOn Digest
- The Eagle 97.3 FM
- Remax Ocean pacific Realty
- F12

The Comox Valley Art Gallery receives further support from:

- The Canadian Museums Association
- Community Support and Partnerships that include:
 - ABC Printing and Signs
 - Kumugwe Cultural Society
 - Community Justice Centre
 - Comox Valley School District

²⁵ The Sid Williams Theatre Society does not report specific numbers for each funding source. However, according to its website, it receives support from each of the groups listed in Table 2.

While the above organizations receive support from a diverse range of partners, the Courtenay and District Historical Society receives funding only from the four organizations noted in the table above. This reveals an opportunity for the City to work with the Society, which currently receives the largest portion of revenue from the City (44%), to diversify revenue streams and seek new partners.

Potential New Sources of Funding

The cultural funding landscape is constantly evolving, offering new opportunities for organizations to find support. A recent example (2018) is the \$88 million that has become available through the Canada Council for the Arts' [Digital Strategy Fund](#). The fund encourages an overall approach that helps support organizations in understanding the digital world, engaging with it, and responding to the cultural and social changes it produces.

The priorities of the fund are described as follows:

- A focus on collaboration, partnership and networking;
- Open-mindedness, and willingness to share knowledge, results, ideas and lessons learned; and,
- Experimentation, risk-taking and iterative development.

The Government of Canada's [Canada Cultural Spaces Fund](#) is another important funding option for cultural facilities around the country. The government has committed \$54 million over the next ten years to support cultural infrastructure. The fund is open to any arts and cultural organization or cultural facility manager and lists the following as eligible projects:

- Construction or renovation of arts or heritage facilities or creative hubs;
- Acquisition of specialized equipment; and
- Development of feasibility studies for the construction or renovation of arts or heritage facilities or creative hubs.

Locally, the [Comox Valley Community Foundation](#) provides \$250,000 in support to the community each year and could be a valuable local funder.

There are numerous sources for funding that may be applicable to one or more of the cultural organizations in Courtenay – far more than can be included within this report. However, there are several online repositories of funding options that can be leveraged to seek new funding opportunities. For example:

- Provincial organizations such as [Arts BC](#) help cultural organizations locate and successfully apply for grant

opportunities, and offer capacity-building tools and resources.

- While the Victoria Foundation only provides direct funding to groups located in the CRD, its [website](#) has an extensive list of roughly 100 national foundations/organizations (e.g., The McLean Foundation, Walmart Canada) that are potential funding options.

All organizations could also continue to seek community and business support in Courtenay though the challenge of a small region/limited business pool for support is recognized. In particular, searching for new sources of funding from organizations that may align with the mandate and mission of each organization will increase the likelihood of successfully sourcing support.

5.2 Sid Williams Civic Theatre

Operations

Using a Non-Profit Lifecycles lens and based on the assessment interviews and data provided, the SWTS has navigated through a period of decline and is in active turnaround and renewal. Through the leadership of its General Manager and Board, it has taken decisive action to

regain relevance and viability. It is now working in response to community needs, as best as it can at current staffing levels.

It is well-managed and its operations are in keeping with current theatre management practice and industry trends. It does, however, require a fuller complement of trained, skilled workers, and board representation. It has managed to continue to deliver its core services despite the stress of its past financial position and has addressed this through a trimmed-down staffing structure, and other expense-cutting measures.

In terms of systems and resources, SWTS is actively addressing how its systems need to be improved (e.g. moving towards a new CRM/ticketing system) to meet its marketing, programming and (eventually) expanded fundraising work. The SWTS would benefit from continuing financial planning and management support at the Board and City levels, especially considering its planned capital projects (see their Strategic Plan).

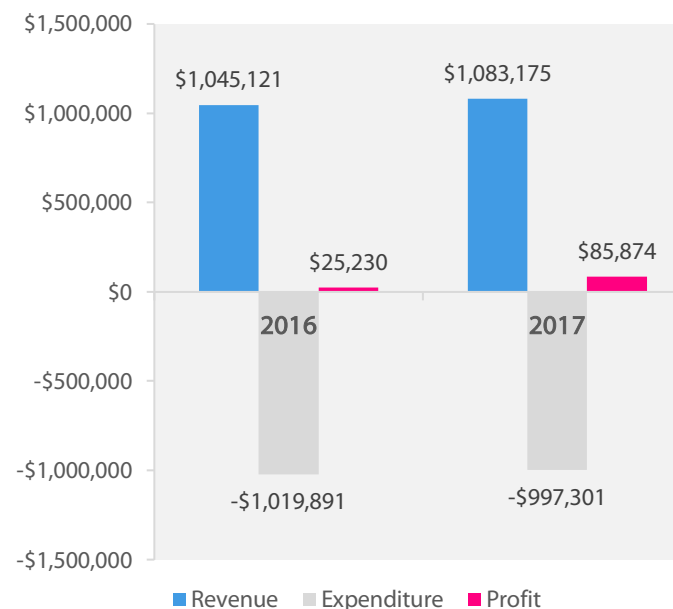
Financial Management

In 2017, the Sid Williams Theatre Society (SWTS) reported revenues of \$1,083,175. The Society generated an excess

revenue of \$85,874, which was more than a 200% increase from 2016.

Of that revenue, 64% is earned, with the remaining \$384,810 split between management fees (\$181,600) and a variety of provincial and other government grants, totaling more than \$200,000.²⁶ Support from the City of Courtenay equals \$286,600 (26% of revenues). These include management fees as well as a \$55,000 grant used to make improvements to the theatre.

Figure 4: Sid Williams Theatre (2016 – 2017)



The majority of the SWTS' earned revenues are generated through events and ticket sales (\$255,966). In terms of facility rentals, the SWTS earned \$174,014 in 2017 (16% of revenues). Furthermore, 2017 was the third straight year that the theatre saw growth in revenues generated from facility rentals. Additionally, it raised \$38,612 in donations,

²⁶ The SWTS received \$146,250 in Community Cultural Grants in 2017.

or 3.5% of revenues – notably less than the other two organizations.

Currently, the SWTS only receives \$25,000 from the CVRD. However, during interviews it was noted that support from the City to help lobby for further regional contributions or partnerships would be a key means for supporting the growth of the Sid Williams Theatre Society.

On the expenditure side, a total of \$997,301 was reported in 2017. As with all three of the organizations, labour related costs were the largest expenditure, totaling \$667,779. With a total of 16 staff in 2017, this is an average labour cost of \$41,736, notably higher than the other two cultural organizations in the city.²⁷ Despite the high labour expenditure, it was noted in the interview that the SWTS has struggled to find the talent required to manage and operate the theatre.

The total advertising expenditure was \$43,563, just over 4% of total expenditure. Roughly 60% of their marketing spend goes to marketing and promoting events, with the remaining 40% used for fundraising purposes.

It was also noted that maintaining the aging building is resource and cost intensive, making the Government of

²⁷ Note, the cultural organizations report a total number of staff and do not indicate whether these are full time equivalents (FTEs) or part time staff. As

Canada's Cultural Spaces Fund, discussed above, an important option for the SWTS. Furthermore, the SWTS expressed a desire for financial support to improve their monitoring, evaluation and impact assessment ability. Such analysis would help the theatre understand and quantify the value and impact they generate, allowing them to 'make the case' to funders and other potential or existing partners.

Monitoring and Evaluation

The SWTS ticketing system, annual reports and strategic planning, operating agreement with the City of Courtenay, annual BCAC funding applications and budgeting are the various monitoring and evaluation tools the theatre uses to assess its performance in a transparent and accountable way.

5.3 Comox Valley Art Gallery Society

Operations

The CVAG has seen an impressive growth in programming, however, its capacity has not caught up to its success. In particular, its funding from City and Regional sources does not reflect its new relevancy. The organization experienced significant decline and has navigated its turnaround since

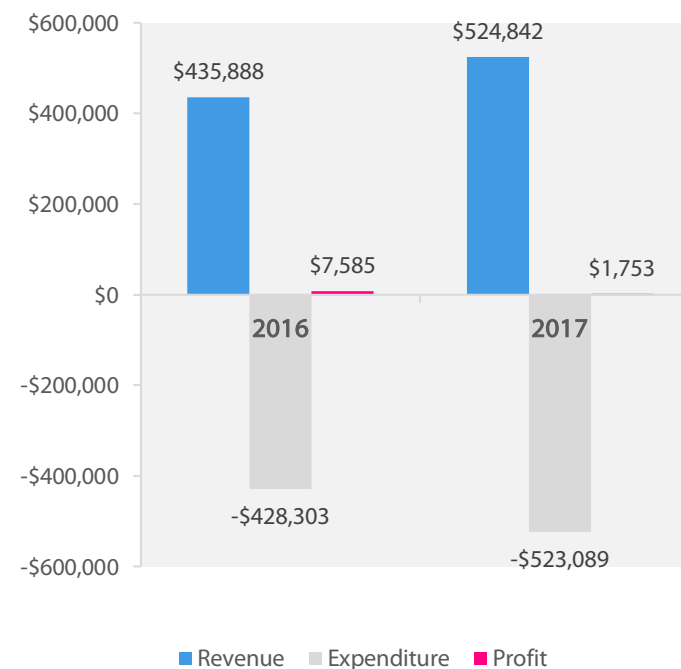
such, the average labour spend may not be directly comparable in terms of \$/FTEs.

2012. It is well-managed and is regarded as so from other levels of government. Like the Museum and Theatre, the Gallery offers a third civic space for community dialogue, experience and accessible cultural participation.

Further performance improvement could involve reaching an operating agreement with the City that includes multi-year funding to offer operational consistency rather than through the uncertainty of Gaming funds. Furthermore, they are looking to build on the recent success of their workshops by gaining support for an education and outreach coordinator. Such support would help build an important earned revenue stream for the Society while also providing community benefits through the provision of learning opportunities. Also noted in interviews was the lack of stability and long-term planning ability, due to the void of multi-year funding contributions.

Financial Management

Figure 5: Comox Valley Art Gallery (2016 – 2017)



As shown in Figure 5, the Art Gallery generated \$524,842 in revenue in 2017, a 25% increase from 2016. This growth was due in large part to an increase in federal funding by \$70,000 dollars and the success of rentals and workshops, generating \$28,229, up from just \$2,000 in 2016.

Of their revenue, 80% is contributed revenue, largely through the federal grant discussed above. The art gallery also received \$75,000 from the City of Courtenay (14% of revenue). This consisted of a \$65,000 operating grant and a one-time \$10,000 grant in aid. It also received \$13,375 from the Town of Comox and the Regional District of Comox and Strathcona.

In terms of earned revenue, the largest factor of their growth was due to rentals and workshop programming, discussed above. The Society was also able to raise \$28,974 in fundraising and private sector support in 2017.

In 2017, The Comox Valley Art Gallery Society reported \$523,089 in expenditures, with the largest contributor (\$185,642) being labour costs. The Art Gallery noted eight staff on their website, resulting in an average labour cost of \$23,205. It also reported a \$4,000 loss on the operations of their gift shop, due in large part to renovations that caused closures throughout the year.

Monitoring and Evaluation

The Gallery measures its performance annually through its strategic plan review, financial reports and programming updates provided at the annual general meetings and to various levels of government.

5.4 Courtenay and District Historical Society

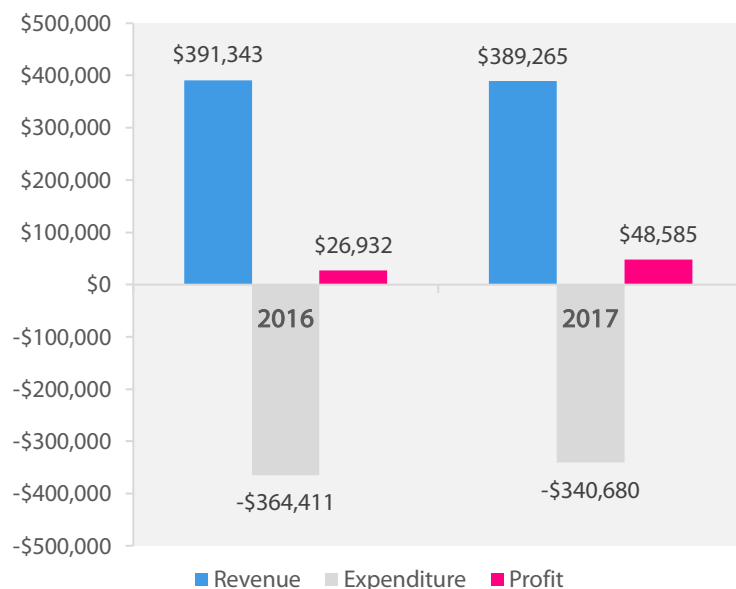
Operations

At present, the organization is in the mature stage of its lifecycle but is moving toward a phase of renewed growth and adaptation.



Financial Management

Figure 6: Courtenay and District Historical Society (2016 – 2017)



The Courtenay and District Historical Society reported revenues of \$389,265 in 2017, the smallest of the three organizations included in the scope of this work. 67% of revenues are contributed, with the largest funding source being the City of Courtenay (\$175,000 or 44% of total revenue). As with the Comox Valley Art Gallery Society, the Historical Society also receives a \$40,000 BC gaming grant.

The largest earned revenue source came from tours and lectures, which generated nearly \$40,000 or 10% of revenues in 2017. Additionally, the Society earned 9% of its revenues from the gift shop and 5% from rental income.

The Society was also able to generate \$30,110 in donations in 2017. As 8% of revenues, this is the largest ratio of any of the organizations.

Interestingly, it was noted in the interviews that the Society operates without a dedicated fundraising committee, but has remained focused on generating revenues through specific grants and project-based crowdfunding initiatives. Other budget planning has focused on strengthening public services and generating revenue to support the growth and sustainability of the museum. The need for funding to develop a strategic plan was also noted in interviews.

The Society's 2017 expenditures totaled \$340,680 in 2017. Nearly-half of all expenditures (\$153,888) went to salaries and wages. With a staff of six, this equals \$25,648 in average labour costs. The gift shop costed the Society \$22,967, revealing a profit of nearly \$13,000. An additional expense

is repairs and maintenance which totaled \$22,103 in 2017 due in large part to a one-time roofing project.²⁸

Another notable expense is the more than \$15,000 spent in 2017 (greater than \$20,000 in 2016) on interest and loan charges. A note in the financials is provided below, however, interest and bank charges are high.

“In 2017, the Courtenay and District Museum’s total amount for bank charges was \$4,734. Normally this amount runs at around \$4,000. Approximately \$2,000 or half of this amount is merchant fees related to gift shop and program income at just over \$100,000. The other half comprises bank charges for four accounts and for four hundred and fifty dollars paid for monthly fees and an annual review related to the line of credit. Due to some one-time shifts: retirement and a major change in bookkeeping personnel in 2017, initiation of direct deposit for employees, cheque orders, and Capes Escape mortgage renewal, the average amount of \$4,000 for overall bank charges the museum normally experiences increased by \$734 in 2017.”

²⁸ For the roofing project, the society was able to raised \$4,000 through a crowdfunding campaign.

5.5 Comox Valley Community Arts Council (CVA)

Operations

At present, CVA identifies as being in between growth and maturation phases of its lifecycle. It has a clear sense of direction in its management and operations and a limited team who are ensuring member and community value. It is hindered by its space and battles against a lack of capacity to deliver its in-demand services.

Financial Management

A financial analysis was not included as part of the scope of this assessment as CVA is not a current cultural partner of the City. That said, CVA is punching above its weight on an operating budget of \$140,000 and derives benefits from many community partnerships.



6. Considerations and Recommendations



²⁹ CVAG: Artist John Powell at opening (Nump Ma Noch Gyai Yoo Lahss - We All Come From One Root) | Welcome Pole Ceremony - Fall, 2018 (in partnership with K'omoks First Nation and City of Courtenay)

Capacity: Ensuring Sustainable Levels of Core Services

Courtenay benefits from the four key arts and cultural assets reviewed above which are not only well-managed but are keeping up with current trends and practices in their respective fields, and demonstrating lead roles. While enjoying programmatic success, community relevancy, and improved resiliency of having moved their organizations through decline/turnaround, all four suffer from a lack of capacity to sustainably deliver their services at current funding levels in alignment with their respective City agreements.

RECOMMENDATIONS:

- That the City of Courtenay work towards supporting the **Sid Williams Civic Theatre** in the diversifying of its revenue base over three years by working with the Comox Valley Regional District in determining a funding formula to reflect the regional role of the theatre. The same could be considered for the other cultural partners though to a lesser extent given the wider engagement with performing arts.
- That the City of Courtenay create a new Fee for Service Agreement (FFSA) with the **Comox Valley Community Arts Council**, and in recognizing the regional service of

this key cultural asset, encourage increased financial contribution from the Comox Valley Regional District. The FFSA could see the third-partying of marketing for arts and culture in the region, acting as a convenor and facilitator to community groups and providing coordination with or on behalf of the City (and/or potentially the District). This can be achieved through building capacity in the community and region through its current professional development, training, resource and tool sharing programs, and other agreed-upon objectives and services. The FFSA would provide additional funding to assist in boosting CVA capacity by an additional 20 hours per week for the coordinator role on behalf of the City. The FFSA would offer stable multi-year funding and a move away from the uncertainty gaming funds. They also require the provision of further office and programming space. Funding sources could be leveraged through the hotel room tax.

- The City should consider an increase in multi-year core funding in order for **CVAG** to meet the objective of providing public education and outreach to the community which is falling short of its potential at this time.

- That the City of Courtenay help support the **Museum** in the diversifying of its revenue base (currently 44% City-contributed) by encouraging the development of a fundraising plan for the Courtenay and District Historical Society, and explore opportunities to work with the Courtenay and District Historical Society to minimize costs for financial services.

Marketing Investment: Enhancing participation

Three of the cultural organizations in Courtenay are spending less than 5% of their expenditures on advertising or promotion, with the Comox Valley Art Gallery Society and the Courtenay and District Historical Society each spending only ~\$8,500 annually.

According to the data-informed suggested formula of Marketing or 'Audience Acquisition Cost' (A) = Earned Revenue (12.5%),³⁰ both the Sid Williams Theatre Society and the Courtenay District Historical Society should be spending roughly-double their current spend while the Comox Valley Art Gallery Society should increase spending by 50%. Despite often being seen as an 'expense' that is not

central to operations, evidence suggests that spending on marketing should be seen instead as a wise investment providing a high-return.³¹

RECOMMENDATIONS:

- With the above in mind, the City may wish to consider an increase specifically to the cultural partner's marketing expenditures, and explore the possibility of centralized marketing and administration to promote efficiencies. This would provide the opportunity for a two-fold return as it may increase the earned revenue of the organizations (potentially reducing reliance on City grants), while also increasing awareness and use of these spaces by local residents.

Potential models could include matching support for organization's who choose to increase investment in marketing and promotion, or grants tied specifically to advertising related initiatives. This should be further explored in collaboration with regional partners in economic and tourism development.

³⁰ <https://www.colleendilen.com/2016/01/06/how-much-money-should-your-cultural-nonprofit-invest-in-getting-people-in-the-door-data/>

³¹ <https://www.colleendilen.com/2016/06/29/on-museum-layoffs-the-data-informed-importance-of-marketing-and-engagement-departments>

Maintaining Cultural Capital Assets

RECOMMENDATIONS:

- That the City of Courtenay work to support the Sid Williams Theatre in making an application to the Cultural Spaces Fund in order to help minimize rising costs for maintaining the aging building; and for upgrades and ticket surcharge use for maintenance.
- That the City of Courtenay work with all cultural partners in developing use of facilities plans, including the identification of use alternative and non-traditional spaces (e.g. gift shop pop ups).
- That the City of Courtenay further encourage cultural amenity contributions as part of the Developer Application Approval Process to help fund and maintain cultural infrastructure.

Business Planning, Monitoring, and Evaluation

Incentivize or support **all organizations** to improve their monitoring and evaluation, especially as it relates to 'making the case' for financial support (e.g., (S)ROI, impact evaluation).

RECOMMENDATIONS:

- Partner and work towards the development of a Cultural Scorecard to which cultural partners can reflect their work and measure performance outcomes.
- That the City provide partial funding every three to five years in its Operating Agreements to cover the expense of strategic planning for its Cultural Partners; and help build capacity and training in SROI and impact evaluation.
- That each organization provide a comparable baseline of wages for comparison purposes.

Future Directions and Models: Community Contribution Company and/or Regional Culture Commission

In an effort to reflect the regional nature of the arts and culture assets of the Theatre, Museum, Gallery and Arts Council, and in turn better serve the region as a whole, it's encouraged:

- That the City work with the Regional District, Town of Comox and Village of Cumberland in exploring the

development of an Inter -Municipal Working Group that would pay for a part-time community cultural liaison. This person would work with the respective governments and the arts and culture community of the region in its cultural development, including the exploration of a regional grants program for arts organizations, and the regular convening and facilitation of a future community-led Cultural Roundtable to minimize duplication, overlap between organizations and events, and improve calendarization and marketing, as well as collaboration and partnership opportunities.

- The City may also wish to explore a further consideration of centralizing the earned-revenue capacity of its cultural partners by examining the case for developing a community contribution company (C3) through which the four organizations could benefit from its profits. The City could, in keeping with its strengths, provide a space and business plan support for the development of the C3. C3s, a newer form of incorporation in the province, has both economic and social returns as guideposts and measures to company performance, and often align well with local government social innovation and procurement policies.

- The City may also wish to explore approaching the CVRD for a balanced funding formula which may arise through consultations within a cultural planning process.

Role of the City in Arts and Cultural Development

While the City has laid many foundation pieces to its cultural development, it now has an enhanced role to play thanks to the maturation and renewal of its cultural assets and a shifting community dynamic that sees an increasing expectation of cultural amenities.

What has remained unclear is the optimal role in the absence of a cultural plan to which arts and culture organizations (partners and non-partners), artists and volunteers, can align with and understand the City's overarching aims with respect to arts and cultural development; directions and measurable outcomes and performance. While the move towards business-planning through Operating Agreements has provided some assistance to cultural partners, the City may benefit following a cultural planning process, from the creation of a position of a community cultural manager (or through the above recommendation at a regional level) at a future date. The role would include a background and expertise in arts and cultural policy, planning and development (see Sechelt example) given the predominates of artists and arts and culture activity in the region and the many assets within the

City of Courtenay. A further consideration may be to encourage an integrated role of culture within City Hall and in overall community planning. Many local governments are migrating arts, culture and events services to other departments such as economic and tourism development and communications.

In order to determine its optimal role in arts and culture service delivery and development, a concluding

recommendation is for the City to carry out a cultural planning process which would include extensive engagement with the community, stakeholders and other governments in order to further understand demand and articulate its aims and directions over the next ten years. In the interim, the following table can serve as a guideline for the many roles the City currently has in arts and culture development and delivery.



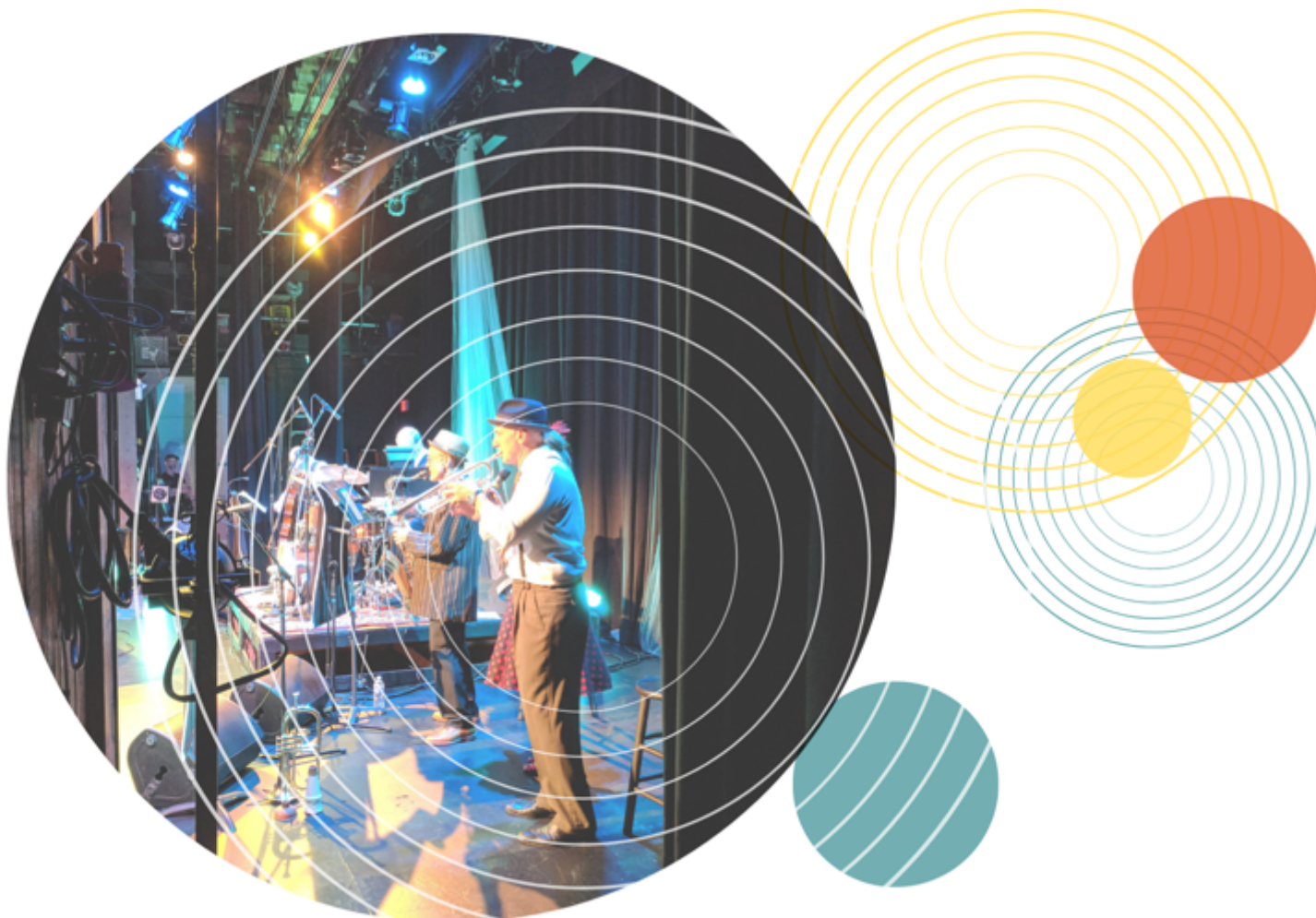
32

³² CVAG staff and volunteers

City Roles in Cultural Development

City Role	Current	Optimal or Desired	Strategic Plan Alignment	Expected Outcomes
Partner and Collaborator	Through three cultural partner agreements	Continue and optimize	Clearly reflected in Council's new Strategic Plan	Improved performance, efficiencies and capacity
Convenor and Facilitator	No	Unclear	More of a role to play	Minimize duplication; create efficiencies and bolster sector
Owner and Custodian	Yes	Continue and expand where appropriate, or divest where appropriate	Somewhat articulated through various staff reports and cultural partner agreements	Improved cultural resource management and development.
Funder	Yes, through grants and agreements	Continue and optimize	Yes	Optimized cultural resource management and performance; numerous direct and indirect community and sector benefits
Programmer	Yes, at recreation levels	Unclear	Unclear	Community benefit
Promoter/Advocate	Reflected in OCP and Strategic Priorities	Unclear on any future direction	Reflected in OCP and Strategic Priorities	Provides alignment for cultural partner business planning

7. Moving Forward



Short Term (Year 1):

- Initiate a new Fee-For-Service Agreement with the Comox Valley Community Arts Council including the introduction of a community liaison role
- Contribute towards the education and outreach position at the Comox Valley Art Gallery
- Explore the provisioning of additional space for the Comox Valley Art Gallery
- Support the Sid Williams Theatre in an application to the Canada Cultural Spaces Fund for support, and/or other grant sources.
- Work with the SWT and the Regional District in determining a funding formula to recognize and support the SWT as a regional asset. The same also applies to the other cultural partners though to a lesser extent due to the wider engagement with performing arts.
- Work with the Museum in diversifying its revenue base and identifying cost reductions.
- Begin scoping of cultural planning process by convening an Intermunicipal Cultural Working Group.

Medium Term (Year 2-3):

- Explore the development of an earned revenue stream and/or pooled charitable fund to benefit the four

cultural partners in order to minimize cannibalization of donor and earnings opportunities in a small marketplace.

- Explore the centralization of marketing and communications among cultural partners and the development of an arts marketing strategy for the area in conjunction with CVEDs and CVA.
- Work with all cultural partners in developing facilities plans, including the identification of use alternative and non-traditional spaces (e.g. gift shop pop ups).
- Collaborate with Cultural Partners on improved evaluations and measurement through the development of a cultural scorecard to incorporate into agreements.

Ongoing:

- Continue to maintain to a high standard all cultural infrastructure and City-owned or leased cultural assets.
- Continue to encourage and promote cultural amenity contributions as part of the Developer Application Approval Process to help fund and maintain cultural infrastructure.
- Continue to optimize all multi-year agreements with Cultural Partners as required to provide stability and capacity building in cultural development in the area.

APPENDIX A

Guiding Questions for Discussion

The following questions will act as a general guide for conversations with representatives from the City of Courtenay's client organizations. The questions are adjusted as required to suit the client identified below, based on the consultant's determination and will serve as 'prompts' for the initial intake. Interviews are encouraged to take place in-person where possible and can take the form of a group interview if preferred by the client organization.

As introduced to the interviewee, the objectives of the initial interview are primarily to:

1. Gather key information on the client organization in order to determine the appropriate needs and required services, and current working environment;
2. Connect with the client to establish a baseline of information for the City to help guide arts and culture development; and
3. May serve to help inform a future cultural planning process.

For client interviewees: Internal & Operating Environment

Prepared and adapted by Patricia Huntsman for the City of Courtenay. No distribution without written permission.

1. Where is your organization currently in its life cycle? (see attached Non-Profit Lifecycles*model table Key indicators: working vs governance board; established operations; main staff positions filled, etc... Start-Up; Growth; Established; Maturity; Turnaround; Decline/Extinction)
2. What are the KEY STRENGTHS and assets of your organization?
3. What are the KEY GAPS in Your organization as an organization and in terms of its activities?
4. What do you think are the Opportunities for the organization? What would you like to see be developed over the next 10 years?)
5. What are your aspirations or vision for your organization?
6. What is your understanding of the aims of the City of Courtenay in the areas of art and culture?

7. How do you think your organization contributes to the achievement of these aims? Does your strategic plan align with the City's aims?

³³8. Who do you have or wish to see as collaborators and partners for your organization? What do they offer that we are not? Where is there a fit?

9. Would your organization benefit from additional support from the City? In which particular areas?

Non-Profit Life Cycles Analysis

	Start Up Energy and passion are highest but systems generally lag far behind	Growth Program opportunity and audience demand exceed systems and operating capabilities	Mature Org has reputation for a steady production cycle, a relevant program, and a solid operation.	Decline Making status quo decisions based on internal factors.	Turnaround Taking decisive action to regain relevance and viability.
Programs	Simple, experimental; doing whatever might prove that artistic or cultural program can and should exist	Finding what is distinctive, developing a niche with a specific audience	Balance of favourite programs with audience resonance as well as of artistic/cultural renewal with playing it safe	Rigid, status quo; losing audiences to more relevant offerings	Being evaluated and modified in light of market viability; stakeholder input being sought.
Management	Leader is a 'spark plug' and the most experienced staff person; staff or contractors wear multiple hats	Staff battle against lack of time and constant sense of urgency; first intro of staff specialists that require competitive compensation	Second or third generation leadership, mgt perceived as leader among field peers, leader inspires confidence among all stakeholders	Committed to status quo, organizational slippage is ignored, mgt is trapped by commitment to programs	New leader is strong-willed w clear sense of direction; decisive and able to mobilize resources
Governance	Directors have personal connection to mission or founder, tend to defer board decisions to founder, do not view themselves in a governance role	Recruits from outside friends circle bring higher org performance expectations; board structure starting to appear	Board sets direction, leaves mgt to leader; is organized for maximum effectiveness; keeps mandate focused and vital	Board only takes action when money starts to run out; not focused on community response to org	A core is ready to do what it takes to restore org integrity; non-committed members are gone
Resources	Low-budget, boot-strap operation, budget is the sole financial document, operating on a cash rather than accrual basis	Income sources diversifying; more sophisticated financial management systems are needed	Multiple sources of income; reasonably accurate financial forecasting and deficits generally avoided	Averse to cutting expenses; income forecasts based on the past, if asset-rich looking to prior earnings to cover current costs	Financial crisis may have been the trigger point therefore often short of cash; willingness to cut expenses to reflect reality
Systems	Finance and admin functions and systems are generally weak or are outsourced	Systems of all types must now be improved to meet demands of prog expansion, more fundraising, marketing	Regular communication systems exist w/in the org and with publics, admin systems support timely decision making	Antiquated and physical space may be deteriorating; systems haven't kept up with the times	Existing may be too complicated and expensive for turnaround stage
Adapted for small-medium arts and culture organizations by Kathleen Speakman from Susan Kenny Stevens Non-Profit Lifecycles: Stage-based wisdom for non-profit capacity.					

APPENDIX B: Full Case Studies (Jurisdictional Comparisons)

In view of their recognition of arts and culture in contributing to a higher quality of life, thriving creative economies, and growing cultural tourist destinations, the City of Revelstoke, B.C., Maple Ridge B.C., and the Town Aroua, ON's cultural strategies were considered in terms of their relevant policies and practices, size and target groups, and collaborations/partnerships. Like the City of Courtenay, each of these municipalities are home to a vibrant arts and culture community with several museums, art galleries, and theatres, as well as cultural activities and events occurring throughout the year.

The City of Revelstoke, BC

The City of Revelstoke's [Parks, Recreation and Culture Master Plan \(2011-2021\)](#)³⁴ seeks to provide guidance and direction for managing parks, recreational and cultural facilities, resources, programs, infrastructure and investment over a period of 10 years. The Master Plan consists of 54 recommendations, which focus on parks facilities, trail development, facilities, recreation, culture, and implementation.

Under the Department of Parks, Recreation and Culture's budget, the City offers financial and in-kind support to arts, culture, and heritage organization and programs within the city. The Director of Parks Recreation and Culture works with the staff liaison of the Public Art Committee, which provides City Council with advice and recommendations with respect to selecting and installing public art projects. The City owns many facilities, operated by the City or by a non-profit organization, such as the Revelstoke Community Centre, Aquatics Facility, and Visual Arts Centre

³⁴ http://www.cityofrevelstoke.com/DocumentCenter/View/344/Parks-Rec-and-Culture-Master-Plan-Final_083011?bidId

Recommendations relating to recreation and culture includes:

- Coordinate Youth Engagement Initiatives – develop new programs at its facilities for youth by working together with a variety of community agencies and the School District, support non-profit community programs, increase quality and variety of recreation and culture program for all ages, and continue to offer subsidies to low-income families.
- Increase the Number and Variety of Recreation and Culture Programs – work with community agencies to increase programming, support youth programs through services in-kind, space, equipment, etc., and continue to offer low-cost swimming and skating for low-income families.
- Develop Health, Fitness, Arts & Culture for Older Adults – with the number of seniors increasing in Revelstoke, the Master Plan recommends ensuring older adults have access to a variety of programs in the Community Centre and Seniors Centre. In particular, the recommendation highlights the need to work with the Visual Arts Centre and Revelstoke Arts Council to provide programs that appeal to older adults interested in arts and culture.
- Update the 2006 Culture Strategy – Created in 2006, the Culture Strategy was never adopted as council policy. The recommendations emphasize the need to update the culture policy to reflect contemporary circumstances through a 10-year plan.
- Inventory of Culturally Significant Sites – Public survey results showed support for protecting culturally significant sites. The recommendations urged working with First Nations, community organizations, other levels of government, and industry to prepare an inventory of culturally significant sites for protection and promotion.
- Improve Coordination with Recreation, Arts, and Culture Service Providers – The City of Revelstoke and surrounding areas are served by a significant number of non-profit and government organizations providing a variety of arts and culture services. The recommendations included initiating quarterly meetings with recreation, arts, and culture service providers. They also called for investigating opportunities for collaboration for program delivery and grant opportunities.

Other related initiatives that were recommended for the City of Revelstoke included an updated system for program registration and bookings, a review of the existing fees and charges, and an analysis of staffing levels.

The strategy from Revelstoke is relevant to Courtenay because of the City's focus in ensuring there is a diversity of recreational and cultural programming for all ages, including youth and seniors. Furthermore, it highlights the need for the City to work with community agencies in the delivery of the program, which could include in-kind support, space, equipment, etc. For example, to increase the number of youth programming, the City could work with community agencies and the School District. The recommendations also highlight the need to coordinate and collaborate among the various non-profit and government organizations to ensure effective use of limited resource, improve information sharing and the provision of coordinated programs and services. Not only would this would improve access to expertise within the City, but access to grants as well.

The City of Maple Ridge, BC

The City of Maple Ridge's [Culture Plan: Walking Together](http://mapleridge.ca/DocumentCenter/View/16527/Maple-Ridge-Culture-Plan)³⁵ outlines the strategic direction for advancing and investing the City's cultural development, including arts services; festivals and events; programs; and facilities. The City sought to create a plan using a place-based approach that would strengthen, harmonize and raise the profile of the City's cultural endeavors to create a unique identity, with opportunities for placemaking, and the celebration of the community's diverse heritage and culture.

The Culture Plan aims to be a living document that serves as a roadmap to guide the development of the arts, culture, and heritage for the next 10 years. The Culture Plan seeks to involve and empower the community to improve access to and use of culture facilities; support arts and culture organizations to meet the needs of a changing community; enhance service delivery through public and private partnership, and establish processes to guide arts and culture service delivery.

³⁵ <http://mapleridge.ca/DocumentCenter/View/16527/Maple-Ridge-Culture-Plan>

The City of Maple Ridge's Culture Plan outlines six strategic priorities:

- Connection, Capacity and Collaboration – Through the City's strategic direction, department, bylaws, policies and programs, the City recognized it had a role to play in capacity-building. Moreover, the recommendations also seek to invest in capacity-building and foster collaborations through knowledge-sharing, gatherings, and skills development opportunities for volunteers and administration; and work with neighborhoods to encourage a distributed model of arts, culture and heritage activity and connection points.
- Awareness & Visibility – In order to value, celebrate, and integrate arts and culture into community life, the Culture Plan emphasizes the need to develop and implement a comprehensive art and culture communications strategy to build audiences and awareness. Moreover, it highlights the need to celebrate Maple Ridge's story and sense of place, which includes expanding the Public Art Program and expanding support for the Artist-in-Resident Program.
- Culture Tourism & Creative Entrepreneurship – In order to be recognized as an all-season cultural tourism destination and home to a thriving creative industry, the Culture Plan emphasizes the need to continue to

enhance understanding amongst stakeholders and decisionmakers on the value of arts, culture and heritage and the creative community as part of Maple Ridge's tourism attraction and destination branding. The Culture Plan also highlights the need to leverage local cultural resources and assets to distinguish Maple Ridge as a cultural destination; further integrate creative economy strategies into economic development planning; and work with creative entrepreneurs on skills developments.

- Youth & Family Arts – As participants and producers of art, young people and families are active and involved in the arts. The Culture Plan recognizes the need to address barriers and develop mechanisms which will allow access for youth and children and encourage family participation. It also highlights the need to create and develop ways to nurture and celebrate the ambition, enthusiasm, and talent of local children and youth in the arts; increase city-wide family arts opportunities; and sustain a youth and family arts sector and initiatives by developing capacity in the community.
- Indigenous Cultural Heritage & Arts – To increase understanding of the rich cultural heritage of the Katzie and Kwantlen peoples, and increase opportunities for Indigenous contemporary arts practice more generally,

the Culture Plan highlights the need to ensure that Indigenous voices and stories are reflected in on-going cultural planning; build connections between the local Indigenous communities and the broader Maple Ridge community through art; and support efforts to reconnect and preserve language and place names.

- Multiculturalism and Social Inclusion – To ensure everyone feels they can participate in the cultural life, the Culture Plan emphasizes the need to foster an understanding that community identity and wellness are enhanced and strengthened by diversity and inclusive participation; promote social change arts practices, and arts-based strategies for addressing matters of civic importance; and celebrate Maple Ridge’s rich ethnic and cultural diversity, and heritage legacy through culinary-arts and music based festivals and events.

The strategy from Maple Ridge is relevant to Courtenay because of the comparable understanding of the role cities plays in advancing cultural life for its residents. With a vision of growing community through culture, Maple Ridge’s Culture Plan emphasizes the need to ensure everyone feels they can participate in the cultural life of the city. To strengthen diversity and inclusion, the Culture Plan emphasizes the need to continue engagement and dialogue with the multicultural community; youth, seniors, new

residents, immigrants, people with disabilities and the LGBTQ2S+ and gender diverse community. In particular, the Culture Plan highlights that culture can be a tool to enhance dialogue and opportunities for marginalized communities through inclusivity initiatives, such as ticketed access, free events, and programs with identified partners. By working with relevant community organizations, the creation of a community Arts Cultural Accessibility Fund would also help minimize barriers for these communities to partake in the cultural life of the city.

To ensure there is continual dialogue, the City acknowledges it can play a role in convening a Cultural Leadership Roundtable meeting that provides an opportunity for collaboration, information-sharing, and event coordination. Membership at the Cultural Roundtable would include representation from arts and culture organizations, Indigenous communities, and the City’s tourism and economic development division. To support the City’s planning process, the Cultural Roundtable would be a strong resource to assist with the planning and implementation of programs and initiatives.

Most importantly, the plan recognizes the need to integrate culture strategically within City Hall particularly in economic development and tourism planning. While the cultural manager role is still housed with Parks, Recreation and

Culture, a lot of interdepartmental team work has been advanced over the past two years to ensure a cultural lens is adding value to City planning. This is an important marker in cultural development—to see the shift from a programmatic lens to strategic— in achieving the City’s broader goals.

The Town of Aurora, Ont.

The Town of Aurora’s [Culture Master Plan \(2014-2019\)](https://www.aurora.ca/Thingstodo/Documents/2014-05-20%20staff%20report%20pr14-022%20attachment%201.pdf)³⁶ provides a strategy to leverage local culture resources to grow the economy, to improve quality of life, and to build and sustain a sense of community cohesion and pride. The Culture Master Plan was developed by a Working Group appointed by Council, comprised of representatives from the City and individuals representing a range of cultural, community, and business interests. The Culture Plan was developed through an extensive engagement process to ensure the direction and priorities reflect the community’s ideas as well as the City’s needs and opportunities.

The Culture Master Plan is built on four strategic directions with recommended actions:

- Define the Municipality’s Role and Build Partnership – emphasizes addressing administrative and resource requirements to implement the plan; and build and sustain public, private and community partnership.
- Expand Culture’s Role in Economic Development – highlights the need to leverage cultural and heritage resources to support downtown revitalization, to grow Aurora’s creative cultural industries; and expand tourism.
- Build a Strong and Vital Cultural Sector – emphasizes the need to strengthen collaboration among cultural and heritage groups; to increase awareness of cultural resources; and to build on current activities to strengthen festival and events.
- Enhance Access to Cultural Resources – highlights the need to respond to the cultural aspiration of an increasingly diverse community; to promote participation in cultural activities from across the community; and to address the needs of youth and seniors in the community.

³⁶ <https://www.aurora.ca/Thingstodo/Documents/2014-05-20%20staff%20report%20pr14-022%20attachment%201.pdf>

The strategy from the Town of Aurora is relevant to Courtenay because a thriving cultural community depends on public, private, and community partnerships. To build and sustain these partnerships, the Culture Master Plan recommends the recruitment of champions from the community to act as advocates to support the implementation of the Cultural Master Plan and ongoing cultural development. Furthermore, it also recommends the creation of a Community Leadership Group that supports the implementation of the Cultural Master Plan, but also seeks to find solutions to problems. The creation of an Annual Cultural Summit is also recommended, which provides an opportunity for business and community leaders to explore opportunities and challenges a thriving cultural community. Members of the community-at-large and cultural stakeholders are then well positioned to review the progress of the implementation of the Cultural Master Plan and identify new opportunities and initiatives. Furthermore, the Summit can be a platform for striking task-based working groups to advance cultural issues and initiatives.

³⁷ <http://www.salmonarm.ca/documentcenter/view/641>

City of Salmon Arm, BC

The Official Community Plan characterizes the town as “lifestyle-oriented” in their focus on the quality and quantity of arts, culture and community activities, services, and facilities. The scenic backdrop of Shuswap lake and surrounding mountains frames the historic town of 17,706 residents.

The Community Plan recommends a facility focus on promoting heritage protection, recreation, and parks. The report recognizes a thriving volunteer culture (such as the OHS members who support the museum and archives) and that there’s growing interest in the region’s Heritage.

The Community Plan and Strategic Plan offer the following notable approaches to arts and culture:

- Develop Facilities for Culture and Recreation – the public survey in the 2013 Strategic Plan³⁷ called for a medium-term goal for a multi-use community arts center. Early plans for funding included a partnership with community organizations, the City, and the Province and that the city would have an indirect roll in these projects.

- [Establish the City's roll in Heritage Conservation](#)³⁸ – The 2009 Heritage Strategy called for adaptive re-use of historic buildings.
- To achieve this, it requires:
 1. The identification of heritage resources in planning reports and local land use plans.
 2. Measures to retain and utilize buildings to meet civic goals
 3. Identify and mediate the impact of proposed land use changes on these assets. (p.27)
- [Identify, Promote, Preserve, and Protect Heritage Resources](#)³⁹ – To achieve this goal, the report recommends the use of mapping and planning tools to identify and protect heritage resources on public and private land. This includes planning policies that encourage new development to respect buildings, sites, and features with heritage significance. It also calls for increased support of the R.J. Haney Heritage Village and Museum, Salmon Arm Art Gallery, and the Old Court House façade. (p.127)

³⁸ <http://www.salmonarm.ca/DocumentCenter/View/108>

- Official Community Plan Review – The City of Salmon Arm recognizes that the official community plan was last made in 2011 and requires a review now that a decade has almost passed.
- Develop a Cultural Master Plan – The City of Salmon Arm has made a long-range intention to develop an arts and cultural master plan, and in-depth heritage strategy, which was noted in their 2013 Strategic Plan. They aim to develop a comprehensive review, following their 2011 Official Community Plan, between (2016 and 2021). The Heritage Strategy (2009) recommends working collaboratively on Indigenous cultural projects.
- Overcome Barriers to Support – While the 2011 Community Plan speaks optimistically about the volunteer culture, the 2009 Heritage report highlights that some arts and cultural organizations feel pressure to develop and implement policy, achieve operational costs and recruit volunteers.

In terms of cultural assets and resources the following events and venues are named in the 2011 Community Plan:

³⁹ <http://www.salmonarm.ca/DocumentCenter/View/52>

- The Salmon Arm Art Gallery
- The Salmar Theatre and Film Festival
- The Roots and Blues Festival
- Wednesdays on the Wharf
- The Ross Street Plaza Performances
- The Salmon Arm Museum and Archives
- R.J. Haney Heritage Village and Museum

Noted Heritage and Conservation Sites

- Haney Heritage House
- Art Gallery – 70 Hudson Ave. N.E
- The Train Station, Art Gallery, and Old Court House Façade – downtown core
- Salmon Arm Bay, the Shuswap Lake foreshore
- Greenway Plan (in the OCP)
- Protection of Orchard Houses
- Zoning Developed to create and protect the Turner Creek Trail

Noted Sources of Support

- Grants from the Shuswap District Arts Council
- Shuswap Art Gallery Association (SAGA) and Public Art Gallery
- Donations from Historian and OHS life member Denis Marshall
- Shuswap District Arts Council

Budgeting for Arts and Culture

The 2019 consolidated expenditure budget for recreation and cultural services is set to increase year over year; the 2019 budget goal is \$4,569,385 and the 2023 goal is \$4,946,049. This reflects a 5-year increase of \$376,664. Within this budget, the Recreation Centre typically receives 3 million.

Recreation and Cultural Services 5-Year Operating Budget

2019	2020	2021	2022	2023
4,569,385	4,660,773	4,753,988	4,849,068	4,946,049

Source: City of Salmon Arm 2019-2023 FP Bylaw (Op)⁴⁰

Recreation and Cultural Services 5-year Departmental Summary (Capital)

2019	2020	2021	2022	2023
944,485	333,334	1,235,030	335,592	319,871

Source: City of Salmon Arm 2019-2023 FP Bylaw⁴¹

The strategy from Salmon Arm is relevant to Courtenay because of their comparable regional geography, and their third-party delivery of arts and cultural services through a fee-for-service agreement (FFSA).

The City provides annual support funding through a fee-for-service arrangement with the following organizations.

The following reflects the 2019 budget:

- The Salmon Arm Museum and Archives - \$80,000
- The Trial Alliance - \$50,000
- The Roots and Blues Festival - \$90,000
- The Salmon Arm Arts Centre - \$41,000 (+\$6,000 increase for 2019)

The contract is for a 3-year term and outlines the following terms for service delivery:

- General advice on Arts and Culture issues as requested by Council;
- Exhibitions, opening receptions and artist talks;
- Wednesday On the Wharf: summer concert series;
- Arts programming for young families, children and youth;
- Arts outreach programs for the public;
- Education programs for local schools and groups;
- Arts referral and support services;
- Meeting and working studio spaces for individuals and cultural groups.

⁴⁰ <https://www.salmonarm.ca/AgendaCenter/ViewFile/Agenda/01072019-499>

⁴¹ <https://www.salmonarm.ca/AgendaCenter/ViewFile/Agenda/01072019-499>

The City of Nelson, BC

Nelson is characterized by its waterways, mountain vistas, a charming downtown core, quality recreation facilities and opportunities. The [2015 – 2018 Strategic Plan](#) highlights councils' intention for a 3-year focus on a solution centered goals they aimed to deliver during their term.

In the plan, the Mayor and Council recognize that it's Nelson's residents that inspire the City's vibrant, unique, and charming character. They intended that the plan offer a milestone in the City's ongoing strategic engagement and planning process, aimed at strengthening business, cultural and community relationships.

The plan concisely profiles current strategic goals and in-progress actions to achieve them. As an aspect of the following missions - to enhance the sustainability of city services and infrastructure and to expand local jobs and local prosperity - they set the following intentions for their approach to delivering arts and culture in Nelson:

- Public Art & Renewal – Public art seen as a means to beautify streets and spaces, which rely on design to attract investment and improve quality of life. To host key community events and festivals the city recognizes that park spaces and venue need increased capacity (p.13).

- Partnerships to Deliver Culture – Culture and recreation are vital to the region's economic growth, and the plan encourages strategic partnerships to host and deliver vibrant events, festivals, and business development opportunities. Essential for program delivery, relationships with businesses, community groups and government organizations is crucial (p.14). The [Regional District of Central Kootenay's 2016 Recreation & Culture Master Plan](#) also profiles Nelson and emphasizes that developing partnerships, with providers of recreation and cultural programming, is critical for delivery.

Relevant to Courtenay is the administrative approach and responsibility the city's taken to its arts and cultural programs. As a municipality, the City works to engage multiple stakeholders, with the support of a planning committee such as the CDC (Cultural Development Committee) that meets monthly to offer high-level strategic approaches to further heritage, creativity, diversity, and excellence in Nelson's lifestyle.

The committee has developed a range of [publicly available](#) policy, bylaw, and reference documents to guide and shape the cultural sector. These documents, are intended to guide

the working groups, that coordinate the city's festival, heritage, and public art programs.

The strategic plan is timeline and goal oriented and developed with political sensitivity, to the 4-year term the mayor and council has in office.

The Recreation Master Plan recommends that the Nelson and District Recreation Commission preserve, maintain, and manage important indoor and outdoor spaces in a manner that supports community participation (p.16). Vital recreation, cultural programming, and studio space are offered through the city-owned youth center and also the civic center. Within the Recreation Master Plan Nelson's special events (64%) are cited as a leading facility use (p.104).

The City of Sechelt, BC

Sechelt is a scenic coastal community of 10,000 residents, located on the lower Sunshine Coast, 50 km northwest of Vancouver. Sechelt represents 20 years of arts and cultural

driven policy and planning and offers a heritage focused legacy that extends to their foundation in the 1880s.

The following 5 approaches are recommended in their 2011 Arts, Culture, and Heritage Strategic Plan:⁴²

- Importance of Arts Culture and Heritage – To support Sechelt's diverse community arts and cultural programs, council members are asked to demonstrate a belief in the importance of this sector to the economy, social health, and community development of the District.
- Advisory Committee – Council appoints qualified members to a citizen-based arts, culture, and heritage committee. This group is tasked with seeking grants, and furthering relationships with arts, culture, and heritage groups, and advising the council on their recommendations. The committee is tasked with all revisions to the Arts, Culture, and Heritage Strategic Plan and hosting an annual open house that invites and offers public presentations and discussions regarding arts, culture, and heritage.

⁴²

<http://www.sechelt.ca/Portals/0/public%20document%20library/Committees/>

[arts,%20culture%20and%20heritage%20advisory/Arts,%20Culture%20and%20Heritage%20Strategic%20Plan%20-%20Amended%20Sept%202011.pdf](http://www.sechelt.ca/Portals/0/public%20document%20library/Committees/arts,%20culture%20and%20heritage%20advisory/Arts,%20Culture%20and%20Heritage%20Strategic%20Plan%20-%20Amended%20Sept%202011.pdf)

- Celebrating Community – The Policy recognizes the value of collaborating with cultural groups, and that the City has a role in generating public visibility of events and other programming. Cultural providers are characterized as valuable resources; education providers and businesses are encouraged to focus on promoting cultural tourism and arts-friendly development. Developers are asked to treat public art like other community amenities.
- Facilities – Council is required to develop a long-term plan for the creation, preservation and use of Arts, Cultural, and heritage facilities. This includes artifacts, written and taped histories, pictures and additional properties. This includes a focus on Rockwood Lodge and updates to the heritage inventory.
- Budget – A specific budget account recognizes the council's support for arts, culture, and heritage is annually reviewed. Any needs, opportunities, and growth is done with sensitivity to broader regional impacts and initiatives. Partnership with the Sunshine Coast Regional District is recommended to coordinate any inter-regional goals.

In 2012, to administer their mandate, the City hired an Arts, Culture and Communications Coordinator to oversee cultural workshops, community consultation and mapping, public art, heritage, and cultural events. The City's website also offers a public-facing resource center that highlights the planning process and relevant engagement events. They also offer a public art collection, that's on display year-round; it showcases works dating to 1902. Vital annual events and guides available via the website include festivals that focus on the Written Arts, Summer Music Series, Farmers' and Artisans' Markets, and the Sunshine Coast Art Crawl.

The strategy from Sechelt is relevant to Courtenay because of the role the city took to recognize the community's grass roots creativity and pro-arts advocacy and hire a coordinator to support municipal and regional arts planning. Courtenay also has inter-regional considerations; it's at the core of the Comox Valley Regional District which includes communities such as Comox, and Cumberland, Hornby, and Denman Island. To address this the Sunshine Coast Regional Cultural Strategy was published in April 2007 following the Sunshine Coast Regional District Regional Cultural Scan released June 30, 2006.





THE CORPORATION OF THE CITY OF COURTENAY

BRIEFING NOTE

To: Council
From: Chief Administrative Officer
Subject: City and Downtown BIA wayfinding proposal

File No.: 6950-04
Date: November 25, 2019

ISSUE:

This Briefing Note provides an overview of the wayfinding manuals developed for Downtown Courtenay as well as City of Courtenay Parks and Municipal Facilities.

BACKGROUND:

Earlier this year staff initiated a wayfinding strategy with the Downtown Courtenay Business Improvement Association (BIA). The BIA had some funding to create a handful of wayfinding signs and sought input from the City. “Developing a wayfinding signage strategy that directs people to and around downtown” is an action identified in the *Downtown Courtenay Playbook: A Partnership Action Plan (2016)*, therefore staff collaborated with the BIA to create a more fulsome wayfinding approach. Lime Design Inc. was retained to provide consultation services, who also created the now implemented wayfinding strategy for Downtown Comox, as well as the Village of Cumberland’s signage guidelines.

Staff were aware that existing parks and municipal facilities signage would be evaluated for coordination with the newly created downtown signage and that wayfinding guidelines are needed for these public signs as well. The Request for Proposals for the consulting services therefore included that a parks and municipal facilities signage strategy also be developed concurrently given the economies of scale of producing both.

KEY CONSIDERATIONS:

The *Downtown Courtenay Wayfinding Manual* is included in **Attachment No.1**. The *Parks and Municipal Facilities Wayfinding Manual* is included in **Attachment No.2**. Both documents provide an overview of the value and considerations of wayfinding, selections of existing wayfinding assets, and proposes sign categories for each the downtown as well as wider municipal parks, trails and facility applications. For all wayfinding concepts, the consultant worked with staff to identify suitable, durable, easy to maintain and cost effective materials and maintenance strategies which are incorporated into the design of the signs.

The BIA guided the creation of the downtown wayfinding concepts and has indicated strong support for the proposal. Installation considerations were evaluated by operations staff, BIA and the consultant during concept design and all concepts are technically feasible, although will require further engineering design prior to installation.

Recreation and Cultural Services Department and Parks Division staff guided the creation of the parks and municipal facilities wayfinding concepts. Installation considerations were not considered in detail, although

given that the family of signs proposed utilizes similar installation apparatus to existing signage assets, or is similar to the new proposed downtown signs, installation is considered to be feasible for all signs proposed.

Staff are currently considering downtown wayfinding signage installation as part of 2020 budget deliberations. The BIA has indicated that \$5,000 is available from their sources to contribute to capital costs. 2020 marks the 25th Anniversary of the Downtown Courtenay BIA and the 50th Anniversary of the summer Market Days making it an ideal year to implement the new signage.



Nancy Gothard, MCIP, RPP
Policy Planner

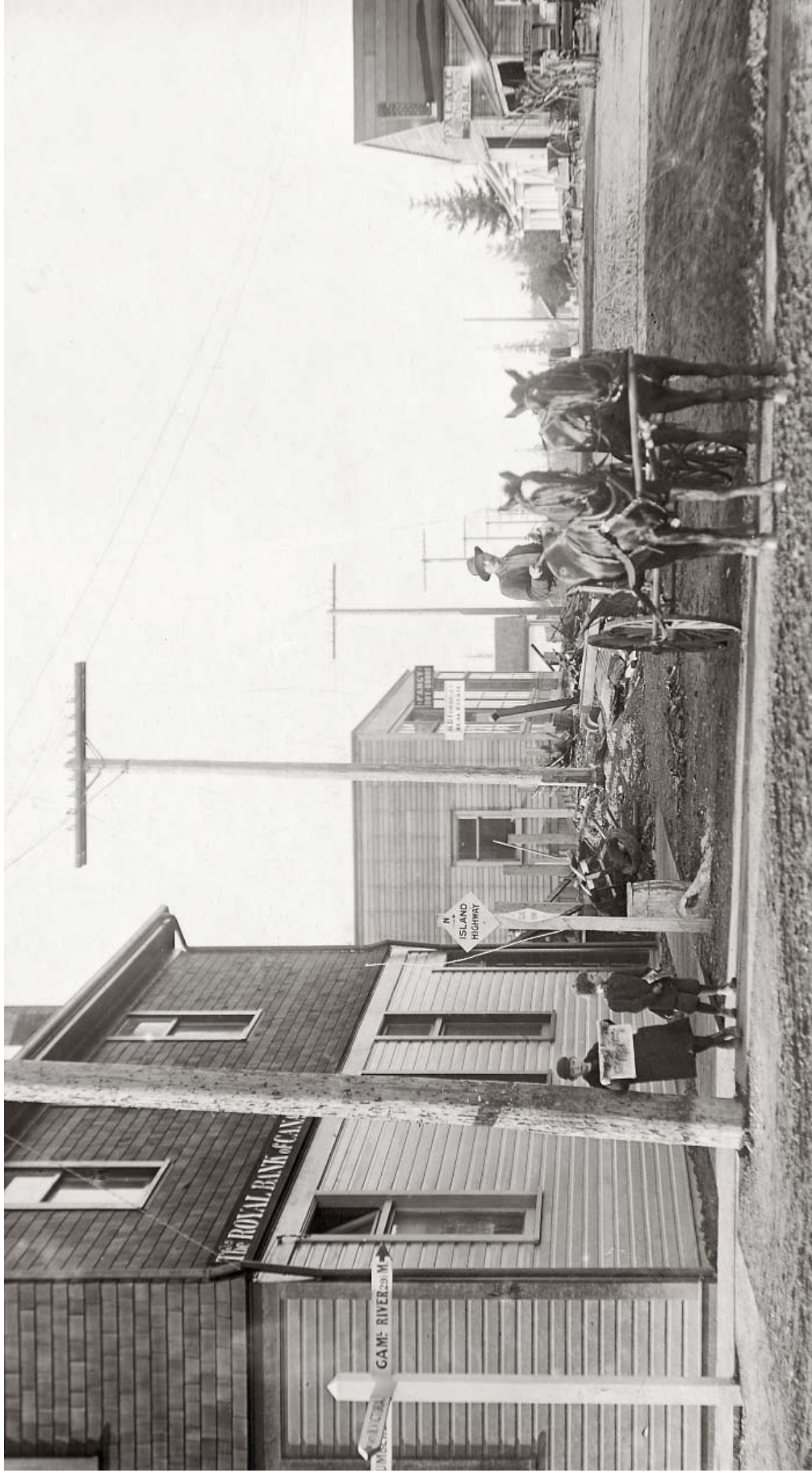


Ian Buck, MCIP, RPP
Director of Development Services

DOWNTOWN COURTENAY WAYFINDING MANUAL

NOVEMBER 2019 FINAL DRAFT





Corner of Cliffe Avenue and 5th Street, c. 1913
Courtenay & District Museum Archives, 2004.11.1

Some directional wayfinding elements shown in the foreground



**1.0
INTRODUCTION /
BACKGROUND /
CONTEXT**

**2.0
WAYFINDING
CONSIDERATIONS**

**3.0
DOWNTOWN
WAYFINDING ELEMENTS
& HIERARCHY**

**4.0
STREET PYLON
CATALOGUE**

Why Wayfinding 6
Objectives / Goals 7
About the Location 8
Initial Action Plan Documentation 9
Existing Signage / Elements 10
Downtown Courtenay Aerial Photo 18
Landmarks and Corridors Map 19

Signage Categories 21
What is Interpretation? 22
Steps to Content Development 23

A New Strategy for Wayfinding 25
The Downtown Wayfinding Family .. 26
Downtown Entrance Markers 27
Downtown Street Pylons 28
Core Street Identifiers 30
Identity Elements 32
Downtown Directories 34
Placement Matrix 35
Coexisting Municipal & BIA Brands... 36
The Elements 37
Branding Usage (City / BIA) 37
Brand Colours 38
Directional Elements 39
Typography 40

Pylons 4.1-6.3 41



Native Sons Hall on Cliffe Avenue, Fall 2018
An iconic building in Downtown Courtenay that lends itself well to wayfinding by virtue of being distinctive.



1.0 INTRODUCTION BACKGROUND CONTEXT

Why Wayfinding?

Why develop a wayfinding strategy for Downtown Courtenay?

There are numerous advantages to utilizing a strategy for wayfinding. Here are the most important benefits which apply to numerous contexts.

Consistency & Safety

Consistent signage is predictable and intuitive. It carries important safety messages that are crucial for all visitors. Consistency and clarity reduces the time it takes to learn the system.

Putting Tax Dollars to Work

Residents would like to know how their tax dollars are applied. Effective wayfinding is a tangible asset that identifies other community assets that may not be obvious. For example, parks and facilities that do not have distinctive or extensive frontages.

Increasing Resident Awareness

Wayfinding can increase residents' awareness of their community resulting in a familiar, easy to navigate, highly-visited downtown and adjoining parks, traffic corridors, trails and greenways.

Putting the Municipality on the Map

A clear identity and attractive wayfinding elements are often key indicators of a community's pride and confidence. The feedback in other communities with wayfinding strategies is often a noticeable increase in visitation and revenue.

Helping Tourists to Navigate

A cohesive signage system enables visitors to navigate the downtown, important community destinations, commercial areas, public spaces, parks and trails with ease and greater enjoyment. This experience increases visitor satisfaction and may lead to repeat visitation. Often it has a promotional effect as well. Visitors recommend destinations because they enjoyed the experience and would like to share it.



Project Objectives / Goals

Objectives

The objective of this **Downtown Courtenay Wayfinding Manual** is “to provide the City with a Wayfinding Signage Strategy to direct residents and tourists to downtown Courtenay from key travel decision- points within Courtenay’s transportation network, as well as orientate within the downtown.” (RFP document, January 2019)

A Downtown Wayfinding strategy was initiated to fulfill goals of the **Downtown Courtenay Playbook: A Partnership Action Plan (2016)**, and in support of Downtown Courtenay Business Improvement Association (BIA) current priorities. Upon exploring wayfinding goals for the downtown, it was discovered that coordination with wider municipal wayfinding would be critical to its success. The project for the downtown wayfinding was therefore expanded to include a wayfinding strategy for parks and municipal facilities as well, which is documented separately in the **Parks and Municipal Facilities Wayfinding Manual (2019)**.

The scope includes:

- documentation and evaluation of existing downtown signage
- recommendations for sign categories, theme, character and hierarchies in the Courtenay downtown area
- development of a set of downtown signs that

aim to draw attention to the downtown core and promote its features

- coordination of downtown signage themes with parks and municipal facility signage theme, character and hierarchy.

Goals

The following goals were identified at the initiation of this project:

- increase visitor-friendliness
- improve orientation
- increase visitation (day / overnight)
- raise awareness and appreciation of municipal features
- increase downtown business revenue through revitalization
- develop a look and feel to market the features of the municipality to the local and regional audience
- make Courtenay a destination
- implementation of Downtown Courtenay Playbook wayfinding recommendations

The Downtown Wayfinding Strategy Manual

was developed in consultation with the Downtown Courtenay Business Improvement Association.



Downtown Courtenay, 5th Street looking east, Fall 2018.



About the Location

Location

Located on the east coast of Vancouver Island in British Columbia, the city of Courtenay is approximately one-hour drive north of Nanaimo. Courtenay is the largest community in the Comox Valley and is part of the Comox Valley Regional District.

Brief History

From archaeological evidence we know that there was an active Coast Salish fishing village close to the Courtenay River estuary about 4,000 years ago. Courtenay was named after the captain of the HMS Constance, which frequented the area. Early settlers arrived in 1862 and started farming on the east side of the river. After the first bridge was built by Joseph McPhee, development on the higher ground of the river's west side began with a sawmill. A coal mine opened up in nearby Union Bay in 1888 by Robert Dunsmuir. This industry brought a large number of new people to the region, including Japanese and Chinese immigrants.

Downtown Courtenay

The downtown area of Courtenay features a number of surviving historic buildings, but many were replaced after a fire in 1915. Today, the actual area of the downtown commercial core is quite small, spanning from 4th to 6th Streets and from Cliffe to Fitzgerald Avenues.

Business Improvement Association (BIA)

The Downtown Courtenay Business Improvement Association was formed in 1995 with the goal to provide the business community with leadership. Its mission is to maintain the vibrant and responsive nature of the Downtown Courtenay Business Improvement Area for its 240 members (as of 2019) and the general public while remaining on the leading edge of change. BIA members include retail and professional services, restaurants and cafes, property owners, arts and cultural venues and more.

"A volunteer Board of Directors, together with a part time Executive Director and DCBIA members, work tirelessly on developing internal and external marketing strategies to attract people to the downtown core." (BIA website, 2019)

City of Courtenay

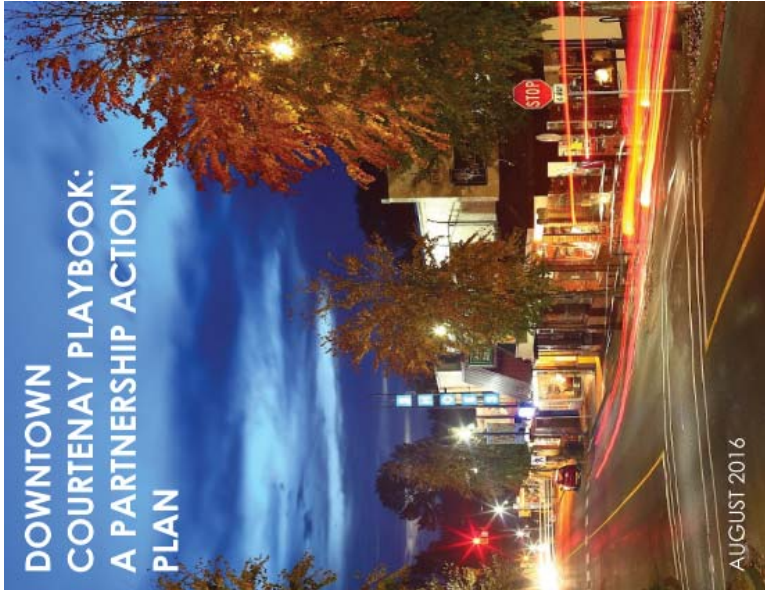
"The City of Courtenay is situated on the east coast of central Vancouver Island, within the traditional lands of the Kómoks First Nation. Accessible by land, sea or air, Courtenay is a culturally diverse community that offers supernatural beauty at its doorstep. The City of Courtenay (approximate population 25,000) is the urban and cultural hub of the larger community, the Comox Valley (approximate population 65,000).

Courtenay is an innovative, vibrant and growing city that works together to provide opportunities and excellent services making our community a great place to live, work and do business.

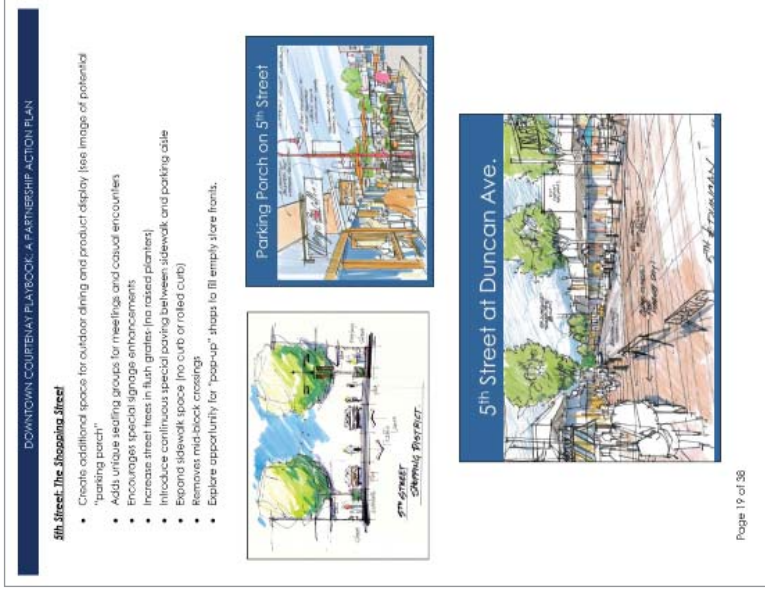
With many beaches, rivers, and lakes; Mt. Washington Ski and Alpine Resort; and world class golfing, the Comox Valley is known for its year-round recreation and sports opportunities. This is one of few places in the world where you may go ocean kayaking in the morning, cycle at lunch, downhill ski in the afternoon ... and then end your day dining at a five-star restaurant or simply enjoying a bag lunch on the beach. Here you will find a distinctive community with a rich history and magnificent natural beauty, plus quaint shops, arts, entertainment and plenty more!" (City of Courtenay website, 2019)



Initial Action Plan Document



Title Page of Playbook



Interior Page of Playbook

Downtown Courtenay Playbook

The playbook is a product of the 2015 Downtown Forum and the 2016 Design Charrette. It summarizes the community vision for Downtown Courtenay created through the engagement process and the planning directions and actions for downtown revitalization.

Recognizing there are many actions and partners necessary to enact meaningful and lasting change the Downtown Playbook is a guiding document that outlines the planning vision, goals, principles, strategic tools, policies, and an implementation matrix to revitalize Downtown Courtenay.

The ideas in the Playbook are the result of a strong effort and commitment by those who participated in the community workshops. It is meant to be a reference guide for all partners to identify actions and responsibilities as the community works together to inject new energy Downtown.

Developing a wayfinding strategy is an action identified in the Playbook to fulfill the goal of "make it easier to get to and be in downtown".

Existing Downtown Signage / Elements

Identification

Courtenay features a number of uncoordinated signage initiatives that have been developed and installed throughout the years, both in the downtown and around the City.

Although the BIA implemented its new brand on a variety of street furniture there is a lack of consistency promoting effective wayfinding within an overall municipal signage strategy. BIA logos shown below. Uses of the BIA brand on wayfinding assets shown at right.

Existing wayfinding assets are of various materials, dimensions and installation methods. Unifying such efforts into a consistent strategy will reduce administrative efforts of installing and maintaining a diverse wayfinding stock, as well as provide more visual unity in support of consistent branding.



Theme: Street Signs with BIA and Courtenay Crest Signature



Theme: Downtown Garbage Receptical Housing with BIA Signature



Theme: Back of Stop Sign with Courtenay Crest and BIA Signature



Theme: Downtown Promotional Lamp Post Banners



Existing Downtown Signage / Elements

Directional / Mapping



Theme: Directional Node at the Courtenay Museum



Theme: Historic Trail Mapping



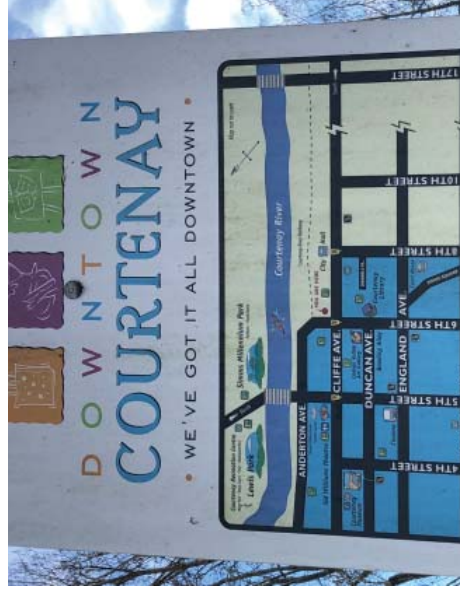
Theme: Directional signage on Cliffe Avenue



Theme: Downtown Courtenay Heritage Mapping



Theme: Downtown Courtenay Mapping at the Sid Williams Theatre



Theme: Downtown Courtenay Mapping at various locations

Existing Signage / Elements

Interpretive

Examples of interpretive signage around Courtenay are shown in order to understand what interpretive format may be suitable for the downtown.



Theme: Environment



Theme: Building History



Theme: Municipal History



Theme: Municipal History



Theme: Environment



Theme: Municipal History



CITY OF
COURTENAY

1.0 INTRODUCTION / BACKGROUND / CONTEXT

Existing Signage / Elements

Interpretive



Theme: Park History



Theme: Environment



Theme: Environment / Initiative



Theme: Environment



Theme: Municipal History



Theme: Environment / Initiative

Existing Signage / Elements

Identification

Examples of identification signage around Courtenay are shown in order to understand what identification format may be suitable for the downtown.



Theme: Park Identification



Theme: Park Identification



Theme: Greenway Identification



Theme: Trail Identification



Theme: Heritage Walk Identification



Theme: Park Identification



Existing Signage / Elements

Information / Regulatory

Examples of regulatory signage around Courtenay are shown in order to understand what regulatory format may be suitable for the downtown.



Theme: Report Information



Theme: Various (Boundary, Regulatory)



Theme: Various (Directional, Regulatory)



Theme: Various Regulatory



Theme: Various Regulatory



Theme: Various (Information, Regulatory)

Existing Signage / Elements

Regulatory



Theme: Regulatory



Theme: Regulatory



Theme: Information & Regulatory



Theme: Regulatory



Theme: Various (Trail Identification, Regulatory)



Theme: Information & Regulatory



Existing Signage / Elements

Commemorative / Specialty

Examples of specialty signage around Courtenay are shown in order to understand what specialty signage formats may be suitable for the downtown.



Theme: Artistic, Environment, downtown



Theme: Commemorative, downtown



Theme: Heritage, downtown



Theme: Commemorative



Theme: Commemorative, downtown



Theme: Wayfinding, East Courtenay greenways



Downtown Courtenay Aerial Photo





Landmarks and Corridors Map

The Downtown Commercial Core is targeted for enhanced wayfinding measures.

Landmarks

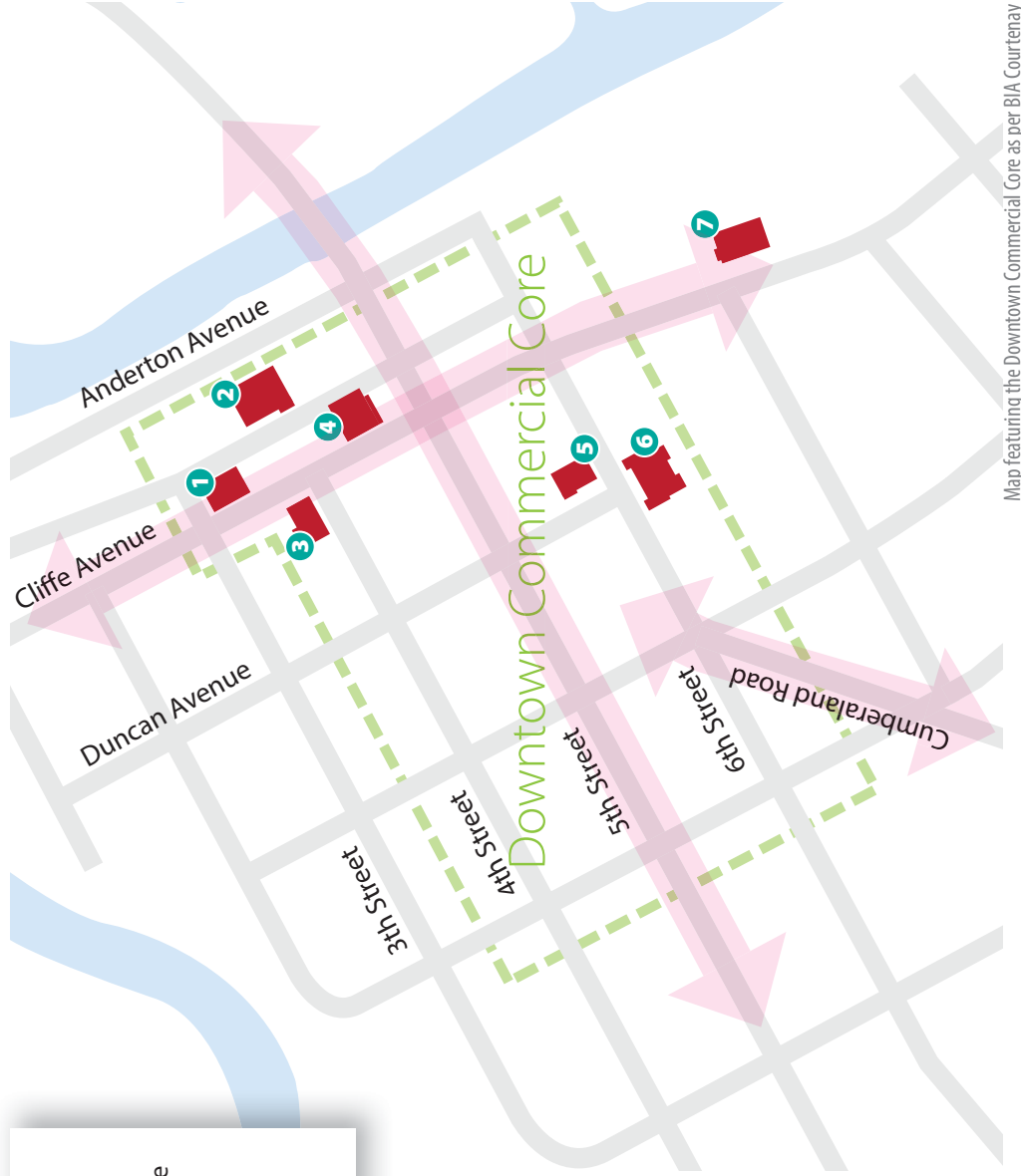
- 1 Native Sons Hall
- 2 Filberg Centre
- 3 Courtenay & District Museum & Paleontology Centre
- 4 Sid Williams Theatre
- 5 Comox Valley Art Gallery
- 6 Vancouver Island Regional Library
- 7 City Hall

Corridors

Key corridors are routes that experience high volumes of traffic and interactivity, thus becoming ideal locations for wayfinding. In the downtown they are:

- Cliffe Avenue parallel to the river
- 5th Street to cross the river
- Cumberland Road to the Comox Valley Parkway and Highway 19 (Inland Island Highway)

The Cliffe Ave / 5th Street Intersection represents the busiest intersection in the downtown area.



Map featuring the Downtown Commercial Core as per BIA Courtenay



2.0 WAYFINDING CONSIDERATIONS



Sign Categories

Sign categories determine the intended purpose of specific assets within a wayfinding hierarchy. The hierarchy moves from basic essential information (identification) through to more detailed, complementary and experiential information (interpretation).

Identification

Sign aims to identify a building, space or environment. It provides a visitor with a name and feature. *For example: Courtenay Greenway*

Information

Sign aims to provide essential information beyond identification about a building, space or environment. Such information could include the main features, recreational opportunities, hours, etiquette, etc. *For example: Hours of Operation*

Direction

Sign aims to provide navigational information using maps or directional elements. Duration of transition to a destination is an added feature that increases user-friendliness. *For example: From the current position to downtown it takes 15 minutes to walk.*

Regulation

Sign aims to indicate safety considerations and boundaries for a given activity. Regulatory signs are often based on municipal bylaws. *For example: This park is open from sunrise to sunset. No fires allowed.*

Interpretation

Sign aims to tell a story about a given building, space or environment. Interpretive information is provided to increase knowledge, awareness and appreciation. Several interpretive principles can be used to effectively engage the viewer. This includes interactivity, metaphor, provocation and invitations to use the senses. *For example: Like a green ribbon, the slough connects natural and the urban landscapes. Close your eyes and listen. What do you hear?*

Note:

In some instances several categories, such as information and direction, can be incorporated into one sign.

Hierarchy

Category

Identification

Information

Direction

Regulation

Interpretation

What is Interpretation?

Interpretation in wayfinding is a value added element which requires special considerations to help connect an individual to place. More detail is provided here on the role, value and skills required when designing with interpretive goals in mind.

Definition of Interpretation

As defined by Interpretation Canada, an association for heritage interpretation:

"Any communication process designed to reveal meanings and relationships of cultural and natural heritage to the public, through first-hand involvement with an object, artifact, landscape or site."

Origin of Interpretation

Most interpretation in North America is based on, or has its roots in, Freeman Tilden's landmark 1957 book, *Interpreting Our Heritage*. In the book, Tilden defined six principles of interpretation:

- Any interpretation that does not somehow relate what is being displayed or described to something within the personality or experience of the visitor will be sterile.
- Information, as such, is not Interpretation. Interpretation is revelation based on information. But they are entirely different things. However, all interpretation includes information.
- Interpretation is an art, which combines many arts, whether the materials presented are scientific, historical, or architectural. Any art is to some degree teachable.
- The chief aim of Interpretation is not instruction, but provocation.
- Interpretation should aim to present a whole rather than a part.
- Interpretation addressed to children (say, up to the age of 12) should not be a dilution of the presentation to adults, but should follow a fundamentally different approach. To be at its best it will require a separate program.

Types of Interpretation

- Personal: public programming, school programming. *For example, a guided walk is a form of personal interpretation.*
- Non-personal: exhibits, brochures, websites. *For example, signs for a self guided trail are a form of non-personal communication.*



Step to Content Development

Interpretive Planning

When planning non-personal interpretation, the three components of content, design and interpretation inform each other in a constant feedback loop.

Interpretive planning has been defined as:

"A communication process that forges intellectual and emotional connections between the interests of the visitor and the meanings inherent in the resource" (The National Association for Interpretation).

Interpretive planning includes these 5Ms:

- **Management:** An understanding of management requirements, needs and capabilities
- **Markets:** An understanding of current and prospective customers and market position, (i.e. your audience)
- **Message:** A strong and appropriate story about the available resources
- **Mechanics:** An understanding of the physical opportunities and constraints of the location
- **Media:** An appropriate mix of methodologies to deliver the message(s) to the market(s) within the constraints of management (From *Interpretive Planning* by Lisa Brochu)

Out of interpretive planning, theme statements, themes, messages and objectives are defined specific to each site.

Interpretive Writing

Here are some guidelines for interpretive writing from *Interpretive Writing* by Alan Leftridge.

Effective interpretive writing:

- is relevant to the reader/visitor
- makes emotional connection with the reader/visitor
- identifies tangibles (those things the reader/visitor can see, hear, touch)
- makes intellectual connections with the reader/visitor
- provokes reader to think, feel or do something new
- connects universal concepts to the tangibles
- encourages reader/visitor to care about the object, place or person being interpreted
- connects reader's interests and subject's meaning
- addresses a complete storyline (as identified in the Interpretive Plan).

Content Development

A series of interpretive signs requires an overarching main theme that is then divided into subthemes for the individual signs.

This can include, but is not limited to, photographs, illustrations, maps, newspaper articles, media clips, documents, architectural drawings and sketches.

The range of information researched and collected is narrowed down to fit the chosen theme. Text and images are selected based on accuracy and appropriateness, space available on the sign, and quality of visuals. Photo copyrights must be indicated.

Copy is written to describe, summarize and interpret the chosen theme. Before a sign theme goes into the design phase, final copy and a close-to-final selection of visuals needs to be in place.



3.0 DOWNTOWN WAYFINDING ELEMENTS & HIERARCHY

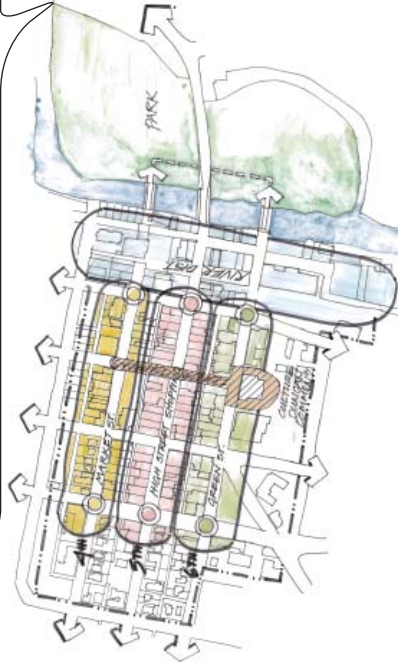


A New Strategy for Wayfinding

Defining a Downtown Wayfinding Brand
In consultation with the Downtown Courtenay Business Improvement Association, a wayfinding brand was developed that provided inspiration for and informed the overall strategy, elements and hierarchy. The wayfinding brand builds on the existing City of Courtenay and Downtown Courtenay BIA brands.

The wayfinding brand centres on the numerical grid of the downtown's core streets - 6th, 5th and 4th Streets, as identified in the **Downtown Courtenay Playbook** as being the core historical commercial street grid (image below).

Colourful The three core colours are selected from the City of Courtenay and Downtown Courtenay BIA branding colour templates and are described in more detail on page 36.



Simplicity The use of three simple numbers is memorable while also being educative about the streets orientation in relation to each other. This simplicity allows for incorporation into further branding materials and easy iconic promotion online. Recognizing other streets as well, one of the Core Street Identifiers educates on the alphabetical order of the cross streets as shown on page 31.

Timeless Although these downtown core streets were not always called 6th, 5th and 4th Streets, the numbers suggest a sense of timelessness, endurance and provide for an opportunity for education and interpretation on the original street names.



Catchy The order of the 6-5-4 is selected rather than 4-5-6 in order to intentionally stand out to the reader, encouraging intrigue, as well as to avoid sounding like a nursery-rhyme.

Yet, Contemporary While suggesting timelessness, the numerical branding also has a playful quality that can be accented with colour and sign templates as shown on pages 32 and 33.

The Downtown Wayfinding Family

A number of different signs are proposed to create a distinctive and reinforcing downtown branding and wayfinding message. Below is the suite shown together, with more description of each on following pages. Not all signs are shown to scale.

Downtown Entrance Markers

Located at key gateways along high traffic corridors to signal to visitors when entering and leaving the downtown. These large signs contain the proposed municipal facilities and parks branding, while including reference to Downtown Courtenay's unique wayfinding brand.



Street Pylons

Colour coded, including directional and interpretive information for each core street. These slim pylons form the traditional roles of orienting and engaging within the downtown and are the backbone to the overall downtown wayfinding strategy.



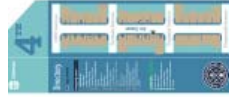
Street Identity Elements

Simple stencils allow for the 6th-5th-4th branding to be easily replicated in multiple locations at minimal cost.



Core Street Identifiers

These life sized signs act as both wayfinding and public art, allowing for memorable branding and physical engagement.



Downtown Directories

Should the BIA decide to create physical directories, templates have been provided.



Downtown Entrance Markers

Entering the Downtown Core and Welcoming Visitors

The Downtown Core Identification signs are relevant to both the Business Improvement Association and the municipality.

The pylons are placed at strategic locations to announce the access to the core downtown area.



Downtown Street Pylons

Multiple Purpose Signs

Each 3-sided pylon is positioned in a key location multiple times on each 6th, 5th and 4th Streets. The pylon fulfills:

- a wayfinding purpose (mapping of key destinations)
- a directional purpose (pointing to key destinations)
- an interpretive purpose (to evoke, confront and interpret the historic significance of the area)

The pylons have been designed to be larger than an average sized adult, creating an impressive visual identity on the landscape. Their slim profile allows for them to be installed in a variety of locations while still allowing pedestrian passage.

Front and back information alternates based on the positioning of the pylon. Three pylons for each street have been designed in detail as shown in Section 4.0 - Pylon Catalogue.

The 6th Street colour scheme has been selected green to correspond with the Downtown Courtenay Playbook 'Green Street' designation recommended for this corridor to the Courtenay River.





CITY OF
COURTENAY

3.0 DOWNTOWN WAYFINDING ELEMENTS & HIERARCHY

Front - Wayfinding

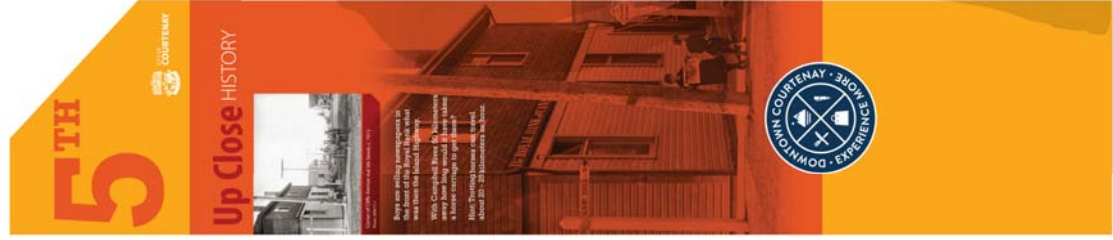
Side - Directional

Back - Interpretive

Front - Wayfinding

Side - Directional

Back - Interpretive



Core Street Identifiers



The 5th Street installation uses texture to reinforce the elements of the BIA brand.



Core Street Identifiers

Core Orientation Device and Photo Op

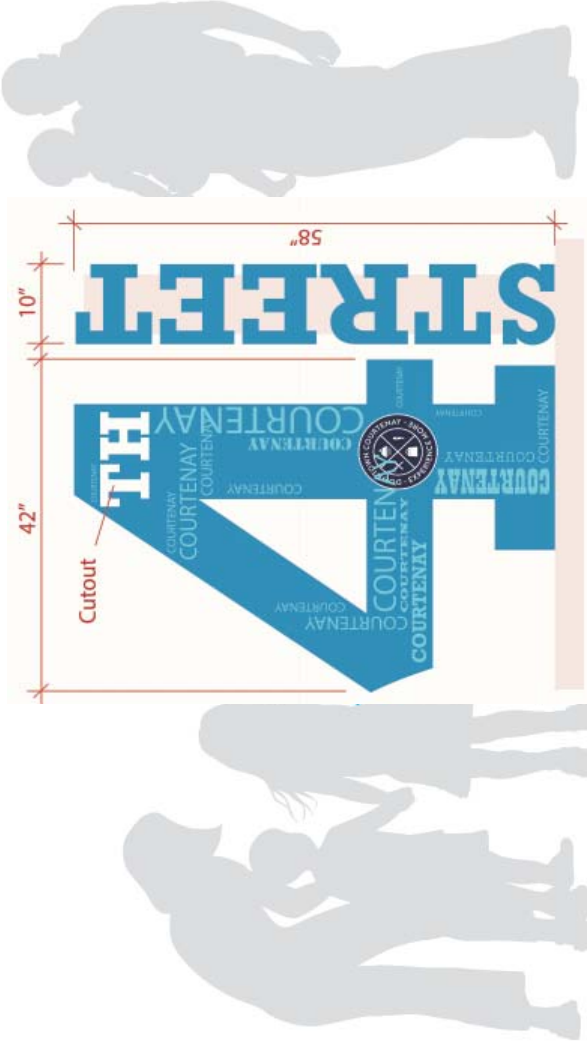
Core Street Identifiers are 2-sided 3-dimensional art pieces. Translating the essential elements of the downtown wayfinding strategy in 3D objects creates landmarks that strengthen the visibility of the strategy.

The pieces become cornerstone installations in each location that may create photo ops and natural gathering points. They are designed to be whimsical and child-friendly and could be used in photo ops to mark the age of young children. Becoming more child friendly is a goal of the **Downtown Courtenay Playbook**.

Positioned in proximity of the library entrance on 6th Street this 3D feature offers a orientation map and a playful, yet instructive, reminder of the alphabetical naming convention of the streets connecting the 4th, 5th and 6th Streets.



DOWNTOWN COURTENAY WAYFINDING MANUAL



The 4th Street installation's typographic play on "Courtenay" is reminiscent of the various historic store and building signage.

The cutout allows light to pass through, creating further wayfinding branding through light and shadow effects. The cutouts are also included on the pylons.

6th / 5th / 4th Street Identity Elements

Developing Street Icons

These street identity elements are like signatures to the downtown wayfinding identity. The icons can be applied as stand alone signs affixed to a structure or used as stencils for painting.

They can easily and even temporarily be applied to pedestrian walks or walls (subject to building owner consent), and can also be integrated into other downtown signage to reassure visitors that they are on a specific street in the downtown area.

As these identity elements appear and repeat in certain areas they become icons for a specific street. Recommended usage to be strategic in order that they enhance the brand.

Each Street Identity Element is 24" X 24".



Pedestrian walk with a spray-on street identity icon.





3.0 DOWNTOWN WAYFINDING ELEMENTS & HIERARCHY

4th / 5th / 6th Street Identity Elements



Concept: Archival image wall mural with street identifier acting as signature. The mural could be a billboard style wrapper to allow for mural changes over time.



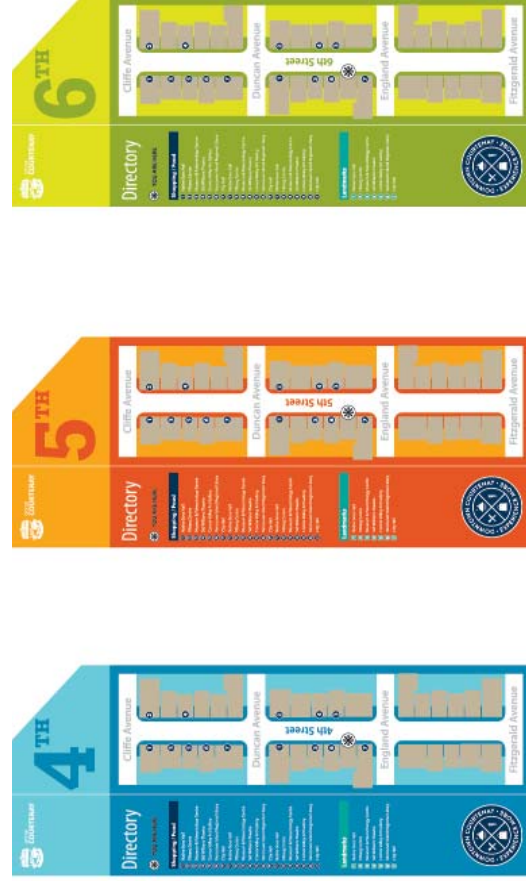
Downtown Directories

Street Directories

Street directories help users find specific businesses and attractions on a given street.

The BIA has indicated that store directories will remain online to capitalize on the use of handheld mobile devices, and to avoid having to replace them as businesses turn over. However, should the BIA decide to install such directories, these examples have been provided.

Business directory signage will not be municipally funded.









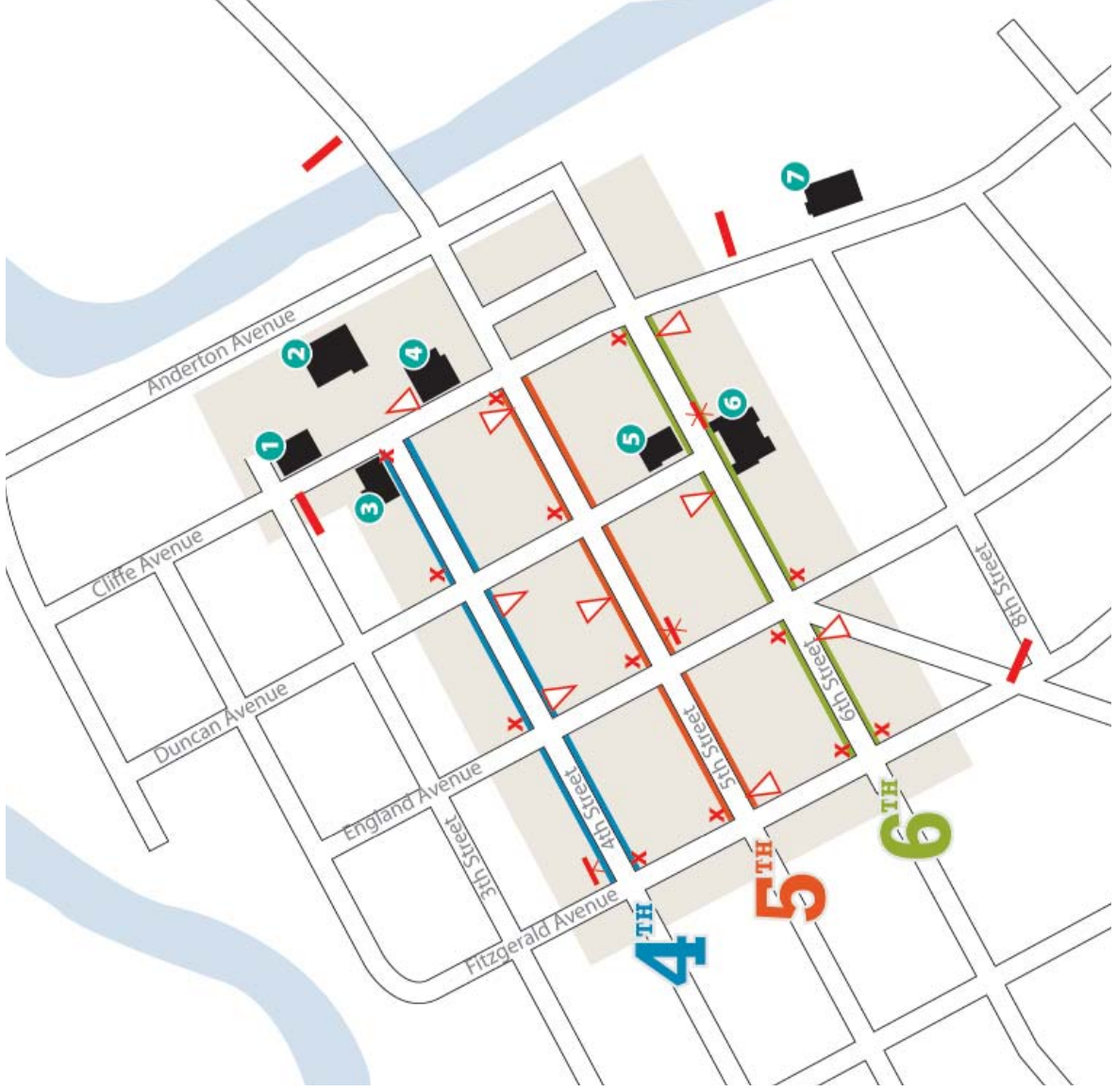
Placement Matrix

Strategic Placement

Each downtown sign category will be placed at a strategic location that ensures maximum visibility, linkages to other visual identity elements, accessibility and functionality.

The placement matrix indicated here has been initially vetted by the BIA and City staff. Installation will require additional placement refinement.

-  Street Pylon
-  Core Street identifier art pieces
-  Stenciled street identity element
-  Downtown entrance marker



Coexisting Municipal and BIA Brands

Navigating Municipal and BIA Branding

Two identities exist to promote the City on a municipal administrative and commercial level. The recommended wayfinding and signage strategy incorporates both identities with shifting importance based on placement and purpose.



CITY OF
COURTENAY



CITY OF
COURTENAY



Pantone
CMYK
RGB
Hex#

3165C
C100 / M0 / Y28 / K65
R0 / G83 / B94
00535e



Pantone
CMYK
RGB
Hex#

180C
C0 / M79 / Y100 / K11
R217 / G83 / B30
D9531E



Pantone
CMYK
RGB
Hex#

80% BLACK
C0 / M0 / Y0 / K80
R88 / G89 / B91
58595B



Pantone
CMYK
RGB
Hex#

376C
C50 / M0 / Y100 / K0
R141 / G198 / B63
8DC63F

The City of Courtenay brand crest and house colours.



CITY OF
COURTENAY



**DOWNTOWN
COURTENAY**



COLOUR PALETTE



PANTONE
7693C
CMYK:
100/75/31/41
HEX: #004876



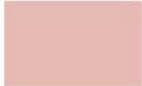
PANTONE
3105C
CMYK:
54/0/14/0
HEX: #63D0DF



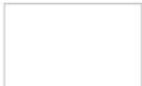
PANTONE
396C
CMYK:
16/31/100/0
HEX: #E2E000



PANTONE
166C
CMYK:
4/82/100/0
HEX: #E75300



PANTONE
7605C
CMYK:
8/29/23/0
HEX: #E5BAB3



PANTONE
WHITE C
CMYK:
0/0/0/0
HEX: #FFFFFF

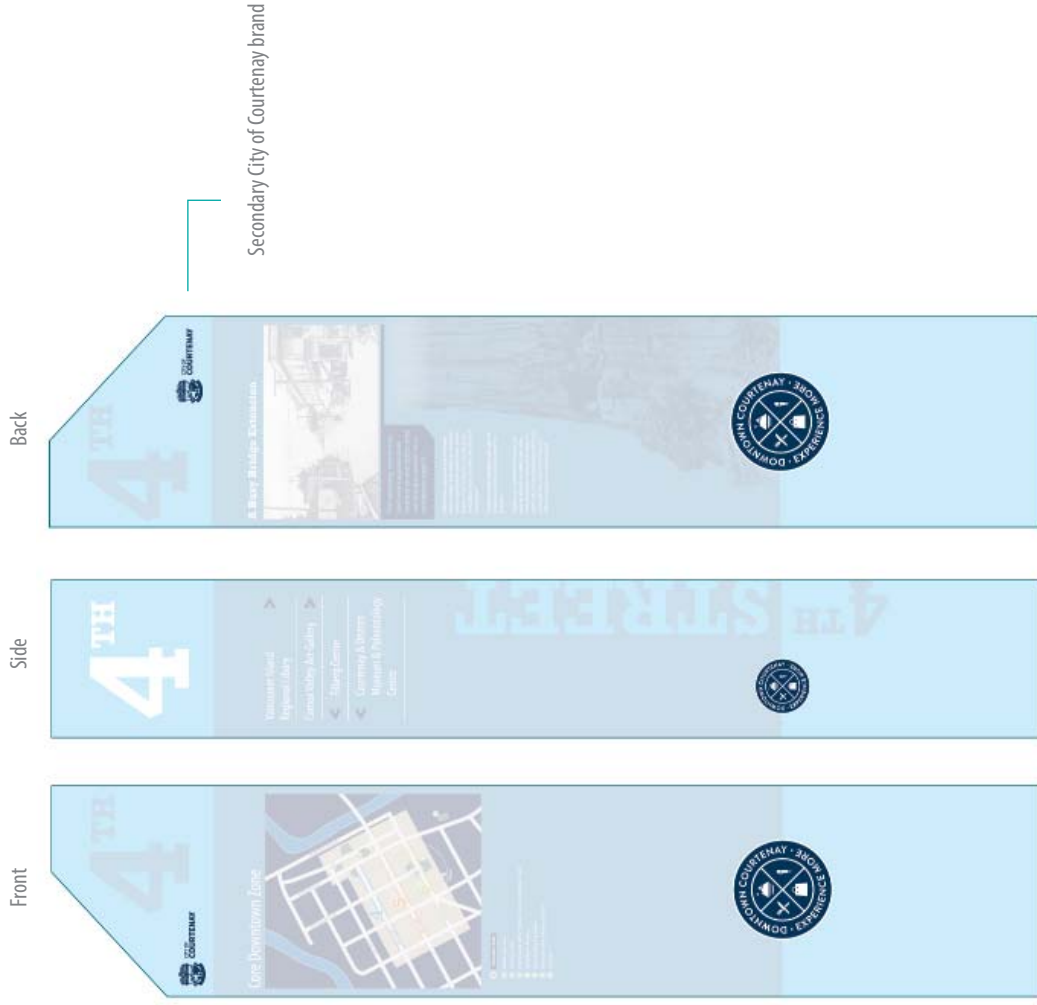
The Business Improvement Association brand logo and primary colour palette.



The Elements

Branding Usage (City / BIA)

Two significant brands coexist in the downtown signage initiative. The City of Courtenay brand is secondary to the primary Business Improvement Association brand within the downtown.





The Elements

Brand Colours

Three main colours are used as primary colours, shown in the first row.

Secondary colours are set in darker shades, as shown in the bottom row.

Primary / Secondary Colours

4th Street - Light Sky

4 TH	Cyan 54
	Magenta 0
	Yellow 14
	Black 0
	R 104
	G 203
	B 218

5th Street - Light Sun

5 TH	Cyan 0
	Magenta 40
	Yellow 100
	Black 0
	R 250
	G 166
	B 26

6th Street - Light Meadow

6 TH	Cyan 16
	Magenta 1
	Yellow 100
	Black 0
	R 224
	G 224
	B 29

4th Street - Dark Sky

4 TH	Cyan 74
	Magenta 12
	Yellow 0
	Black 25
	R 0
	G 137
	B 182

5th Street - Dark Sun

5 TH	Cyan 4
	Magenta 82
	Yellow 100
	Black 0
	R 231
	G 85
	B 37

6th Street - Forest

6 TH	Cyan 38
	Magenta 4
	Yellow 100
	Black 17
	R 145
	G 171
	B 46

The Elements

Directional Elements



Directional arrows and
You Are Here marker.

<p>Vancouver Island Regional Library</p> <p>Comox Valley Art Gallery</p> <p>Filberg Centre</p> <p>Courtenay & District Museum & Paleontology Centre</p>	<p>Vancouver Island Regional Library</p> <p>Comox Valley Art Gallery</p> <p>Filberg Centre</p> <p>Courtenay & District Museum & Paleontology Centre</p>	<p>Vancouver Island Regional Library</p> <p>Comox Valley Art Gallery</p> <p>Filberg Centre</p> <p>Courtenay & District Museum & Paleontology Centre</p>
---	---	---



The Elements

Typography

Rockwell Bold

Recommended use: headings, large type

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz 1234567890

Myriad Pro Roman

Recommended use: body copy

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz 1234567890

Myriad Pro Bold

Recommended use: subheadings

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz 1234567890

Myriad Pro Condensed

Recommended use: captions, credits, small type

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz 1234567890

Myriad Pro Bold Condensed

Recommended use: subheadings, caption headers

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz 1234567890

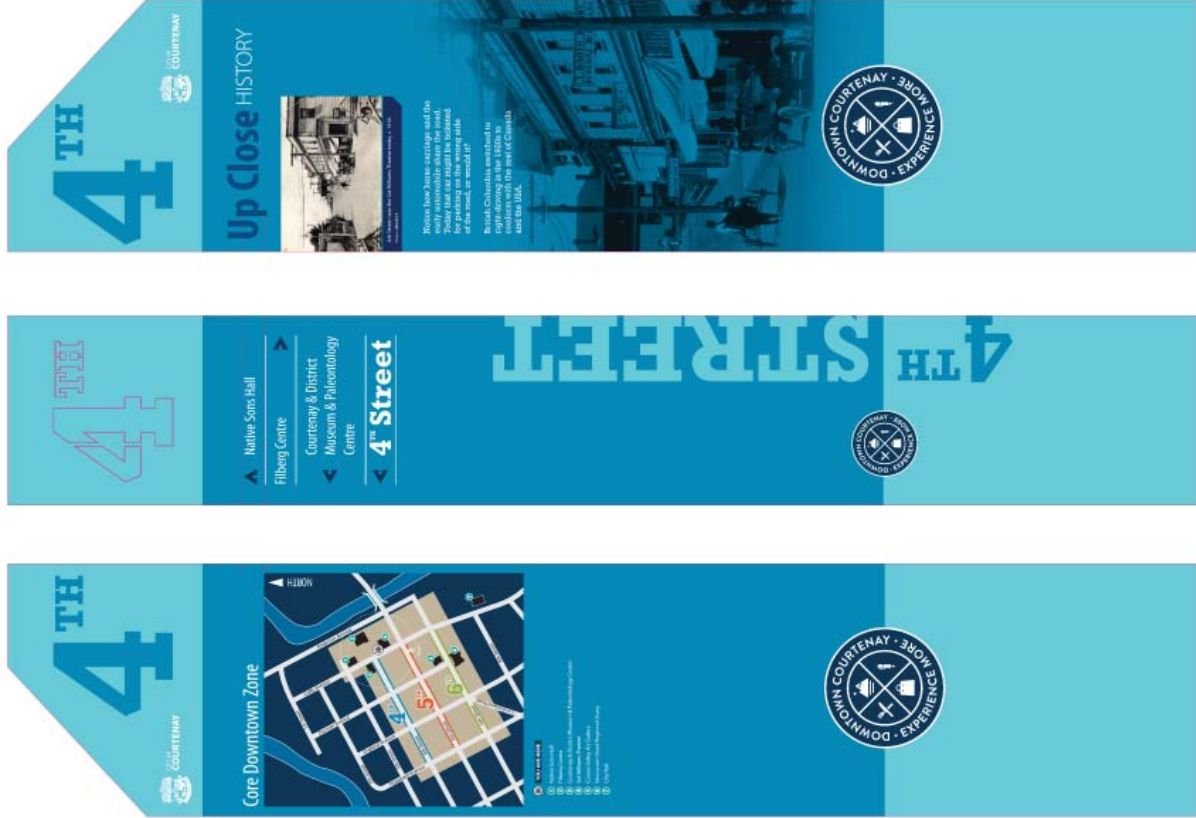
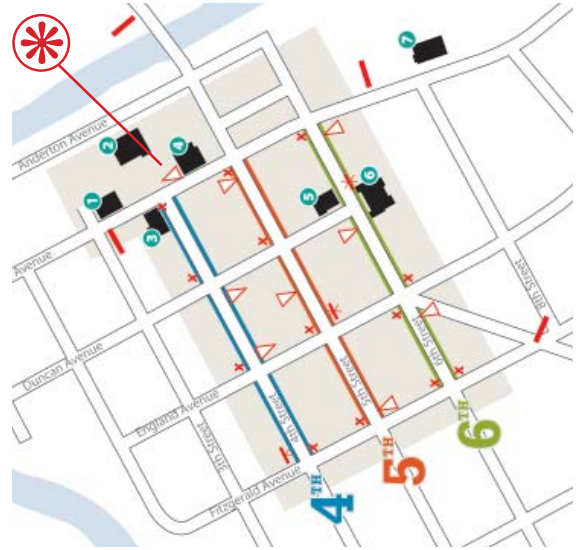


4.0 DETAILED STREET PYLON CATALOGUE

4.0 SIGN CATALOGUE

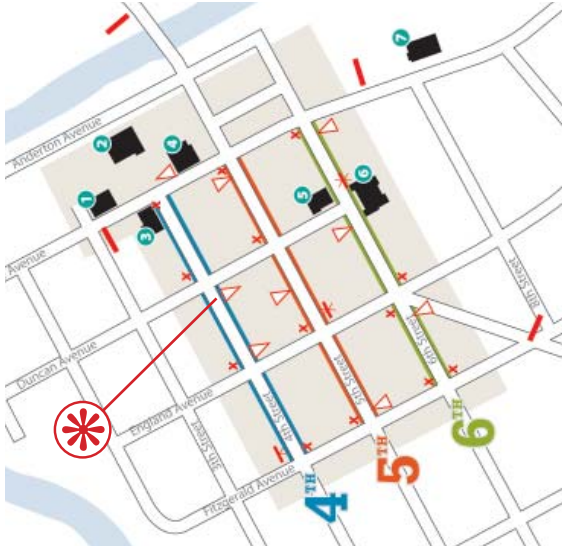
The pylons in this section provide more detail to the 9 pylons proposed. Content and images are subject to refinement.

Street Pylon 4.1

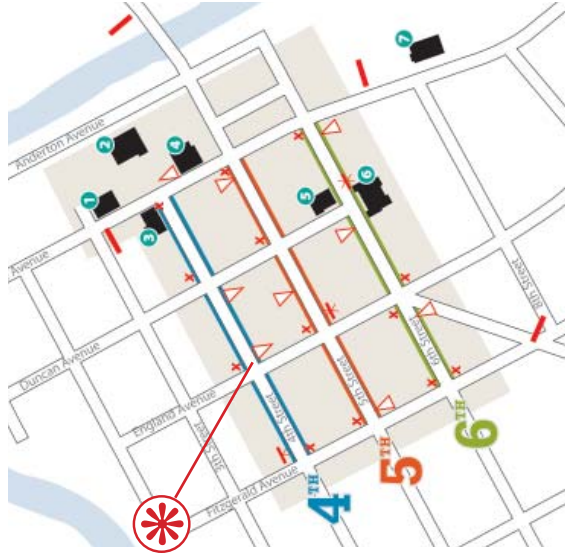




Street Pylon 4.2

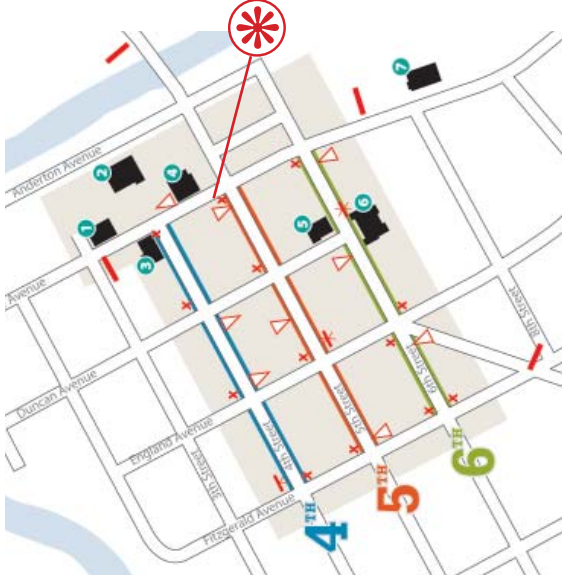


Street Pylon 4.3

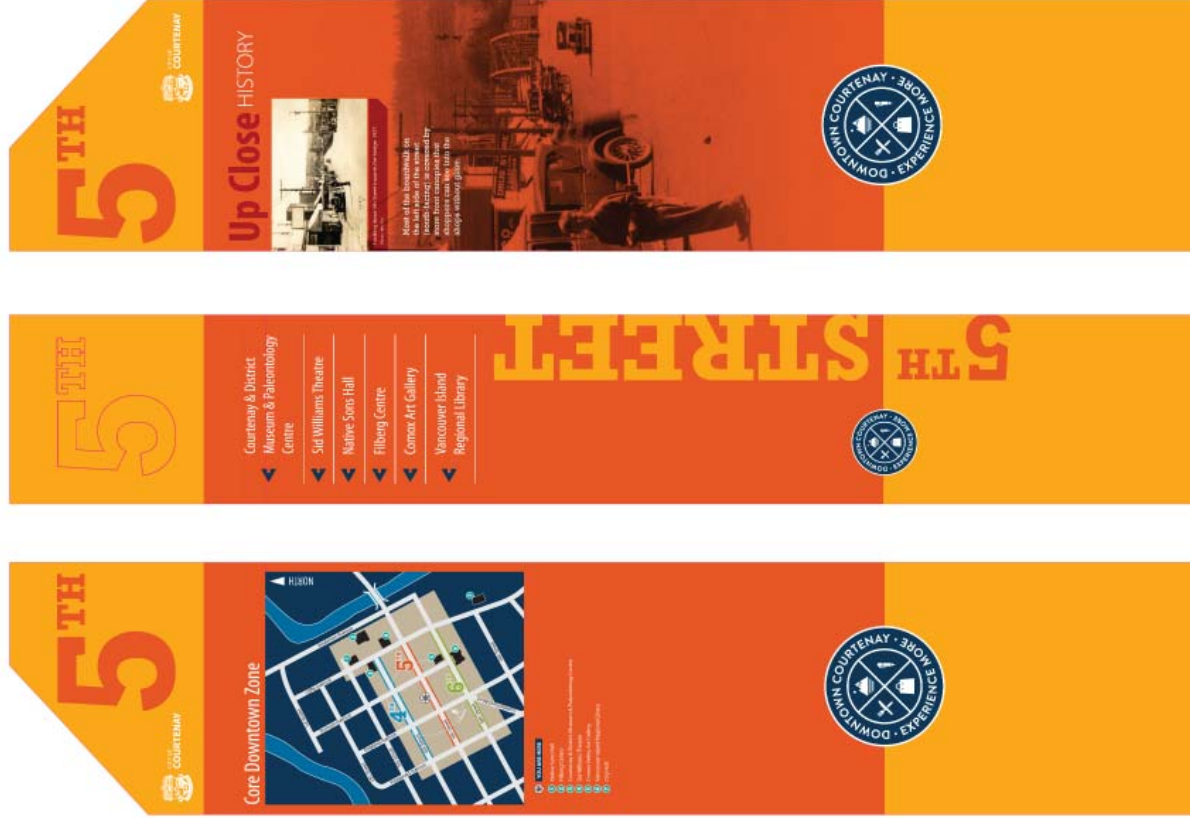
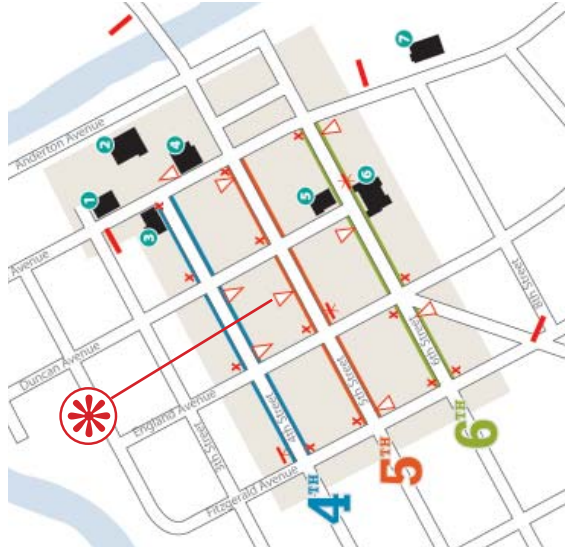




Street Pylon 5.1



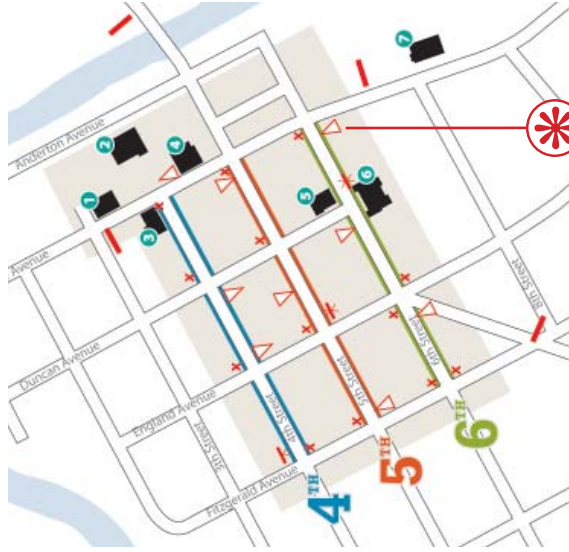
Street Pylon 5.2



Street Pylon 5.3

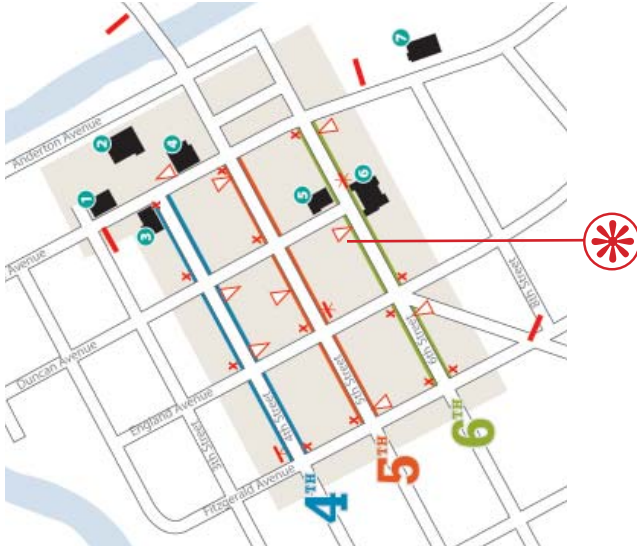


Street Pylon 6.1

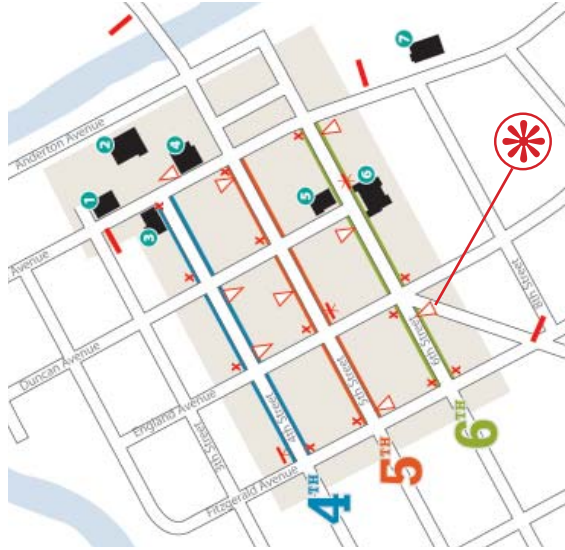




Street Pylon 6.2



Street Pylon 6.3



PARKS AND MUNICIPAL FACILITIES WAYFINDING MANUAL

NOVEMBER 2019 FINAL DRAFT



CITY OF
COURTENAY

TABLE OF CONTENTS



1.0 INTRODUCTION / BACKGROUND / CONTEXT

2.0 WAYFINDING CONSIDERATIONS

3.0 WAYFINDING ELEMENTS & HIERARCHY

4.0 APPLICATIONS

Why Wayfinding	4	Signage Categories	16	Courtenay Parks / Trails –		Sample Methodology for a	
About the Location	6	What is Interpretation?	17	West of the River	20	Complex Sign Project	42
Objectives / Goals	5	Steps to Content Development	18	East of the River	21	Practical Example: Bill Moore /	
Existing Signage / Elements	7			Parks & Facilities Wayfinding Family	22	Dogwood Park Signage	43
				Sign Placement Matrix	24	Placement Matrix	43
				Parks / Trails Identification	26	Signage Listing	44
				Major Trailheads	27	Inspection and	
				Minor Trailheads	28	Maintenance Form	50
				Parks / Trails / Urban Direction	29		
				Parks / Trails Information	30		
				Parks / Trails Regulation	32		
				Interpretation (large)	33		
				Interpretation (medium)	34		
				Interpretation (small)	35		
				Downtown Identification	36		
				Facility / Landmark ID	37		
				The Elements	38		
				Primary Colours	38		
				Typography	39		
				Directional & Pictograms	40		



1.0 INTRODUCTION BACKGROUND CONTEXT

Why Wayfinding?

Why develop a wayfinding strategy for parks and municipal facilities?

There are numerous advantages to utilizing a strategy for wayfinding. Here are the most important benefits which apply to numerous contexts.

Consistency & Safety

Consistent signage is predictable and intuitive. It carries important safety messages that are crucial for all visitors. Consistency and clarity reduces the time it takes to learn the system.

Putting Tax Dollars to Work

Residents would like to know how their tax dollars are applied. Effective wayfinding is a tangible asset that identifies other community assets that may not be obvious. For example, parks and facilities that do not have distinctive or extensive frontages.

Increasing Resident Awareness

Wayfinding can increase residents' awareness of their community resulting in well-used parks and increased usage of traffic corridors such as trails and greenways.

Putting the Municipality on the Map

A clear identity and attractive wayfinding elements are often key indicators of a community's pride and confidence. The feedback in other communities with wayfinding strategies is often a noticeable increase in visitation and revenue (e.g. in the Downtown).

Helping Tourists to Navigate

A cohesive signage system enables visitors to navigate important community destinations, commercial areas, public spaces, parks and trails with ease and greater enjoyment. This experience increases visitor satisfaction and may lead to repeat visitation. Often it has a promotional effect as well. Visitors recommend destinations because they enjoyed the experience and would like to share it.



Project Objectives / Goals

Objectives

This Parks and Municipal Facilities Wayfinding Manual is was developed in coordination with the **Downtown Courtenay Wayfinding Manual** (presented separately). A Downtown Wayfinding strategy was initiated to fulfill goals of the

Downtown Courtenay Playbook: A Partnership Action Plan (2016), and in support of Downtown Courtenay Business Improvement Association (BIA) current priorities. Upon exploring wayfinding goals for the downtown, it was discovered that coordination with wider municipal wayfinding would be critical to its success. The project for the downtown wayfinding was therefore expanded to include a wayfinding strategy for parks and municipal facilities as well.

The scope includes:

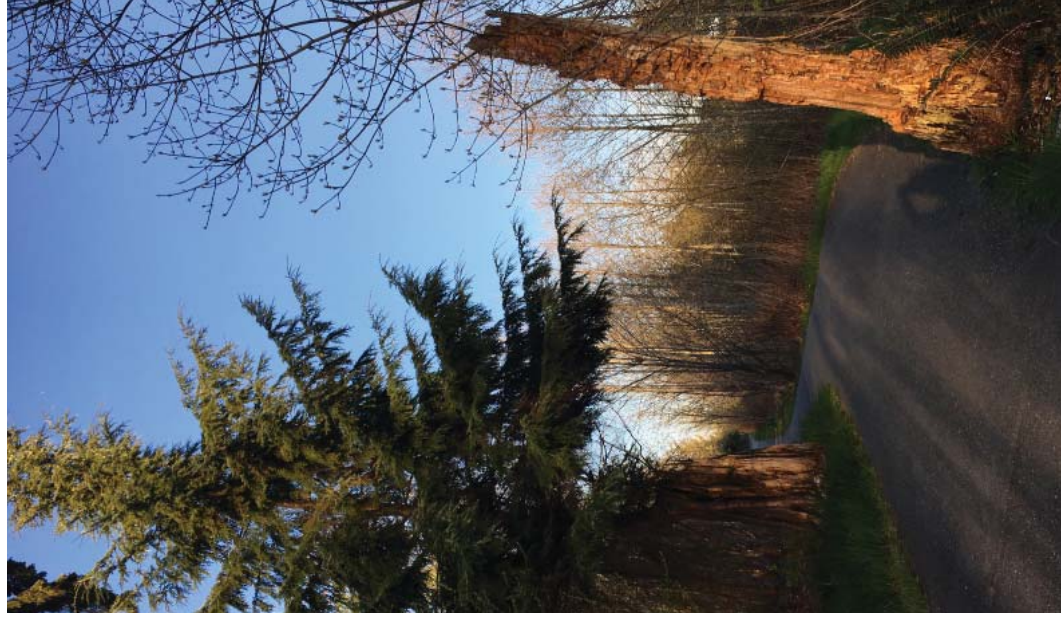
- documentation and evaluation of existing parks and municipal signage
- recommendations for sign categories, theme, character and hierarchies for the overall municipality with a focus on parks, trails and municipal facilities
- coordination of parks and municipal facility signage themes with Downtown Courtenay theme, character and hierarchy
- development of parks signage using a demonstration location to demonstrate functionality and scalability

Goals

The following goals were identified at the initiation of this project:

- increase visitor-friendliness
- improve orientation
- raise awareness and appreciation of municipal features
- increase downtown business revenue through revitalization
- develop a look and feel to market the features of the municipality to the local and regional audience
- make Courtenay a destination

Nature trails are beloved features of the community and could be enhanced with coordinated and strategic wayfinding to improve user experience





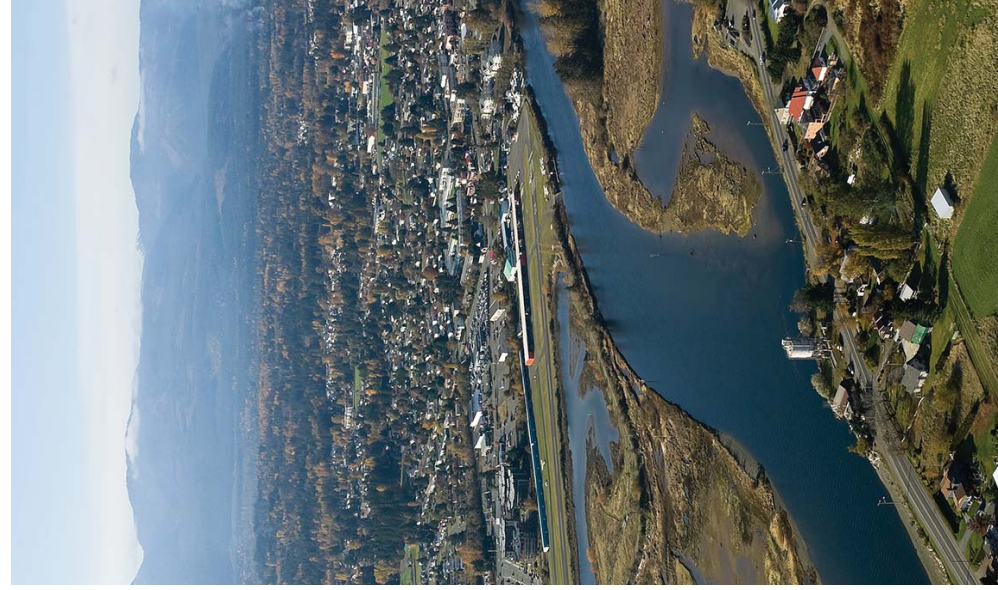
About the Location

Location

Located on the east coast of Vancouver Island in British Columbia, the city of Courtenay is approximately one-hour drive north of Nanaimo. Courtenay is the largest community in the Comox Valley and is part of the Comox Valley Regional District.

Brief History

From archaeological evidence we know that there was an active Coast Salish fishing village close to the Courtenay River estuary about 4,000 years ago. Courtenay was named after the captain of the HMS Constance, which frequented the area. Early settlers arrived in 1862 and started farming on the east side of the river. After the first bridge was built by Joseph McPhee, development on the higher ground of the river's west side began with a sawmill. A coal mine opened up in nearby Union Bay in 1888 by Robert Dunsmuir. This industry brought a large number of new people to the region, including Japanese and Chinese immigrants.



City of Courtenay

"The City of Courtenay is situated on the east coast of central Vancouver Island, within the traditional lands of the Kómoks First Nation. Accessible by land, sea or air, Courtenay is a culturally diverse community that offers supernatural beauty at its doorstep. The City of Courtenay (approximate population 25,000) is the urban and cultural hub of the larger community, the Comox Valley (approximate population 65,000).

Courtenay is an innovative, vibrant and growing city that works together to provide opportunities and excellent services making our community a great place to live, work and do business.

With many beaches, rivers, and lakes; Mt. Washington Ski and Alpine Resort; and world class golfing, the Comox Valley is known for its year-round recreation and sports opportunities. This is one of few places in the world where you may go ocean kayaking in the morning, cycle at lunch, downhill ski in the afternoon ... and then end your day dining at a five-star restaurant or simply enjoying a bag lunch on the beach. Here you will find a distinctive community with a rich history and magnificent natural beauty, plus quaint shops, arts, entertainment and plenty more!" (City of Courtenay website, 2019)



Existing Signage / Elements

Interpretive

Examples of interpretive signage around Courtenay are shown in order to understand what interpretive format may be suitable for parks and municipal facilities.



Theme: Environment



Theme: Building History



Theme: Municipal History



Theme: Municipal History



Theme: Environment



Theme: Municipal History

Existing Signage / Elements

Interpretive



Theme: Park History



Theme: Environment



Theme: Environment / Initiative



Theme: Environment



Theme: Municipal History



Theme: Environment / Initiative

Existing Signage / Elements

Identification

Examples of identification signage around Courtenay are shown in order to understand what identification format may be suitable for parks and municipal facilities.



Theme: Park Identification



Theme: Park Identification



Theme: Greenway Identification



Theme: Trail Identification



Theme: Heritage Walk Identification



Theme: Park Identification

Existing Signage / Elements

Information / Regulatory

Examples of regulatory signage around Courtenay are shown in order to understand what regulatory format may be suitable for parks and municipal facilities.



Theme: Report Information



Theme: Various (Boundary, Regulatory)



Theme: Various (Directional, Regulatory)



Theme: Various Regulatory



Theme: Various Regulatory



Theme: Various (Information, Regulatory)



Existing Signage / Elements

Regulatory



Theme: Regulatory



Theme: Regulatory



Theme: Information & Regulatory



Theme: Regulatory



Theme: Various (Trail Identification, Regulatory)



Theme: Information & Regulatory



Existing Signage / Elements

Commemorative / Specialty

Examples of specialty signage around Courtenay are shown in order to understand what specialty signage formats may be suitable for parks and municipal facilities.



Theme: Artistic, Environment, downtown



Theme: Commemorative, downtown



Theme: Heritage, downtown



Theme: Commemorative



Theme: Commemorative, downtown



Theme: Wayfinding, East Courtenay greenways



Existing Signage / Elements

Downtown Courtenay Business Improvement Association Identification

Downtown branding and signage is shown in order to understand wayfinding compatibility for parks and municipal facilities.



**DOWNTOWN
COURTENAY**

Above: Two variations of Downtown Courtenay BIA branding



Theme: Street Signs with BIA and Courtenay Crest Signature



Theme: Downtown Garbage Receptical Housing with BIA Signature



Theme: Back of Stop Sign with Courtenay Crest and BIA Signature

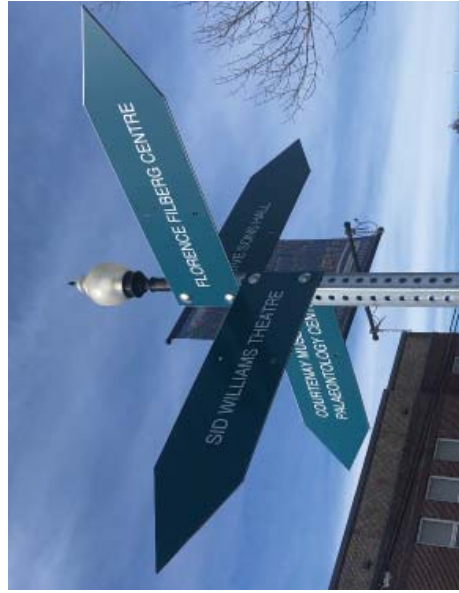


Theme: Downtown Promotional Lamp Post Banners

Existing Downtown Signage / Elements



Directional / Mapping in Downtown Courtenay



Theme: Directional Node at the Courtenay Museum



Theme: Historic Trail Mapping



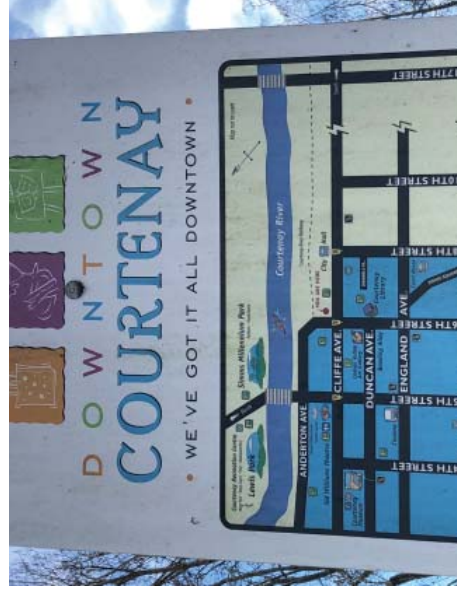
Theme: Directional signage on Cliffe Avenue



Theme: Downtown Courtenay Heritage Mapping



Theme: Downtown Courtenay Mapping at the Sid Williams Theatre



Theme: Downtown Courtenay Mapping at various locations



2.0 WAYFINDING CONSIDERATIONS

Sign Categories

Sign categories determine the intended purpose of specific assets within a wayfinding hierarchy. The hierarchy moves from basic essential information (identity) through to more detailed, complementary and experiential information (interpretation).

Identification

Sign aims to identify a building, space or environment. It provides a visitor with a name and feature. *For example: Courtenay Greenway*

Information

Sign aims to provide essential information beyond identification about a building, space or environment. Such information could include the main features, recreational opportunities, hours, etiquette, etc. *For example: Hours of Operation*

Direction

Sign aims to provide navigational information using maps or directional elements. Duration of transition to a destination is an added feature that increases user-friendliness. *For example: From the current position to downtown it takes 15 minutes to walk.*

Regulation

Sign aims to indicate safety considerations and boundaries for a given activity. Regulatory signs are often based on municipal bylaws. *For example: This park is open from sunrise to sunset. No fires allowed.*

Interpretation

Sign aims to tell a story about a given building, space or environment. Interpretive information is provided to increase knowledge, awareness and appreciation. Several interpretive principles can be used to effectively engage the viewer. This includes interactivity, metaphor, provocation and invitations to use the senses. *For example: Like a green ribbon, the slough connects natural and the urban landscapes. Close your eyes and listen. What do you hear?*

Note:

In some instances several categories, such as information and direction, can be incorporated into one sign.

Hierarchy

Category

Identification

Information

Direction

Regulation

Interpretation



Interpretation in wayfinding is a value added element which requires special considerations to help effectively connect an individual to place. More detail is provided here on the role, value and skills required when designing with interpretive goals in mind.

Definition of Interpretation

As defined by Interpretation Canada, an association for heritage interpretation:

"Any communication process designed to reveal meanings and relationships of cultural and natural heritage to the public, through first-hand involvement with an object, artifact, landscape or site."

Origin of Interpretation

Most interpretation in North America is based on, or has its roots in, Freeman Tilden's landmark 1957 book, *Interpreting Our Heritage*. In the book, Tilden defined six principles of interpretation:

- Any interpretation that does not somehow relate what is being displayed or described to something within the personality or experience of the visitor will be sterile.
- Information, as such, is not Interpretation. Interpretation is revelation based on information. But they are entirely different things. However, all interpretation includes information.
- Interpretation is an art, which combines many arts, whether the materials presented are scientific, historical, or architectural. Any art is to some degree teachable.
- The chief aim of Interpretation is not instruction, but provocation.
- Interpretation should aim to present a whole rather than a part.
- Interpretation addressed to children (say, up to the age of 12) should not be a dilution of the presentation to adults, but should follow a fundamentally different approach. To be at its best it will require a separate program.

Types of Interpretation

- Personal: public programming, school programming. *For example, a guided walk is a form of personal interpretation.*
- Non-personal: exhibits, brochures, websites. *For example, signs for a self guided trail are a form of non-personal communication.*

What is Interpretation?

Step to Content Development

Interpretive Planning

When planning non-personal interpretation, the three components of content, design and interpretation inform each other in a constant feedback loop.

Interpretive planning has been defined as:

"a communication process that forges intellectual and emotional connections between the interests of the visitor and the meanings inherent in the resource"
(The National Association for Interpretation).

Interpretive planning includes these 5Ms:

- **Management:** An understanding of management requirements, needs and capabilities
- **Markets:** An understanding of current and prospective customers and market position, (i.e. your audience)
- **Message:** A strong and appropriate story about the available resources
- **Mechanics:** An understanding of the physical opportunities and constraints of the location
- **Media:** An appropriate mix of methodologies to deliver the message(s) to the market(s) within the constraints of management (From *Interpretive Planning* by Lisa Brochu)

Out of interpretive planning, theme statements, themes, messages and objectives are defined specific to each site.

Interpretive Writing

Here are some guidelines for interpretive writing from *Interpretive Writing* by Alan Leftridge.

Effective interpretive writing:

- is relevant to the reader/visitor
- makes emotional connection with the reader/visitor
- identifies tangibles (those things the reader/visitor can see, hear, touch)
- makes intellectual connections with the reader/visitor
- provokes reader to think, feel or do something new
- connects universal concepts to the tangibles
- encourages reader/visitor to care about the object, place or person being interpreted
- connects reader's interests and subject's meaning
- addresses a complete storyline (as identified in the Interpretive Plan)

Content Development

A series of interpretive signs requires an overarching main theme that is then divided into subthemes for the individual signs.

This can include, but is not limited to, photographs, illustrations, maps, newspaper articles, media clips, documents, architectural drawings and sketches.

The range of information researched and collected is narrowed down to fit the chosen theme. Text and images are selected based on accuracy and appropriateness, space available on the sign, and quality of visuals. Photo copyrights must be indicated.

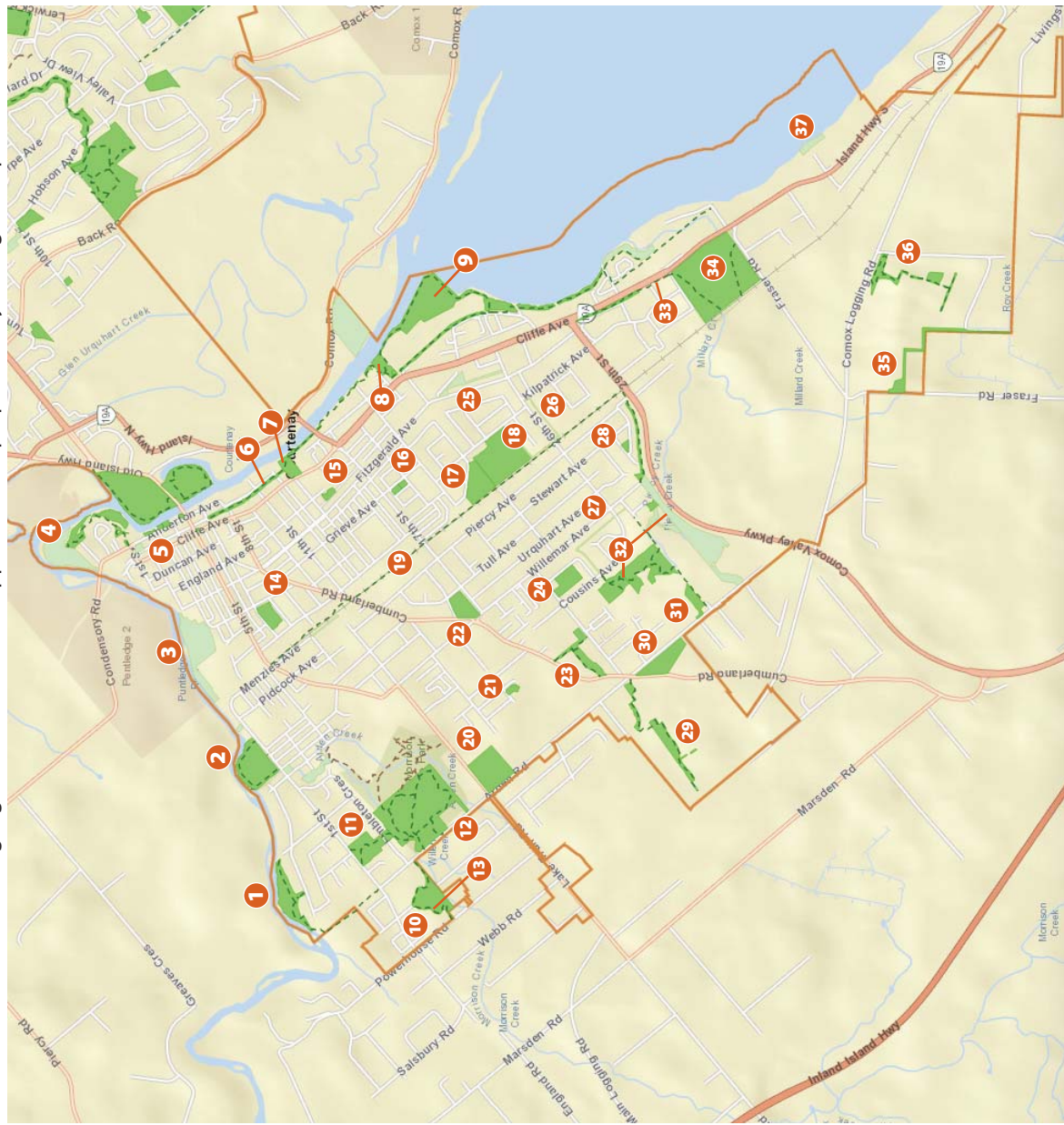
Copy is written to describe, summarize and interpret the chosen theme. Before a sign theme goes into the design phase, final copy and a close-to-final selection of visuals needs to be in place.



3.0 WAYFINDING ELEMENTS & HIERARCHY

Courtenay Parks / Trails – West of the River

Parks and Trails shown to highlight the extent of the application for proposed wayfinding concepts.

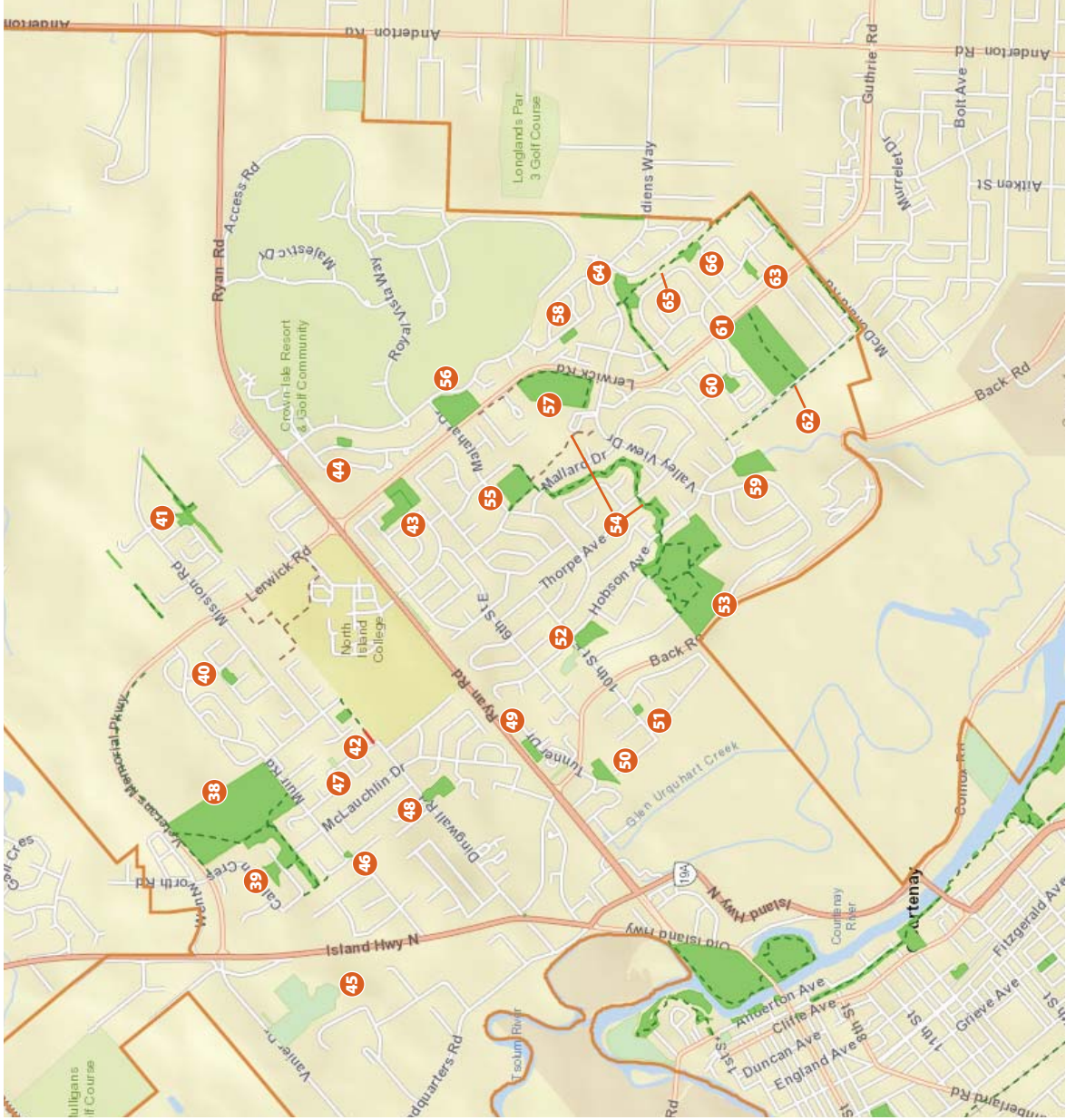


West of the River – Parks and Trails Listing

- 1 Bear James Park with Rotary Riverside Trail
- 2 Puntledge Park
- 3 Puntledge Meadows
- 4 Condensory Park with 1st Street Trail
- 5 Riverside Park
- 6 Courtenay Riverway
- 7 Standard Park
- 8 Courtenay Marina Park
- 9 Air Park with Rotary Skypark
- 10 Morrison Creek Park
- 11 Malcom-Morrison Sr. Park
- 12 Roy Morrison Park
- 13 Morrison Creek Greenway
- 14 Hamston Park
- 15 Cooper Park
- 16 Maple Park
- 17 Dogwood Park
- 18 Bill Moore Park
- 19 Rotary Trail
- 20 Tarling Park
- 21 Krebs/Larsen Park
- 22 Woodcote Park
- 23 Cumberland & 20th with Cumberland & 20th Trail
- 24 Martin Park
- 25 Fitzgerald Park
- 26 26th Buffer Park
- 27 Rosewall Buffer Park
- 28 Galloway Park
- 29 Arden Road Park with Copperfield Trail
- 30 Capes Park
- 31 Cousins Park
- 32 Piercy Creek Greenway
- 33 Millard Creek Greenway
- 34 Millard Creek Park
- 35 Millard Creek Greenway
- 36 The Ridge Park with Buckstone Trail
- 37 South of City Park



Courtenay Parks / Trails – East of the River



East of the River – Parks and Trails Listing

- 38 Sandwick Park
- 39 Muir/McClaudlin Park with Muir/McClaudlin Park Trail
- 40 Walbran Park
- 41 Elderberry Park
- 42 North Island College Greenway
- 43 Pinegrove Park
- 44 Monarch Park
- 45 Vanier Nature Park
- 46 Ashwood Park
- 47 Cruikshank Park
- 48 Sunrise Park
- 49 Knights of Columbus Park
- 50 Lawrence Burns Park
- 51 Trumpeter Glen Park
- 52 Hobson Park
- 53 Hurford Hill Nature Park
- 54 Valley View Greenway
- 55 Malahat Storm Park
- 56 Crown Isle Park 150 Year Grove
- 57 Valley View Park
- 58 Sussex Park
- 59 Hawk Glen Park
- 60 Blue Jay Park
- 61 Lerwick Nature Park
- 62 Hawk Greenway
- 63 Inverclyde Park
- 64 Idlens Park
- 65 Idlens Greenway
- 66 Hebrides Park

3.0 WAYFINDING ELEMENTS & HIERARCHY



The Parks & Municipal Facilities Wayfinding Family

Examples of the sign categories are shown below. There are many purposes for signage within a parks and municipal facilities context. Common materials, shapes, mounting options, colours and combinations of sign elements are used in a variety of contexts to create familiarity and legibility across the City's public landscape. Images are not all to scale.



Park Identification (Left)
Welcoming visitors to parks and trails.



Major Trailhead (Left)
Orienting in high traffic locations.



Minor Trailhead (Left)
Orienting in lower traffic locations.

Regulatory (Below)



Two examples of **Park & Trail Information** signs for different contexts
(Left - trail markers;
Right - etiquette)



Directional options (Right)





The Parks & Municipal Facilities Wayfinding Family



Three options (above) for **Interpretive Signage** depending on the context. At left, the large pylon is the same shape and style as the Downtown Courtenay wayfinding pylons described in the **Downtown Courtenay Wayfinding Manual**. In the middle, a traditional style wayfinding mount. At right, a small educational sign.

Bottom left, a **Facility Sign**.
Bottom right, the **Downtown Courtenay Entrance Marker** (as described further in the **Downtown Courtenay Wayfinding Manual**).



Sign Placement Matrix

The map at right shows a hypothetical park with multiple sign categories applied. Individual signs are described in more detail on the following pages.

Signage Category / Placement

- 1** Park Identification
 - A** Park Identification (Major)
 - B** Park / Trail Identification (Minor)
- 2** Trailhead (Major)
- 3** Trailhead (Minor)
- 4** Parks / Trail / Urban Direction
 - A** Direction Mid-trail Placement
 - B** Direction Trailhead Placement
 - C** Direction Street Sidewalk Placement
 - D** Direction Downtown Plaza / Key Decision Point Placement
- 5** Parks / Trails Information
 - A** Dispenser
 - B** Distance Marker + Information / Regulation
 - C** Boundary Marker / Mid-trail Identifier
- 6** Parks / Trails Information
 - A** Parks
 - B** Facilities
 - C** Playgrounds
- 7** Parks / Trails Regulation
- 8** Interpretation
 - A** Interpretation (large – pylon)
 - B** Interpretation (medium –wayside panel)
 - C** Interpretation (small – post signature)
- 9** Downtown Identification (*not shown*)
- 10** Facility / Landmark Identification (*not shown*)



Parks / Trails Identification

Welcoming Visitors to Parks and Trails

Successful identification of parks and trails is the primary objective of the new signage system. When visitors see access points they are more likely to use a park or enter a trail.

The choice of these 2-sided pylons depends on the size and importance of the park or trail in relationship to the entire system.

Primary entrance points will feature the wider pylon (Left). Secondary entrance point will use the narrower pylon (Right).

Wider pylons can provide additional recreational information in the form of pictograms.



1.A



1.B





Major Trailheads

Major trailheads may feature 3-sided slim profile pylons that include wayfinding and interpretive information as well as directional markers.

Such pylons can be used in larger park systems or extensive greenway trails—such as Simms Millennium Park—to enhance the visitor experience.

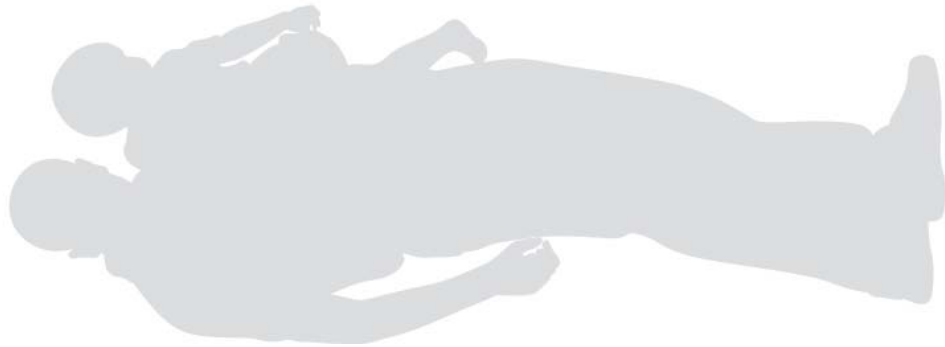
These are the same designs as the downtown pylons described in the Downtown Courtenay Wayfinding Manual.



Minor Trailheads

Small Park Trail Systems

Small parks may feature a network of trails, however they may not warrant the placement of a large pylon. The minor trailhead signs offer a simplified solution to feature the trail system and additional park etiquette information.



3



Parks / Trails / Urban Direction

Directional Options

These solutions feature options for various placements from midtrail, trailhead, street sidewalk to downtown plaza. Placement and choice of option is guided by the overall context these signs are placed into.

Direction
Midtrail Placement



4.A

Direction
Trailhead Placement



4.B

Direction
Street Sidewalk Placement



4.C

Direction
Downtown Plaza /
Key Decision Point
Placement



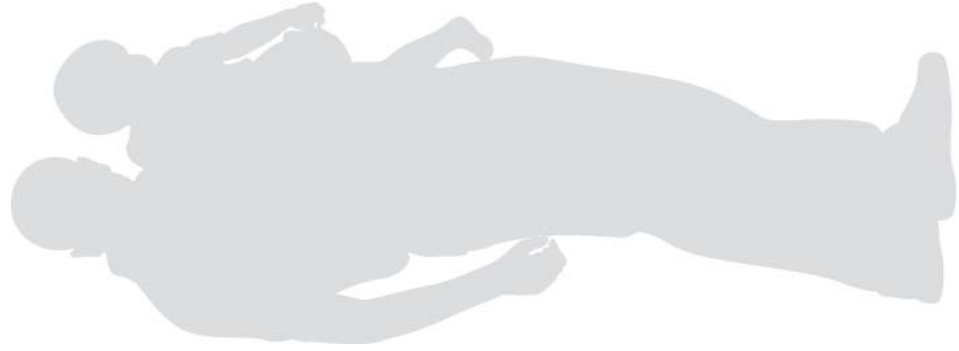
4.D







Parks / Trails Information

Post Markers and Dispensers

Consistent visual treatment of dog bag dispensers, distance information, regulatory pictograms reinforcing bylaws, boundary markers and mid-trail identifiers establishes a strong municipal brand along all trails.



Dispenser	Distance Marker incorporating Information / Regulation	Boundary Marker	Mid-Trail Identifier
 <p>5.A</p>	 <p>5.B</p>	 <p>5.C</p>	 <p>5.D</p>



Parks / Trails Information

Etiquette Signs

Safety, courtesy, etiquette and regulatory information can be provided on the same sign template for smaller parks, municipal facilities and playgrounds.



Parks	Facilities	Playgrounds	
 <p>Simms Millennium Park</p> <p>Park Hours Sun 10:00 - 5:00pm</p> <p>Park Etiquette: This is a public park sponsored by the municipality. Please respect the park rules and report damage or unsanitary conditions to www.courtenayparks.com</p> <p>In Case of Emergency: Call 9-1-1 or Call the Parks Department at 250-800-0000</p>	 <p>Johnson Tennis Court</p> <p>Court Rules Hours: Sun 10:00 - 5:00pm</p> <p>Court Etiquette: Starts each evening after 6:00pm except for times with scheduled games. To make a reservation and book for a court of 10:00pm please go to www.courtenaytennis.com</p> <p>In Case of Emergency: Call 9-1-1 or Call the Parks Department at 250-800-0000</p>	 <p>Rotary Playground</p> <p>Playground Rules Hours: Sun 10:00 - 5:00pm</p> <p>No Responsibility: Playgrounds are unattended. Please ensure that your child plays in a safe and courteous manner. Please leave the playground area as you found it. If you see any unsafe conditions or if your child is in danger, please call the City of Courtenay at www.courtenayparks.com</p> <p>In Case of Emergency: Call 9-1-1 or Call the Parks Department at 250-800-0000</p>	<p>A number of the sign classifications can accommodate sponsorship recognition opportunities, subject to City of Courtenay sponsorship branding guidelines.</p> <p>6.A</p> <p>6.B</p> <p>6.C</p>

Parks / Trails Regulation

Alerting Public to Regulations

Regulatory information is required in various settings. The prominence of the information will be determined based on the importance of the regulation.

Dogs are prohibited from baseball fields, for instance. Since they are game sites where large crowds gather, this information requires a large regulatory sign because it is an issue of safety.

On an urban trail, “do not feed wildlife” information is secondary to the “clean up after your dog” information since the presence of dog walkers on the trail will be higher than the presence of people who might feed wildlife.

The decisions over placement and prominence of regulatory information should be made based on location and the particular context of each site.



Regulation A
Post-Mounted



Regulation A
Fence-Mounted



Regulation B
Post-Mounted



7

5.B



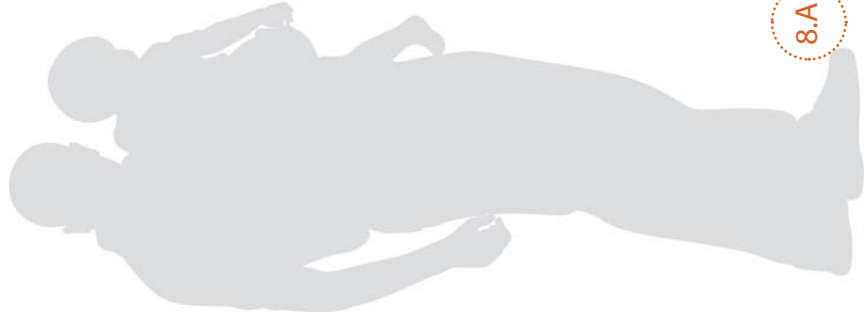
Interpretation (large)

Interpretation Pylon

Telling stories, provoking and inspiring, and addressing the senses all contribute to a rich visitor experience.

Effective interpretation can open the eyes and hearts of visitors. It makes visible what can't be seen, asks people to hear what they've never noticed, and can offer new viewpoints and inspire action.

Shown here is an interpretive pylon for a large park or urban plaza. This the same sign style for the Downtown Courtenay wayfinding pylons as described in the **Downtown Courtenay Wayfinding Manual**.



Interpretation (medium)

Wayside Panels

Many things can be discovered along a trail if we provide context. Magnifying and focusing on specific themes offers opportunities to enhance an experience, provoke thought and create an emotional response.

Wayside panels are a great way to feature specific themes with infographics, illustrations, maps or photographs.

Maintenance and operations considerations have been incorporated into sign design. For example, the mounts for all sign classifications are flush with the ground, allowing for easy grass mowing, where applicable. Shown at right, the interpretive panel can be easily installed and replaced, to reflect changing interpretation needs over time or to replace in the event of vandalism.





Interpretation (small)

Post Signature

In some instances there is not sufficient space for a large or medium scale interpretive feature or it is desired to focus on a specific aspect without interpretation taking priority over the actual experience. A small sign that provides just the basic information or that asks an inquiring question may be the most appropriate.



8.C

Downtown Identification

Entering the Downtown Core

The Downtown Core Identification signs are relevant to both the Business Improvement Association and the municipality.

The pylons are placed at strategic locations to announce the access to the core downtown area.



Front



Back





3.0 WAYFINDING ELEMENTS & HIERARCHY

Facility / Landmark Identification

Building Identification

Consistent facility and landmark identification improves visitor recognition and appreciation. The pylons may be free standing but could also be wall mounted.



10



The Elements

Introduction

The selected primary colours for the parks and municipal facilities are Teal and Green, from the City of Courtenay branding colour pallet, as shown below.

The full City of Courtenay branding colour pallet is shown at right.

Parks and Municipal Signage Primary Colours

Courtenay Teal

Cyan	100
Magenta	0
Yellow	28
Black	65
R	0
G	83
B	94

Courtenay Green

Cyan	50
Magenta	0
Yellow	100
Black	0
R	141
G	198
B	63



	<p>Pantone 3165C CMYK C100 / M0 / Y28 / K65 RGB R0 / G83 / B94 Hex# 00535e</p>		<p>Pantone 80% BLACK CMYK C0 / M0 / Y0 / K80 RGB R88 / G89 / B91 Hex# 58595B</p>
	<p>Pantone 180C CMYK C0 / M79 / Y100 / K11 RGB R217 / G83 / B30 Hex# D9531E</p>		<p>Pantone 376C CMYK C50 / M0 / Y100 / K0 RGB R141 / G198 / B63 Hex# 8DC63F</p>

The Elements

Typography

Open Sans Light

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz 1234567890

Open Sans Bold

**ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz 1234567890**

Myriad Pro Roman

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz 1234567890

Myriad Pro Bold

**ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz 1234567890**

Myriad Pro Condensed

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz 1234567890

Myriad Pro Bold Condensed

**ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz 1234567890**

Directional Elements

[illegible]



4.0 APPLICATIONS

Sample Methodology for a Complex Sign Project

The Process*

The following outlines a typical methodology and the roles of parties involved to replace existing signs and to develop new ones. It is often beneficial and more economical to replace and develop a number or series of signs to use funds efficiently.

*Note: process may vary depending on the scope of the project and availability of resources.

Phase 1 – Startup

Consultant

Meet on location with project authority to discuss sign requirements and gain key information regarding content and graphics, etc.; confirm all measurements of structures and signs as per guidelines

City of Courtenay

Provide key messages, materials, existing research material.

Phase 3 – Proofing

Consultant

After the signs are designed and the project authority has reviewed them, there will be time allotted for revisions (usually two rounds).

City of Courtenay

Provide comments / revisions and sign off on mount and sign design.

Phase 5 – Fabrication

Consultant or Sign Shop

Fabrication of client-approved signs.

City of Courtenay

Give final approval of fabrication estimate and work order.

Phase 6 – Installation

City of Courtenay

Install the structures and signs.

Phase 2 – Concept, Layout and Design

Consultant

Communicate on content, graphics, or photos that will be used. Develop one to two draft design concepts for the project authority to review.

City of Courtenay

Choose one direction and provide comments.

Confirm if structural signs may require engineered drawings.

Phase 4 – Demolition/Preparation

City of Courtenay

Remove existing structures (if applicable).

Clear the site of tall vegetation and undertake required steps for pouring a foundation (auger holes, haul in road crush or concrete, etc).



Practical Example: Bill Moore / Dogwood Park Signage

The placement matrix below and signs on the following pages show how to apply the process shown at left to a specific City park, including the rationale for each sign selected and the information details contained for each.

Placement Matrix



Signage Category

- 1** Park Identification
 - A** Park Identification (Major)
 - B** Park / Trail Identification (Minor)
- 2** Trailhead (Major)
- 3** Trailhead (Minor)
- 4** Parks / Trail / Urban Direction
 - A** Direction Mid-trail Placement
 - B** Direction Trailhead Placement
 - C** Direction Steet Sidewalk Placement
 - D** Direction Downtown Plaza /
- 5** Key Decision Point Placement
 - A** Parks / Trails Information
 - B** Dispenser
 - C** Distance Marker + Info / Regulation
 - D** Boundary Marker / Mid-trail Identifier
- 6** Parks / Trails Information
 - A** Parks
 - B** Facilities
 - C** Playgrounds
- 7** Parks / Trails Regulation
- 8** Interpretation
 - A** Interpretation (large – pylon)
 - B** Interpretation (medium – wayside panel)
 - C** Interpretation (small – post signature)
- 9** Downtown Identification (*not shown*)
- 10** Facility / Landmark Identification (*not shown*)

4.0 APPLICATIONS

Bill Moore / Dogwood Park Signage Example



Park Identification

A **major park identification sign (Left)** is placed at the Kilpatrick Avenue parking lot access and a **minor park identification sign (Right)** is placed at the Dogwood Drive trail access. Both signs are double-sided.



1.A



1.B





Bill Moore / Dogwood Park Signage Example

Wayfinding Maps at Trailheads

Wayfinding maps are placed at three access points to the parks. These maps help visitors to Dogwood Park and adjacent Bill Moore Memorial Park to identify main park features and locations.



3



3



3

Bill Moore / Dogwood Park Signage Example

Trail Identification and Direction

Signs provide directional aids, location of dog waste bags, information about trail distances and trail etiquette, and identify trail names and sponsors.

Front

Back

Front

Back



4.A



5.A



5.B



5.C





Bill Moore / Dogwood Park Signage Example

Etiquette and Regulatory Signs

The Bill Moore Memorial Park playground will feature an etiquette sign including safety and regulatory information. No Dogs signs are placed along the baseball field.



6.C



7

Bill Moore / Dogwood Park Signage Example

Interpretation Along the Trail
One or two interpretive signs placed along the Rotary Trail near the baseball park could feature content on the great blue heron and/or the railroad. For reference, a typical mockup is shown on the following page.





Bill Moore / Dogwood Park Signage Example

An example of an interpretive sign appropriate to the location (a colony of great blue herons rear their young in and adjacent to this park).

S P E C I E S T O E X P L O R E A N D P R O T E C T

THE GREAT BLUE HERON



Exceatam sam quodtat ex es expe dolum
ent eatibus dandica boreromnisci psant,
que lam rersper atempora corro verum
que invent lit omnimil luptas.

25
Amount of
herons sighted
in one season.

DID YOU KNOW?
Olupti venihic illacer spercium
licitatit apellaudis exceatam
sam quodtat ex es expe luptas.
tiur apellaudis exceatam sam
quodtat ex es expe luptas.

FINALLY, SUCCESS!
Olupti venihic illacer spercium
licitatit apellaudis exceatam sam
quodtat ex es expe dolum ent
eatibus dandica boreromnisci psant,
que lam rersper atempora corro
verum que invent lit omnimil luptas.
oditat ex es expe dolum ent eatibus
dandica boreromnisci psant, que
lam rersper atempora corro verum
que invenimil luptas.

MIGRATION
Olupti venihic illacer
spercium lictatit apella
udis exceatam sam quodtat
ex es expe dolum ent
eatibus dandica borer
o omnisci psant, que
lam rersper atempora.

... FICTION?
Venihic illacer spercium lictatit apellaudis
exceatam sam quodtat ex es expe luptas.

FACT OR...
Olupti venihic illacer spercium lictatit apudis
exceatam sam quodtat ex es expe luptas.

CITY OF
COURTENAY



4.0 APPLICATIONS

Inspection and Maintenance Form example

Complete this form while inspecting (an) existing interpretive sign(s).
Follow Steps 1 - 5 to complete the interpretive sign production process.

Inspection Details

INSPECTOR NAME

DEPARTMENT

POSITION

PHONE NUMBER

INSPECTION DATE

JOB NAME AND REASON

GENERAL INSPECTION LOCATION (PLEASE USE STREET NAMES / LANDMARKS OR GPS COORDINATES)

Inspection Description

SIGN TITLE

SIGN NUMBER (IF AVAILABLE)

AGE OF SIGN (IF AVAILABLE)

Type of sign:

☐ Regulatory

☐ Warning

☐ Information

☐ Interpretive

☐ Custom or Temporary

DESCRIBE OVERALL SIGN CONDITION

CONDITION OF INTERPRETIVE LAYER

CONDITION OF SIGN POSTS AND BASE PLATES

CONDITION OF CONCRETE FOUNDATION OR ANCHORING METHOD



PROJECT WORK ORDER / NAME

Recommendations

☐ No Action Required

☐ Cleaning and Minor Repairs

☐ Retrofit Information / Interpretive Layer

☐ Change Base / Structure

☐ Replace Entire Sign

☐ Remove Sign

PROVIDE A COST ESTIMATE TO EXECUTE ABOVE RECOMMENDATION

SIGNATURE

PRINT NAME

DATE



THE CORPORATION OF THE CITY OF COURTENAY

BRIEFING NOTE

To: Committee of the Whole

File No.: 0360-20

From: Councillor Doug Hillian, Chairperson, Finance Select Committee
(Council Select Committee on Alternative Asset Management
Funding Sources and Levels of Service Options)

Date: November 21, 2019

Subject: Finance Select Committee Interim Report No. 1 - 2019-11-21

ISSUE(S):

Recommendations from the Finance Select Committee (Council Select Committee on Alternative Asset Management Funding Sources and Levels of Service Options) within the attached meeting minutes and identification of a staff report addressing short-notice opportunity for the Grant-in-Aid program.

KEY CONSIDERATIONS:

- The Finance Select Committee members request the final reporting date assigned by its Terms of Reference (TOR) be amended as resolved in s. 4.01 of the October 25th, 2019 Finance Select Committee minutes (Attachment 1). Specifically, that Section 6 of the TOR be amended to read, *"...the Committee will submit its findings and recommendations in a written report to Council no later than January 6th, 2020"*.
- The Finance Select Committee members wish to identify for Council a short-notice opportunity to advantageously adjust the scheduling of the 2020 Grant-in-Aid program. This opportunity is explained and specific recommendations are made in the November 25th, 2019 staff report, "Grant-in-Aid and Other Forms of Financial Support Policy 1850.00.04 Revision". The report appears under "Staff Reports/Presentations" on the Committee of the Whole Agenda for November 25th, 2019.

Respectfully Submitted,

Councillor Doug Hillian,
Chairperson
Finance Select Committee
(Select Committee on Alternative Asset Management
Funding Sources and Levels of Service Options)

Attachment:

1. FSC1/2019 - Minutes: Finance Select Committee (Council Select Committee on Alternative Asset Management Funding Sources and Levels of Service Options, October 25, 2019)

FSC1/2019 - October 25, 2019

Minutes of a Finance Select Committee (Council Select Committee on Alternative Asset Management Funding Sources and Levels of Service Options) Inaugural Meeting held in the City Hall Council Chambers, Courtenay B.C., on Friday, October 25, 2019 at 12:00 p.m.

Attending:

Mayor: B. Wells
Councillors: W. Cole-Hamilton
 D. Frisch
 D. Hillian
 M. McCollum

Staff:

D. Allen, CAO
 T. Kushner, Director of Public Works Services/Assistant CAO
 D. Love, Senior Advisor Strategic Initiatives
 J. Nelson, Director of Financial Services
 R. Matthews, Executive Assistant
 W. Sorichta, Manager of Legislative & Corporate Administrative Services

1.00 CALL TO ORDER AND WELCOMING REMARKS

.01 Mayor Wells called the meeting to order and presented the Inaugural
 INAUGURAL Address.
 ADDRESS

2.00 INTRODUCTION OF COMMITTEE MEMBERS

.01 Mayor Wells introduced the appointed members of Council and members
 INTRODUCTION OF of staff participating on the Alternative Asset Management Funding
 FINANCE SELECT Sources and Levels of Service Options Council Select Committee
 COMMITTEE (Finance Select Committee):
 MEMBERS &
 PARTICIPANTS Mayor Wells, Councillors Cole-Hamilton, Hillian and McCollum, David Allen, Chief Administrative Officer, Trevor Kushner, Director of Public Works Services/Assistant CAO, Jennifer Nelson, Director of Financial Services, and Dave Love, Senior Advisor Strategic Initiatives.

3.00 COMMITTEE APPOINTMENTS

.01 Moved by Cole-Hamilton and seconded by McCollum that
 FINANCE SELECT Councillor Hillian be appointed Chairperson and Councillor Cole-
 COMMITTEE Hamilton be appointed Deputy Chairperson to the Alternative Asset
 CHAIRPERSON & Management Funding Sources and Levels of Service Options Council
 DEPUTY Select Committee (Finance Select Committee).
 CHAIRPERSON **Carried**
 APPOINTMENTS
 0550-20

Acting Chair Wells vacated the chair and Chair Hillian took the seat.

4.00 CONFIRMATION OF TERMS OF REFERENCE

.01
TERMS OF
REFERENCE (TOR) -
COUNCIL SELECT
COMMITTEE ON
ALTERNATIVE ASSET
MANAGEMENT
FUNDING SOURCES
AND LEVELS OF
SERVICE OPTIONS
(FINANCE SELECT
COMMITTEE)
0550-20

Moved by McCollum and seconded by Cole-Hamilton that the Alternative Asset Management Funding Sources and Levels of Service Options Council Select Committee (Finance Select Committee) adjust the timeline identified in *Section 6, Reporting*, of the *Terms of Reference* to read:

“...the Committee will submit its findings and recommendations in a written report to Council no later than **January 6th, 2020**”; and,

That the Finance Select Committee advise Council of the amendment to the timeline in Section 6 of the Terms of Reference at a future Council meeting.

Carried

5.00 ESTABLISH SCHEDULE OF MEETINGS

.01
ESTABLISH REGULAR
SCHEDULE OF
MEETINGS
0550-20

Moved by Cole-Hamilton and seconded by McCollum that the Alternative Asset Management Funding Sources and Levels of Service Options Council Select Committee (Finance Select Committee) meet on the following dates:

- Friday, November 15, 2019 10:00 a.m. - 12:00 p.m.
- Friday, November 29, 2019 10:00 a.m. - 12:00 p.m.

And; that the meeting dates be posted on the City of Courtenay website for public notification.

Carried

6.00 STAFF REPORTS/PRESENTATIONS

.01
DRAFT 2020 - 2023
SCHEDULE OF
GAMING FUNDS
DISTRIBUTION
1850-01

Moved by McCollum and seconded by Cole-Hamilton that based on the draft “2020 - 2023 Schedule of Gaming Funds Distribution” spreadsheet presented at the October 25, 2019 Finance Select Committee, that based on the estimated annual funds available, the Committee supports the following recommendation for the proposed schedule of annual gaming funds distribution:

- The City’s total annual grant-in-aid amount for distribution be reduced from \$100,000 to \$50,000 annually; and,

That the Committee’s recommended distribution of gaming funds be brought forward in a future report to Council for Council’s consideration as part of the City of Courtenay 2020-2024 Financial Plan.

Carried with Chair Hillian opposed

New motion:

Moved by Cole-Hamilton and seconded by McCollum that it is a recommendation of the Finance Select Committee that staff increase the annual infrastructure reserve budget to a total of \$220,800.

Carried

.02

GRANT-IN-AID AND
OTHER FORMS OF
FINANCIAL SUPPORT
POLICY NO.
1850.00.04
REVISION
1850-00

Moved by McCollum and seconded by Cole-Hamilton that based on the draft staff report, “Grant-in-Aid and Other Forms of Financial Support Policy 1850.00.04 Revision”, the Finance Select Committee recommends:

That Council support OPTION 1 which states:

- Council to defer the approval of the Provision of Grant-in-Aid and Other Forms of Financial Support policy 1850.00.04
- Staff be directed to pursue the “Flow-Through Funds” opportunity with the Comox Valley Community Foundation for the 2020 grant year
- Staff be directed to update the City website to inform applicants that the City will not be receiving Grant-in-Aid applications in 2019 for 2020.

Carried

The Finance Select Committee meeting recessed at 1:31 p.m.

The meeting reconvened at 1:41 p.m.

7.00 INTERNAL REPORTS AND CORRESPONDENCE FOR INFORMATION

8.00 NEW BUSINESS

.01

PROPOSED
FINANCE SELECT
COMMITTEE AGENDA
ITEMS
NOVEMBER 15 & 29,
2019 MEETINGS
0550-20-03

The Finance Select Committee unanimously agreed to approve the following agenda items for discussion as follows:

- November 15, 2019 - Borrowing Process Discussion
 - Future Capital Project/Debt Impact Review (2019-2023 Financial Plan)
- November 29, 2019: Business Case Review
 - New Public Works Administration Building/New Satellite Fire Hall

9.00 ROUND TABLE/COMMITTEE INITIATIVES

10.00 ADJOURNMENT

.01 The meeting adjourned at 1:54 p.m.

CERTIFIED CORRECT

**_____
Chairperson - Alternative Asset Management Funding Sources and
Levels of Service Options Council Select Committee (Finance Select
Committee)**

Adopted this 15th day of November, 2019

**_____
Corporate Officer/Deputy Corporate Officer**

