



ART GALLERY OF NOVA SCOTIA AND NOVA SCOTIA COLLEGE OF ART AND DESIGN UNIVERSITY

Co-Location Facility and Feasibility Study
Final Report

March 2018

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EXECUTIVE SUMMARY

The Art Gallery of Nova Scotia (AGNS) and the Nova Scotia College of Art and Design (NSCAD) University have both long endured inadequate, inefficient and expensive to operate buildings. Both have also long sought new sites and facilities. For the AGNS, a new site and building would enable it to show more of the province's permanent collection, better serve residents and visitors, meet the needs of regional artists and the expectations of donors who would like to see more works on display. NSCAD, as a principal centre for research and higher learning in visual arts and culture in North America, has identified a new site and facilities as important to initiatives to increase enrollment levels and accessibility and to better achieve its academic and associated objectives.

Over the years, both the AGNS and NSCAD have separately explored opportunities for new sites and facilities and are now contemplating a co-location on the Salter Block of the Halifax central waterfront. While there has been a history of cooperation, a co-location should enable greater levels of collaboration and partnership between the two institutions. The co-location is intended to be a vibrant hub of innovation that will celebrate the rich arts and cultural heritage of Nova Scotia. It will bring together a community of academic research and studio practice, and serve as a catalyst for cultural and economic development on the waterfront.

While the co-location should result in capital and operating cost efficiencies, its greatest impact will be the potential for a centre of excellence that benefits both institutions, the City of Halifax and the Province of Nova Scotia. It is an opportunity to transform a parking lot on the waterfront of Halifax into a dynamic destination for creative innovation and contribute to the profound transformational changes remaking the city. It has the potential to concentrate specialized facilities and technical expertise in world-class, custom-built facilities that can maximize the potential impact of local, provincial, and national investments. The possibilities for innovation are far greater in a new paradigm when the two institutions work together.

The Art Gallery of Nova Scotia and NSCAD University have worked collaboratively over their respective histories. This shared mindset and mutual support of the arts and creative industries has allowed for partnership to blossom between the two institutions. Obvious links exist, such as AGNS providing exhibitions and curatorial support to artists teaching at the University, and AGNS employing students to teach its summer classes. Other rich opportunities have also developed including internships and shared lectures. The opportunity for co-location provides physical closeness for an already existing partnership between institutions. It is, however, not critical for the partnership's success, as the institutions will continue this shared path regardless of location.

The conclusions, recommendations, assumptions and projections in this study are based on contextual, comparables and market analyses detailed within the report. The core planning assumptions that underlie the co-location are as follows:

- The separate missions and governance structures of AGNS as a provincial art gallery and NSCAD as a degree granting educational institution will continue and necessitate the need for all spaces to be separately owned. Doing so will simplify the capital fundraising to allow for each institution to collaborate but raise its own capital funds.
- The essential concept of the co-location of the AGNS and NSCAD is one of horizontal integration in which the two facilities are side by side with some spaces owned by one and used by the other. Verticality is assumed to be within each separate institution.
- Although all spaces will be separately owned the co-location will help to reduce the space requirements and therefore lower capital and operating costs for both institutions.
- The galleries of the AGNS will remain primarily charged admission while the NSCAD galleries will continue to offer free admission.
- It has been agreed that the two institutions will not pay to use the spaces of the other. Rather, based on a positive spirit of collaboration and assuming the trade-offs are of about equal value, the underlying concept is one of barter.
- It is assumed that a Committee to include an equal number of representatives from AGNS and NSCAD, plus a designated person from within the Nova Scotia government, will address any disagreements that might arise both during construction and ongoing operations.

Regarding the attendance and financial impact of the co-location, two summary tables follow. The first focuses on projected attendance, operating revenues and expenses for the AGNS in its opening three years of operation. The projections are in two scenarios. One assumes that AGNS is a stand-alone institution on the Salter Block site, the other assumes a colocation with NSCAD on the same site. The second table summarizes the operating revenue and expense projections for NSCAD assuming the co-location with AGNS.

For **AGNS**, the annual attendance levels are estimated to be about 90,000 in the stabilized Year 3 assuming the stand-alone scenario, and 95,000 assuming a co-location with NSCAD, with the difference in large part because of the easier access by NSCAD students. This may be compared to the 37,000 current visitor range. Year 1 attendance is projected at 105,000 and 110,000, respectively, with a normal decline in the subsequent years.

The total AGNS annual operating budget, in 2017 dollars, is estimated to be in the range of \$5.5 million in the stand-alone scenario, compared to the FY2016 base level operating budget of about \$3.6 million. Operating expenses are estimated to be lower by over \$200,000 per year assuming the staffing and other efficiencies and economies of the co-location scenario. The additional operating revenues attributable to the co-location are not substantial because the additional attendance is largely from free admission and relatively low-spending NSCAD students.

Not surprisingly, the additional staff and other operating costs associated with a larger and enhanced AGNS facility exceed the additional revenues that may be generated on the waterfront Salter Block site. Accordingly **the additional amount that will be required from a combination of government, endowment and private sources will be in the range of \$808,000 to \$872,000 in the stand-alone scenario and \$586,000 to \$637,000 assuming the co-location with NSCAD. On balance the financial benefit to the AGNS of a co-location with NSCAD ranges from about \$216,000 to \$235,000.**

For **NSCAD** the core assumption that influences the revenue and expense projections is that the co-location on the waterfront Salter Block site will lead to increased enrollment and therefore tuition and associated revenue that will exceed the additional costs associated with the enrollment growth. Another other major impact on the projections for NSCAD is a substantial reduction in space and the reduced occupancy costs in the co-location relative to the energy inefficiency and high maintenance costs associated with the current Fountain and Academy campuses, which do not meet modern accessibility standards. The net impact is an **operating surplus in the range of \$174,000 to \$387,000 per year.**

It must be recognized that the increased enrollment and elimination of the Fountain Campus debt would be applicable in any relocation scenario for NSCAD assuming no new capital debt at a new site. As with AGNS, the benefits of co-location are less financial than they are about the synergies that result from the two institutions sharing the same site.

| Summary of Projections (rounded) | Base Level | Year 1 | Year 2 | Year 3 | Year 1 | Year 2 | Year 3 | | Year 3% | Year 3% |
|--|---------------------------|--------------------|--------------------|---------------------------------|--------------------|--------------------|--------------------|---------------|---------------|---------------|
| Art Gallery of Nova Scotia | AGNS Stand-Alone Scenario | | | AGNS/NSCAD Co-Location Scenario | | | Base Level | Stand Alone | Co-Located | |
| Total Attendance | 37,000 | 105,000 | 95,000 | 90,000 | 110,000 | 100,000 | 95,000 | | | |
| Revenues | | | | | | | | | | |
| Admissions | \$103,300 | \$574,324 | \$519,626 | \$492,278 | \$601,673 | \$546,975 | \$519,626 | 2.9% | 9.0% | 9.8% |
| Retail Sales | \$129,200 | \$341,250 | \$313,500 | \$301,500 | \$346,500 | \$320,000 | \$308,750 | 3.7% | 5.5% | 5.8% |
| Paid Memberships | \$48,000 | \$132,000 | \$123,420 | \$120,166 | \$134,750 | \$126,225 | \$123,027 | 1.4% | 2.2% | 2.3% |
| Café Concession | \$18,000 | \$30,000 | \$30,000 | \$30,000 | \$30,000 | \$30,000 | \$30,000 | 0.5% | 0.5% | 0.6% |
| Facility Rentals | \$52,900 | \$220,000 | \$229,204 | \$241,403 | \$220,000 | \$244,912 | \$258,050 | 1.5% | 4.4% | 4.9% |
| Public and Educational Programs | \$88,800 | \$177,600 | \$181,152 | \$184,775 | \$186,480 | \$190,210 | \$194,014 | 2.5% | 3.4% | 3.7% |
| Fundraising Events (net) | \$49,200 | \$100,000 | \$125,000 | \$125,000 | \$100,000 | \$125,000 | \$125,000 | 1.4% | 2.3% | 2.4% |
| Other Earned/Miscellaneous | \$41,300 | \$55,000 | \$60,000 | \$65,000 | \$55,000 | \$60,000 | \$65,000 | 1.2% | 1.2% | 1.2% |
| Existing Endowment Income | \$83,800 | \$83,800 | \$83,800 | \$83,800 | \$83,800 | \$83,800 | \$83,800 | 2.4% | 1.5% | 1.6% |
| Existing Private Support | \$521,000 | \$521,000 | \$521,000 | \$521,000 | \$521,000 | \$521,000 | \$521,000 | 14.8% | 9.5% | 9.8% |
| Existing Governmental Support | \$2,433,000 | \$2,433,000 | \$2,433,000 | \$2,433,000 | \$2,433,000 | \$2,433,000 | \$2,433,000 | 69.1% | 44.5% | 45.9% |
| Total Revenue | \$3,568,500 | \$4,667,974 | \$4,619,702 | \$4,597,922 | \$4,712,203 | \$4,681,122 | \$4,661,267 | 101.4% | 85.2% | 85.0% |
| Expenses | | | | | | | | | | |
| Salaries, Wages, Benefits | \$2,152,000 | \$3,008,040 | \$3,023,080 | \$3,038,196 | \$2,852,040 | \$2,866,300 | \$2,880,632 | 61.2% | 55.5% | 54.4% |
| Occupancy | \$55,200 | \$88,396 | \$88,396 | \$88,396 | \$84,378 | \$84,378 | \$84,378 | 1.6% | 1.6% | 1.6% |
| Exhibitions | \$329,100 | \$832,500 | \$849,150 | \$866,133 | \$817,500 | \$833,850 | \$850,527 | 9.4% | 15.8% | 16.1% |
| Programs | \$99,300 | \$213,120 | \$217,382 | \$221,730 | \$223,776 | \$228,252 | \$232,817 | 2.8% | 4.1% | 4.4% |
| Conservation/Collections Care | \$142,600 | \$180,000 | \$185,000 | \$190,000 | \$180,000 | \$185,000 | \$190,000 | 4.1% | 3.5% | 3.6% |
| General & Administrative | \$231,800 | \$391,045 | \$362,770 | \$364,583 | \$370,765 | \$343,956 | \$345,676 | 6.6% | 6.7% | 6.5% |
| Marketing | \$73,300 | \$210,000 | \$171,000 | \$162,000 | \$220,000 | \$180,000 | \$171,000 | 2.1% | 3.0% | 3.2% |
| Development | \$56,900 | \$115,000 | \$120,000 | \$125,000 | \$115,000 | \$120,000 | \$125,000 | 1.6% | 2.3% | 2.4% |
| Retail Cost of Goods Sold | \$145,700 | \$204,750 | \$188,100 | \$180,900 | \$207,900 | \$192,000 | \$185,250 | 4.1% | 3.3% | 3.5% |
| Other Expenses | \$233,000 | \$233,000 | \$233,000 | \$233,000 | \$233,000 | \$233,000 | \$233,000 | 6.6% | 4.3% | 4.4% |
| Total Expenses | \$3,518,900 | \$5,475,851 | \$5,437,878 | \$5,469,938 | \$5,304,359 | \$5,266,736 | \$5,298,279 | 100.0% | 100.0% | 100.0% |
| Additional Amount Required from Endowment, Private and Government Sources to Break Even | \$49,600 | (\$807,877) | (\$818,176) | (\$872,016) | (\$592,157) | (\$585,614) | (\$637,012) | 1.4% | -14.8% | -15.0% |

| Summary of Projections (rounded) | Base Level | Year 1 | Year 2 | Year 3 | | |
|---------------------------------------|---------------------------------|---------------------|---------------------|---------------------|---------------|---------------|
| Nova Scotia College of Art and Design | AGNS/NSCAD Co-Location Scenario | | | | Base Level | Co-Located |
| Revenues | | | | | | |
| Retail Sales | \$325,000 | \$132,000 | \$125,000 | \$123,500 | 1.8% | 0.7% |
| Facility Rentals | \$500,000 | \$13,000 | \$14,740 | \$16,000 | 2.8% | 0.1% |
| Extended Studies | \$312,500 | \$343,750 | \$350,000 | \$360,000 | 1.7% | 2.0% |
| Other Earned/Miscellaneous | \$192,300 | \$200,000 | \$210,000 | \$220,000 | 1.1% | 1.2% |
| Tuition, Student Fees | \$5,889,500 | \$6,795,750 | \$7,248,800 | \$7,701,850 | 32.7% | 42.1% |
| Existing/Assumed Private Support | \$28,700 | \$28,700 | \$28,700 | \$28,700 | 0.2% | 0.2% |
| Existing/Assumed Operating Grant | \$8,309,000 | \$8,733,000 | \$8,820,000 | \$8,908,000 | 46.1% | 48.6% |
| Existing/Assumed Facility Grant | \$2,279,000 | \$1,142,500 | \$1,142,500 | \$1,142,500 | 12.7% | 6.2% |
| Existing/Assumed Other Grants | \$174,000 | \$174,000 | \$190,000 | \$200,000 | 1.0% | 1.1% |
| Total Revenue | \$18,010,000 | \$17,562,700 | \$18,129,740 | \$18,700,550 | 100.0% | 102.1% |
| | | | | | | |
| Expenses | | | | | | |
| Salaries, Wages, Benefits | \$11,792,600 | \$12,528,452 | \$12,691,094 | \$12,854,550 | 65.5% | 70.2% |
| Occupancy | \$2,268,500 | \$1,573,560 | \$1,657,260 | \$1,740,960 | 12.6% | 9.5% |
| Programs | \$269,000 | \$412,500 | \$420,000 | \$432,000 | 1.5% | 2.4% |
| General & Administrative | \$1,485,500 | \$1,879,268 | \$2,030,575 | \$2,185,273 | 8.2% | 11.9% |
| Marketing | \$84,100 | \$150,000 | \$225,000 | \$260,000 | 0.5% | 1.4% |
| Retail Cost of Goods Sold | \$207,500 | \$79,200 | \$75,000 | \$74,100 | 1.2% | 0.4% |
| Port Debt Repayment | \$766,200 | \$766,200 | \$766,200 | \$766,200 | 4.3% | 4.2% |
| Fountain Debt Repayment | \$1,136,600 | \$0 | \$0 | \$0 | 6.3% | 0.0% |
| Total Expenses | \$18,010,000 | \$17,389,180 | \$17,865,129 | \$18,313,083 | 100.0% | 100.0% |
| Operational Surplus | \$0 | \$173,520 | \$264,611 | \$387,467 | | |

1. INTRODUCTION

This chapter summarizes the vision for, background to, purpose and methodology to date of this facility and feasibility study for the co-location of the Art Gallery of Nova Scotia (AGNS) and the Nova Scotia College of Art and Design (NSCAD) University on the central waterfront Salter Block site in Halifax.

1.1 VISION FOR, BACKGROUND TO, AND PURPOSE OF THIS STUDY

The Vision for a New Paradigm

The AGNS and NSCAD view the opportunity for a co-location to be a principled approach to leveraging the past to build the future. They both believe that new co-located facilities will enable greater collaboration and partnership between the two institutions. It will bring together a community of academic research and studio practice; a modern and engaging presentation of the Art Gallery of Nova Scotia art and artefacts collections, exhibits and archives; opportunities for business and cultural entrepreneurship; a sense of pride for government, community and social organizations. They see it as a new paradigm and that “we are better together”.

A Vibrant Hub of Innovation

An arts and cultural collision space that promotes collective engagement and excitement, these new facilities will be a catalyst for cultural and economic development on the waterfront. The co-location is intended to be a vibrant hub of innovation that will celebrate the rich arts and cultural heritage of Nova Scotia and delight and inspire all participants.

The value of both organizations’ revitalized programming will engage wider community participation through public outreach to deliver a transformational experience. Through major public art exhibitions, lectures, creative interactive making, in a high profile venue, art and technology investigations will enable and advance innovation, strengthen education, partnerships and an understanding and awareness of arts and culture.

A Re-Imagined Vision

The Art Gallery of Nova Scotia and NSCAD University recognize that each share unique challenges and opportunities and are both ready to construct new facilities. With collective years of distinction, AGNS and NSCAD wish to present a bold and re-imagined vision to collaborate and build an art and culture destination for Nova Scotia. A signature waterfront location will provide the opportunity to create an outstanding and inspirational facility on the water's edge with excellent visibility from the harbour and waterfront. An adjacent public plaza for events and activities, accessible pedestrian traffic from the Boardwalk to the facility, will connect to a dynamic cluster of shared spaces.

The potential co-location of the AGNS and NSCAD University is an opportunity to transform a parking lot on the waterfront of Halifax into a dynamic destination for creative innovation and contribute to the profound transformational changes remaking the city. The co-location should result in capital and operating cost efficiencies, but its greatest impact will be the potential for a centre of excellence that benefits both institutions, the City of Halifax and the Province of Nova Scotia. While a co-location is a new concept, collaboration between the two institutions has in fact been in place for a century, dating back to when Group of Seven artist Arthur Lismer was both Principal of the predecessor Victoria School of Art and Design and the Chief Curator of the then Nova Scotia Museum of Fine Arts. Over the years works of art from NSCAD alumni and faculty have been shown in AGNS exhibitions and NSCAD students benefit from internships, project based assignments and free of charge access to AGNS collections. The AGNS also provides collections storage facilities for NSCAD and there have been other community based and mutually beneficial collaborations.

The co-location of two significant provincial arts institutions has the potential to concentrate specialized facilities and technical expertise in world-class, custom-built facilities which maximizes the potential impact of local, provincial, and national investments. The AGNS and NSCAD co-location reveals the values and passion that drive contemporary arts research and creative practice: social innovation, environmental sustainability, technological advancement, social justice and community building with sensitivity to the transformative power of the creative imagination and human potential. The possibilities for innovation are far greater when the two institutions work together.

The Need for New Facilities

The need for new facilities for both AGNS and NSCAD is very clear. The AGNS is an important showcase for the visual arts within Atlantic Canada but has long outgrown its current 67,000 gross sq. ft., inefficient and expensive to operate facilities, of which only about 19,500 net sq. ft. is exhibition space. Numerous studies over the years have concluded that the current space is unsuitable for an art gallery.

A new site and building would enable the AGNS to show more of the province's permanent collection, better serve residents and visitors, meet the needs of regional artists and the expectations of donors who would like to see more works on display. A new facility will also encourage collections to remain in Nova Scotia rather than be donated to galleries in Ottawa, Toronto or elsewhere.

NSCAD University is a principal centre for research and higher learning in visual arts and culture in North America. It has operated for 130 years and currently occupies three unique campuses in downtown Halifax. The Fountain campus at 175,000 sq. ft. is an interconnected row of 19 former Victorian era merchant shops and warehouses. The Academy Building with a focus on research, film and media was added in 2003, a short walk from the main campus in an 1878 former high school and includes 25,000 square feet of space. Given the very advanced age of these facilities it is not surprising that there is a deferred maintenance backlog of an estimated \$25 to \$30 million associated with these historic buildings. In addition, both of these buildings are inaccessible and it would cost upwards of \$40-\$50 million to retrofit them to meet modern accessibility standards.

It is the objective of NSCAD to sell both of these campuses and relocate to a single waterfront facility in partnership with the AGNS and retain its 70,000 sq. ft. industrial-focused Port Campus. The President of NSCAD has written that the co-location will help the university to “reaffirm our place as Canada’s premier school of the visual arts, craft and design.”¹

Opportunities for Sharing

Although the purpose of the AGNS and NSCAD are distinct, they are also complementary. The primary objective of a co-location is to create an innovative collaboration that marries the strengths of each institution, increasing the likelihood for implementation and ongoing sustainability of needed new facilities for both AGNS and NSCAD. A co-location is seen to be a means of bringing together academic research with studio practice and exhibition and programming opportunities for students and the general public, including both residents and tourists. The co-location suggests additional internship opportunities for NSCAD students at the AGNS and other opportunities that have or will be developed. These could include:

- Residencies for both student and professional artists;
- The development of an archive and library that is international in scope;
- Learning commons that provide scope for different *kinds* of exhibitions;
- Shared technical resources in studios and exhibition management
- Larger cultivation of the broader public through the gift shop, bringing about a larger audience and connoisseurship.

In part, this study entails an update to the facility plan conducted by Lord Cultural Resources for the AGNS in 2008 and the business plan and projections study completed for AGNS in 2012. It adds analyses associated with an assumed co-location with NSCAD, taking into account both the synergies possible in a co-location and the reality that AGNS is a public art gallery and NSCAD is an institution of formal education with a different governance and funding structure that will need to be maintained. There is therefore a need for continued separate identities and the planning of spaces that will be separate but also owned by one of the two institutions and used by the other.

¹ One Nova Scotia Arts and Cultural Destination (NSCAD University, September 2016) p. 1.

The Art Gallery of Nova Scotia and NSCAD University have worked collaboratively over their respective histories. This shared mindset and mutual support of the arts and creative industries has allowed for partnership to blossom between the two institutions. Obvious links exist, such as AGNS providing exhibitions and curatorial support to artists teaching at the University, and AGNS employing students to teach its summer classes. Other rich opportunities have also developed including internships and shared lectures. The opportunity for co-location provides physical closeness for an already existing partnership between institutions. It is, however, not critical for the partnership's success, as the institutions will continue this shared path regardless of location.

This facility and feasibility study is intended to provide the information needed to enable decisions to be made regarding whether or not to proceed to detailed site planning, architectural design, capital cost estimates and a fundraising feasibility assessment. The study is led by Ted Silberberg, the Lord Cultural Resources Senior Principal responsible for Market and Financial Planning, assisted by Senior Consultants Marina Ramirez (facility planning) and Christina Sjoberg (human resources and visitor experience), Co-President Barry Lord, Senior Consultant (business planning) Sarah Hill, and Research Consultant Maureen Marshall.

1.2 SCOPE OF WORK AND METHODOLOGY

In order to meet the objectives of this study we carried out the following work elements. We:

- Reviewed and analyzed background material provided to us as well as additional data that we gathered. This includes facility, collections, operational and financial data and annual reports provided by each of the institutions along with the following previous planning studies:
 - *Assessment of Buildings and Options for Expansion for the Art Gallery of Nova Scotia* (Lord Cultural Resources, March 2008)
 - *Operational Feasibility Study for New Site and Building: Art Gallery of Nova Scotia* (Lord Cultural Resources, WHW Architects, A.L. Arbic Consulting, and RBR Development Associates, 2012)
 - *One Nova Scotia Arts and Cultural Destination* (NSCAD University, September 2016).
 - *Assessment of Development Potential: Salter and Foundation Blocks, Halifax, NS* (Cantwell & Company and Fairwyn Developments, October 2016)
 - *NSCAD University Space Study* (Lydon Lynch Architects, Educational Consulting Services, 2016)
- Toured the AGNS and all three current campuses of NSCAD, as well as the waterfront Salter Block and areas around them.

- Facilitated two Visioning/Assumptions workshops. The first was with senior management and Board members from both AGNS and NSCAD and focused on strategic issues, opportunities and constraints. The second workshop combined other staff of both institutions to focus on a variety of specific operational issues.
- Analyzed contextual data regarding the overall museums marketplace in Nova Scotia, Canada and the US, art galleries/museums in relation to other museum types as well as published data regarding the art galleries of Canadian universities and colleges. These analyses are set out in Chapter 2.
- Analyzed data and interview feedback regarding the market for the existing AGNS and NSCAD operations, as well as potential resident, school and tourist markets for Halifax, which are set out in Chapter 3.
- Prepared a Phase 1 report, which detailed the analyses, conclusions and recommendations/assumptions in this study and helped to finalize the preliminary assumptions in Chapter 4. The assumptions are preliminary because they are subject to modification in future site and facility planning. The assumptions form the basis for attendance and financial projections for AGNS and NSCAD, assuming both a co-location and a stand-alone AGNS on the Salter Block site.

Bold italics are used throughout the document to highlight key findings, conclusions and recommendations or assumptions.

2. CONTEXTUAL AND COMPARABLES ANALYSES

The Art Gallery of Nova Scotia (AGNS) is a charged admission public art gallery displaying the works of professional artists from within and outside Nova Scotia. The Nova Scotia College of Art and Design (NSCAD) University is an institution of higher learning that includes modest free admission galleries that feature largely student works. The contextual and comparables analyses in this chapter are therefore focused on benchmarks to help guide the recommendations/assumptions in this report and the attendance, operating revenue and expense projections primarily for the AGNS. The following available data are considered:

- The overall museums marketplace in Nova Scotia, Canada and the United States, including comparisons of art galleries to other museum types and to data for the AGNS and NSCAD;
- The experience of Canadian university art galleries;
- The experience of the main existing waterfront museums in Halifax.

2.1 THE ART GALLERY/MUSEUM MARKETPLACE

A co-located AGNS and NSCAD should result in higher attendance and earned income and operating cost efficiencies. However, it is important to understand attendance and financial data for art and other museum types to help establish realistic attendance, operational and financial expectations. Both Canadian and US data follow.

2.1.1 ART GALLERIES WITHIN THE NOVA SCOTIA, CANADIAN AND US MUSEUM MARKETPLACE

The following table indicates what we term the “realities of the museum marketplace.” The primary objective is to convey that even with new, higher quality facilities on a great waterfront site, and the benefits of co-location, the extent of the likely increase in attendance and earned income levels must be realistic. The table offers realistic benchmarks from small, medium and large art galleries and museums Nova Scotia, Canada and the United States. Among the most relevant data² are the following points compared to data for the current AGNS and Anna Leonowens gallery operations. More detailed information regarding the AGNS and Anna Leonowens Gallery are set out in the following chapter:

- **Attendance:** The AGNS has averaged about 37,000 annual visitors in recent years. This is lower than the average and median figures for Canadian and US art galleries/museums set out in the table below. About 60% of AGNS visitors pay admissions. The Anna Leonowens Gallery reports about 12,000 visitors, all free admission. ***There are clearly opportunities to increase attendance levels at both galleries but the projected extent of the increase must be realistic and planning for the new co-located facility will need to take the different charge basis for each into account.***
- **School Groups as Percentage of Total Visitors:** The AGNS reports about 16% of its visitors are in school groups. This is a higher percentage than the benchmarks in the table below and may either reflect a very successful school program or weakness in attracting non-school market segments. The new facility should increase overall attendance and should cause the school group percentage to decline. The Anna Leonowens Gallery reports school groups at only 2% of its total attendance. This percentage should increase substantially as school groups attracted to the AGNS are exposed to the Anna Leonowens Gallery.
- **Memberships:** The 2,390 memberships at the AGNS is substantial but it must be understood that it is inflated by offering free membership to all permanent collection artists and to all NSCAD students. This causes it to be much higher than the comparative Canadian and US gallery figures in the table. NSCAD does not have a membership program for its galleries and it is not recommended that the co-location lead to the introduction of one.
- **Staffing Levels:** The AGNS currently has a full-time staff of 33, supported by 3.2 FTE part-time staff, 78 regular and 120 periodic volunteers, which is within the range expected of art galleries in Canada with similar operating budgets in the following table. In contrast the NSCAD galleries are staffed by 2 FTE personnel supported by students. ***The co-location should allow for a more substantial level of staff collaboration to benefit both institutions.***

²The Canadian data are averages and the US are medians.

- **Volunteers:** The AGNS reports 78 regular and 120 periodic volunteers, which exceeds the average and median figures for Canadian and US art galleries/ museums shown in the following table. NSCAD reports no formal volunteers for its galleries. The trend in Canada has been a decline in the percentage of Canadians who volunteer their time to any cultural or recreational organizations, as reported in the Canadian Index of Wellbeing.³ However, the increasing retirement and longevity of the large baby boom generation should increase volunteer levels in the coming years. It is likely that ***the excitement generated for the new co-located facility should increase volunteer support levels for AGNS further and also expose potential volunteers to opportunities at the Anna Leonowens Gallery. The co-location will also result in modestly paid internship opportunities for NSCAD students at the AGNS.***
- **Sources of Operating Revenue:** The AGNS reports that about 52% of its operating revenues are from the provincial government plus in-kind support from the province. Including other governmental support it is about 56% government support, which is in the same general range as other larger art galleries in Canada. In the United States non-earned income support is primarily from private sources. ***The AGNS should be able to increase earned income levels in the new facility.***
- **Sources of Operating Expenses:** Staffing costs in both Canada and the United States are generally in the range of 50% of total operating costs. For the AGNS it is about 55% and within the common range.

³ <https://uwaterloo.ca/canadian-index-wellbeing/>

REALITIES OF THE MUSEUM MARKETPLACE – NOVA SCOTIA

| | Small NS M&AG | Medium NS M&AG | Large NS M&AG | All NS M&AG | Canada Museum | Canadian Art Galleries | All Canadian Heritage Institution | US Art Galleries | All US Museums |
|--------------------------------------|---------------------|----------------------|---------------------|-------------------|------------------|------------------------------|--|---------------------|-------------------|
| Sample Size | 79 | 28 | 6 | 113 | 1,088 | 196 | 1,974 | 156 | 671 |
| Attendance | 2,881 | 11,199 | 41,904 | 7,014 | 23,019 | 56,451 | 31,336 | 44,878 | 26,500 |
| School Groups as % of Total | 5.7% | 22.4% | 6.5% | 12.5% | 8.5% | 6.4% | 6.0% | 8.4% | 12.3% |
| Members | 45 | 233 | 922 | 138 | 374 | 2,143 | 767 | 999 | 795 |
| Total Full-time Staff | 0.4 | 2 | 19 | 2 | 4 | 10 | 6 | 15 | 7 |
| Total Part-time Staff | 2 | 6 | 22 | 4 | 7 | 12 | 9 | 9 | 5 |
| Total Contract Workers | 0.2 | 1 | 2 | 0 | 2 | 5 | 2 | N/A | N/A |
| Total Volunteers | 15 | 37 | 67 | 23 | 49 | 82 | 52 | 100 | 65 |
| Sources of Operating Revenues | | | | | | | | | |
| Earned Income as % Total | 47.1% | 30.0% | 22.8% | 27.0% | 37.0% | 29.6% | 36.4% | 21.5% | 27.6% |
| Government Sources % | 37.5% | 60.3% | 64.7% | 60.9% | 49.4% | 44.6% | 49.4% | 13.3% | 24.4% |
| Private Donations % | 12.6% | 9.5% | 10.6% | 10.5% | 11.4% | 24.1% | 12.7% | 46.6% | 36.5% |
| Interest/Endowment % | 2.9% | 0.3% | 1.9% | 1.6% | 2.3% | 1.7% | 1.6% | 18.6% | 11.5% |
| Total Operating Revenue | \$40,430 | \$276,357 | \$3.5million | \$283,496 | \$838,000 | \$2.2million | \$1.1million | \$2.4 million | \$1.2million |
| Sources of Operating Expenses | | | | | | | | | |
| Staffing | 36.9% | 41.3% | 49.4% | 45.7% | 47.3% | 42.4% | 47.5% | 48.6% | 49.9% |
| Occupancy | 17.3% | 8.3% | 13.4% | 12.2% | 13.1% | 8.8% | 12.0% | N/A | N/A |
| Collections Care | N/A | N/A | N/A | N/A | N/A | N/A | N/A | 6.4% | 8.0% |
| Marketing | 2.0% | 2.3% | 4.0% | 3.3% | 3.5% | 3.9% | 3.1% | 4.4% | 4.1% |

Source: 2013 Canadian Heritage Report and 2013 Special Report on Museums & Art Galleries by Size and Province/Territory; 2005 National Survey of American Alliance of Museums
Note: *Museums categorized as small have annual revenue of under \$100,000; medium \$100,000 to \$999,999; large \$1million+
Canadian figures represent average US figures medians

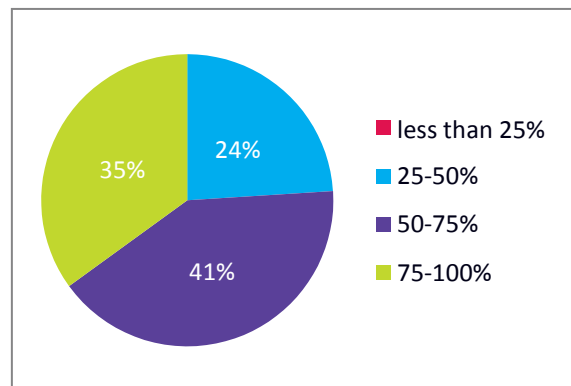
2.2 EXPERIENCE OF CANADIAN UNIVERSITY ART GALLERIES

In 2012 the University and College Galleries Association of Canada (UCGAC) conducted a survey of its 41 members. Responses were received by 29, or about 71% of the total, and serve to provide benchmarks for the Anna Leonowens Gallery of NSCAD, recognizing that some galleries show professional works as well. Among key findings, including some comparisons to the 2005 UCGAC survey, are the following points. A table comparing some of the key results from the 2012 and 2005 surveys follows:

- **Facilities:** The size of the exhibition space at the 29 respondent university art galleries ranged from 1,300 sf to 7,800 sf, with the median at 3,500 sf. The Anna Leonowens Gallery is currently 2,930 sf. Like NSCAD, 44% of respondents have multiple display sites with the second NSCAD site the long and narrow 1,780 sq. ft. Loggia Gallery at the Port, which is not to be relocated.
- **Artist Accommodations:** Some 25% of respondents, including NSCAD, offer accommodations or residences for visiting artists.

- **Permanent Collections:** Almost all (97%) of respondents have collections care responsibilities and 83% are actively collecting. Some 72% said that collections acquisitions are the responsibility of an Acquisitions Committee as opposed to the Director. About 66% have Category A status, down from 74% in the previous survey. NSCAD does not offer Class A space in its current facilities. Three of the respondents have a moratorium on collecting due to inadequate staff or space.
- **Exhibitions:** All the respondents, including NSCAD, display contemporary art, 10% show only contemporary art while the large majority display primarily contemporary art and some historical pieces from their collections.
- **Attendance and Markets:** Attendance estimates ranged from 3,680 visitors to a reported 100,000 annual visitors. It is not known which Gallery reported this figure. NSCAD reported about 15,700 free admission visitors in 2015, primarily from within the university community, which is the norm. Some 83% of Leonowens Gallery visitors are from within Metro Halifax.
- **Governance Relationship with Universities:** Some 83% of respondents report that they benefit from university Advisory Committees that are supportive not directive. Most universities help with fundraising to supplement the largely university funded operating budgets.
- **Staffing:** The largest full-time staff complement was 10 with the smallest at one while the median is three. NSCAD reports two. With all staff including students the range was 4 to 60, with a median of 10 compared to 7 in 2005.
- **Operating Budgets and Extent of University Support:** The range was \$100,000 to \$1,150,000, with the median at \$470,000. NSCAD reports an operating budget for its galleries of about \$157,000. Operating budgets increased in all but one case since 2005. University support to meet operating cost requirements represented the majority of funding for 76% of the university galleries. For 35% of university galleries, university funding accounted for 75% or more of the operating budget as shown in the following chart:

- less than 25% - 0%,
- 25-50% -24%,
- 50-75% - 41%
- 75-100% - 35%, which is lower than the 48% reported in 2005.



The data indicate an increased level of revenue to support university galleries from fundraising, grant writing, trusts or an endowment. Some 66% report having an endowment. About 60% of the galleries do fundraising through university development offices or as joint ventures. With respect to earned income, 39% have some level of retail sales as a revenue generator, 50% have a donation box and 32% report income from the rental of spaces during evening hours.

| University and College Galleries Association of Canada Surveys, 2012 and 2005 | | |
|--|--|--|
| Issue | 2012 Survey | 2005 Survey |
| Sample Size | 29 | 27 |
| Gallery Status | 66% have Category A designation | 74% have Category A designation |
| Median Size - Total Space | 827 sm (8,900 sf) | 525 sm (5,675 sf) |
| Median Size - Exhibition Space | 325 sm (3,500 sf) | N/A |
| Reporting Relationship | Over half report to Vice Presidents, others mostly to Deans | 50% report to President or Vice President (mostly VP Academic), |
| Advisory Boards/Committees | 83% | Majority, including both university and wider regional communities |
| Autonomy | Regardless of governance all reported full autonomy in artistic direction | Regardless of governance all reported full autonomy in artistic direction |
| Cross-Staffing with University | 48% teach, 21% have option to teach for additional pay but do not have time to do so | One-third of Directors or Curators have cross appointments and 50% teach. Teaching accounts for only 5-10% of time |
| Staffing Levels | Median full-time staff of 3 | Median full-time staff of 2 |
| In-Kind Staffing Support | Most universities provide in-kind assistance | 94% reported in-kind staffing assistance from University |
| Staffing Costs as % of Total | Staff costs still over half of total costs | Salaries and benefits over 50% of costs |
| Staff Workload | Substantial workload, including administrative and fund-raising | 70% report working an average of 50 to 75 hours per week |
| Education Level of Director | 94% held graduate degrees | 80% held graduate degree, 23% doctorate |
| Median Annual Compensation for Director | \$87,000 | \$73,000 |
| Average Annual Attendance | Range from 3,680 to 100,000, based almost entirely on free admission | Close to 13,900, primarily based almost entirely on free admission |
| Median Operating Budget (excludes in-kind) | \$470,000 | \$300,000 |
| Sources of Operating Funds | 35% reported 75% to 100% from parent university | 48% reported 75% to 100% from parent university |

Source: University and College Art Galleries Association of Canada, Survey Report on University Galleries, 2006 and 2013

2.3 EXPERIENCE OF SELECTED PUBLIC ART GALLERY AND ART SCHOOL CO-LOCATIONS

The proposed AGNS/NSCAD co-location is a ground-breaking concept, a new paradigm. No examples were identified that offer close comparability to an art museum/gallery and an art school to be co-located but to remain organizationally separate, which is assumed for the AGNS/NSCAD co-location. Four comparables are discussed and summarized below. Two of the four are physically now connected and the others were integrated when founded in the 19th century. The extent of the shared spaces and operations is summarized below with detailed data set out in Appendix A to this report. The four selected are as follows:

Art Institute of Chicago (AIC) and School of the Art Institute of Chicago (SAIC):

There was originally one integrated facility but both the museum and the school grew too large so they separated but are in connected buildings. Both are under the same Board governance. Shared spaces include a large auditorium with an agreed allocation of time between them, as well as shared loading dock and mechanical equipment. ***The school uses AIC event spaces for graduation ceremonies and galas. Centralized shared staff including human resources, accounting, IT, legal and CFO and some crossover of AIC curators who teach art history at the School.***

Boston Museum of Fine Arts and Tufts School of Boston Museum of Fine Arts:

There was a single governance until 2015 when the School became part of Tufts University and became administered by it. However, the School facility is still owned by the Museum. The Museum and school buildings are separate and across street from each other so there are no shared spaces. Operationally, Museum staff still lecture at the School and international artists work with School faculty and staff. ***As part of agreement with the University, Fine Arts School students/faculty still have free admission access to Museum exhibitions and to collections for research purposes and discounts for concerts, films and special events.***

Pennsylvania Academy of Fine Arts and Museum of PAFA, Philadelphia: Originally both occupied a single building but as both grew there was a need for a second adjacent building. The School and Museum share the same governance and some School and Museum functions are in both buildings. ***Centralized staff include marketing, development, finance, human resources, and security. There is some but not substantial crossover of curatorial and teaching staff.***

Rhode Island School of Design and RISD Art Museum, Providence: The School and Museum are both under the same governance. Although the Museum is part of the School it is nonetheless seen by the general public as the Rhode Island State Art Museum. The Museum used to be in five of the 61 buildings in the centre of campus and the extent of the sharing was a shared lecture hall and central power plant. ***The development of the Chace Center Museum building in 2008 with a downtown-facing entrance included a shared auditorium, 6,000 sf special exhibitions gallery, student gallery, classrooms, conservation lab, and both museum and school storage of works on paper. There is also centralized human resources, accounting, facilities management, but little crossover between teaching staff and curators.***

All of those interviewed believed it was a very good concept (“no brainer”) for an AGNS/NSCAD co-location for synergies and capital and operating cost savings.

2.4 ANALYSIS OF OTHER WATERFRONT MUSEUMS

It is useful to understand the market and operation of existing museums along the Halifax waterfront and the attendance benefits achieved by the waterfront locations. These include the Maritime Museum of the Atlantic and the Canadian Museum of Immigration at Pier 21. This will also provide benchmarks and lessons for the planning of the co-located AGNS/NSCAD. Also opening near the waterfront by the end of 2017 is the Discovery Centre, a hands-on science centre.

2.4.1 MARITIME MUSEUM OF THE ATLANTIC

The existing Maritime Museum of the Atlantic is in a building of about 55,000 sq. ft., of which 30,300 sq. ft. is exhibition space that features permanent exhibits on the Titanic, the 1917 Halifax Explosion, the CSS Acadia, shipwreck treasures, days of sail, age of steam, a recreated hardware and fish supplies store, convoy and other exhibits. The Museum is part of the Nova Scotia Museum system, and in fact is seen to be a revenue centre to support operation of less popular museums in the system. Attendance in 2016 was about 174,600, up from 155,900 and 148,900 the previous two years. Cruise ship visitors accounted for about 21% of visitors in 2016, but that figure has been as high as 35% of total annual visitors in the past, largely because of the Titanic exhibition. In the year of the Titanic movie the museum drew 244,000 visitors. Maritime history is also seen to be representative of Nova Scotia to cruise ship tourists who tend to seek experiences that are unique to the destinations they are visiting. Other high attendance years have been when Tall Ships visited. ***The challenge for the Art Gallery of Nova Scotia will be to be perceived as offering opportunities that are distinct from what is offered by art galleries/museums in communities from the cities and towns in which tourists and cruise passengers originate.***

About 53% of MMA visitors are American or international tourists, with 34% as tourists from outside Nova Scotia, and only 9% from within Metro Halifax and 5% from elsewhere in the province. Closer proximity to the Maritime Museum would therefore be very positive for the AGNS and the Anna Leonowens galleries from the perspective of widening potential attendance among tourist markets.

Relatively few school groups attend the Maritime Museum (3,044 in 2015, or 2% of total visitors). The low percentage is partly because of success in attracting non-school visitors. The peak grades for school field trips at the Maritime Museum are from grades 2-6, which is somewhat younger than grades which attend the existing AGNS.

About 85% of all MMA visitors arrive from May through October. This is despite the fact that admission charges are lowered during the other months of the year, as seen in the following table. The data reflect the reality that the bulk of the visitors during the warmer weather months are tourists, including cruise ship passengers.

Admission Prices 2015 - 16

| | May 1 - Oct 31 | Nov 1 - April 30 |
|---|----------------|------------------|
| Adult | \$9.55 | \$5.15 |
| Senior 65 + | \$8.50 | \$4.40 |
| Youth 6 – 17 y/o | \$5.15 | \$3.10 |
| Child 5 y/o and under | Free | Free |
| Family/Youth under 17 y/o + 2 adults | \$24.75 | \$11.85 |

Operating hours are also extended during the warm weather months, increasing to seven days from six during the other months (closed Mondays), adding a half hour per day until 5:30 p.m. and opening at 9:30 a.m. on Sundays, compared to the 1 p.m. for the rest of the year. Free admission is offered on Tuesday evenings until 8 p.m. and special programming is offered during this period. (The idea of offering free admission when the museum is most popular and charging admission when it is less popular is questionable from a market/financial perspective.)

The total operating budget for the Maritime Museum is in the range of \$1.47 million, plus the value of the centralized services the Museum benefits from as a consequence of being part of the Nova Scotia Museum. Admissions and other earned income account for 77% of revenue, with the remainder from provincial centralized services. This is far higher than average earned income among museums in Canada. Rentals income is limited to about \$52,000 per year, based largely on rental of the Small Craft Gallery.

2.4.2 THE CANADIAN MUSEUM OF IMMIGRATION AT PIER 21

The Canadian Museum of Immigration at Pier 21 became the second national museum outside the National Capital Region in February of 2011. As a consequence, it has received \$22 million in federal funds to expand facilities from the previous 50,000 to 80,000 sq. ft., and to re-do its exhibits. The federal government has allocated \$7.7 million per year in operating support for a 5-year period at which time the level of funding support will be reviewed. The Pier 21 operating budget used to be \$2 million and is now about \$10.2 million per year, excluding amortization. The Museum pays \$1.6 million in rent to the Port Authority for the 100,000 sq. ft. space plus \$200,000 per year in lieu of municipal taxes.

As a consequence of a larger operating budget and new facilities for rentals attendance levels increased substantially from the 45,000 visitor level to 130,000 of which 60,000 is paid attendance and 40,000 attending rentals opportunities and 30,000 free admissions. Cruise visitors have very easy access to Pier 21 and account for 5,000 of the paid admissions but represent 40% of retail sales. Pier 21 has volunteer greeters that meet cruise passengers when they depart the ships. School groups pay admission and account for 5,000 of the 40,000 paid admissions.

Noteworthy is that one in five Canadians has a direct connection to Pier 21. The existing market is primarily tourists, at 84% mainly from Ontario with 16% from within Nova Scotia. The cost of parking is modest at \$5.00 per full day during the week and free on weekends and evenings after 6 p.m. The Port receives the parking revenues.

Admissions are based on an adult admission charge of \$10.00 that was increased in January 2017 to \$14.50 (including HST). The senior rate (60+) is now \$11.25 with a youth rate (6-17) rate of \$9.25. These higher rates are likely to be acceptable to many tourists but may result in lower attendance among residents. A family rate is available at \$34.50 and includes two adults and up to three children. An annual Pier Pass is available for adults at \$38.00 and \$90.00 for families, which offers unlimited free admission and discounts on retail, programs and other opportunities.

Pier 21 had an operating budget of about \$10.2 million (excluding amortization) in 2016, of which \$7.7 million (75%) was from the federal government. Earned income totaled about \$1.4 million (14%) with the remaining \$1.1 million (11%) from donations and investments. Earned income includes \$408,000 from admissions. ***There is a very substantial \$500,000 from a combination of hall rentals and special events, reflecting large facilities with great water views. This includes 20 lucrative weddings and about 300 other events. Of the three spaces used for rentals, Heritage Hall is the largest and has a seating capacity of 250 and 500 for receptions. It is a waterfront location that should also substantially increase rentals revenue for AGNS.*** Other earned revenues are \$306,000 from retail sales and \$160,000 from the family history centre and various programming opportunities including a genealogy service.

Noteworthy is that Pier 21 has an exclusive caterer who must operate the Gateway Café, which would otherwise not be viable.

Staffing costs represent 53% of operating expenses but this percentage would be higher if Pier 21 did not pay rent (\$1.6 million) and also payment to the City in lieu of taxes at about \$200,000. Pier 21 had a staff of 22 before National Museum designation. It now has a staff in the 35 range. There are also about 100 volunteers.

3. MARKET AND OPERATIONS ANALYSES

Understanding the markets for and operations of the existing Art Gallery of Nova Scotia (AGNS) and the Nova Scotia College of Art and Design (NSCAD) University, including the market for the Anna Leonowens Gallery, is an important foundation for considering the opportunities and constraints of a co-location. This chapter also updates the data regarding potential resident, school and tourist markets for Halifax and the implications to the co-location.

3.1 EXISTING MARKETS FOR AND OPERATION OF THE CO-LOCATING INSTITUTIONS

3.1.1 ART GALLERY OF NOVA SCOTIA

The Art Gallery of Nova Scotia is already in a mixed-use building, located below government offices. It occupies 67,222 gross sq. ft., much of which is poorly laid out and inefficient space. The total exhibition space is only 19,532 net square feet (nsf) of which about 5,610 nsf is allocated to temporary exhibitions. There is a gift shop of 627 nsf and a separately operated café of 1,470 nsf. Other key existing spaces that affect the market for and operation of the existing AGNS include an 80-seat auditorium and seminar rooms.

The AGNS opens daily from May to October and closes on Mondays from November through mid-May. Hours were recently shortened from 10 a.m. to 5 p.m. to 11 to 4 p.m. with the exception of Thursdays during which the museum remains open to 9 p.m. when free admission is offered. However, a new better located facility will allow longer hours to be reintroduced.

Admission charges are \$12 for adults with discounts in other categories. Total annual attendance has averaged about 37,000 in recent years. Free admission currently is offered to elementary and secondary level school groups, which helped to double the school group percentage to about 16% from when it was charged several years ago. Free admission is also offered to students and faculty of NSCAD, children six and under, those attending during free admission Thursday evenings and Nocturne, which is one evening/night per year modelled after Nuit Blanche in Toronto which attracts 3,000 to 5,000 persons. Among non-school visitors about 40% attend for free. A better located and higher quality new AGNS co-located with NSCAD should help to increase both paid and free admissions.

The AGNS reports that about 55% of all visitors are female and that the market skews older, both of which are common. **Co-location with NSCAD will increase the number of younger people who attend.** Average length of stay for school groups is about 90 minutes and ranges from 45-60 minutes for most other visitors. Repeat visitation levels are relatively low at 30% and about 65% of visits take place on weekdays, reflecting the impact of the free school and Thursday evening attendance.

The AGNS has a current membership of 2,390 who account for about 10% of all visitors, but this figure includes free membership to all NSCAD students and all artists in the permanent exhibition. Excluding them there are about 1,200 memberships.

The AGNS currently has a full-time staff of 33, supported by 3.2 FTE part-time staff, 78 regular and 120 periodic volunteers. Its operating budget is in the range of \$3.6 million, of which about 52% is from the provincial government. Recommendations or assumptions and implications associated with the co-location are set out in the following chapters while financial aspects of the existing AGNS are considered in the Chapter 5 attendance and financial projections.

3.1.2 NSCAD UNIVERSITY

For 130 years, NSCAD has been teaching critical inquiry and creative thinking, bringing together education and research to connect practical skills with innovative thinking. NSCAD believes that the visual arts can play an even greater role in fostering innovation for Canada as we seek to create jobs and transition to an innovation-based creative economy in the long term.

NSCAD is a degree granting university with an enrollment of about 675 students, about 25% of whom are from the Halifax Regional Municipality, 25% from elsewhere in Nova Scotia and 50% from other provinces and international. **Enrollment levels are likely to be increased not only as a consequence of the co-location with AGNS but also because of an increased emphasis on recruitment, cutting edge technology and other program offerings, with estimates of a growth in enrollment to 850. This is particularly important to NSCAD because 45% of its operating funds are based on enrollment.**

The co-location expands efforts at creative capital clustering that have demonstrably revitalized the surrounding area of NSCAD's Fountain Campus with the introduction of the Cabaret Voltaire Atlantique and Art Bar + Projects programmed by the Anna Leonowens Gallery. The campus also includes various tenants including the Atlantic Film Festival. The co-location also builds archival infrastructure for the Library/Learning Commons and Anna Leonowens Gallery and knowledge mobilization apparatus through the NSCAD Press, contributing directly to Canadian heritage preservation and promotion.

NSCAD University has a unique mission and mandate in Atlantic Canada. The proposed campus on the shared site will house five of NSCAD's nine research clusters, each with its own research purpose: Library, Learning Commons and Digital Archives; CineFlux, including Immersive Black Box, Electronics Lab, Animation Lab; Institute of Contemporary Craft; Art Education Collaboratory and Art and Reconciliation Project; the Drawing Lab; and NSCAD Press.

Together, these research clusters will contribute to a lively university arts, craft and design research culture that encourages research collaboration and engagement with industry/post-secondary/non-for-profit partners, fosters ideation and innovation, supports arts, craft and design research and archival activity through the library/learning commons, promotes channels of reconciliation and understanding through research into arts-based/hand-based practices, and cultivates a public awareness/network of arts-based research through events/workshops.

NSCAD students have long received free admission to the AGNS, studied the collections and archives to inform their learning and have opportunities for internships and experiential learning. Works created by students and alumni and from the collection are shown in the free admission Anna Leonowens Gallery, which was established in 1968. The Gallery occupies three separate though linked spaces and is open from 11 a.m. to 5 p.m. from Tuesday through Friday and on Monday evenings when there is a show opening. Saturday hours are from noon to 4 p.m. There are generally more than 90 student exhibitions held each year. NSCAD students and faculty, friends and relatives account for 98% of the 12,000 annual visitors to the Anna Leonowens Gallery⁴, with school groups accounting for the remainder. ***The co-location with AGNS will serve to expose many more people to the Anna Leonowens Gallery, assuming it is visible and easily accessible to AGNS visitors.*** NSCAD has its own permanent art collection, some of which is already stored at the AGNS, and an archive. And there will be opportunities in the co-located facility for student works to be sold in the AGNS retail store.

NSCAD currently offers extensive summer camp programming for 5-18 year olds attracting over 350 participants. There is an opportunity for collaboration with the AGNS for mutual benefit. The Anna Leonowens Gallery and the Port Campus Loggia Gallery operates with a full-time staff of two, supported by student interns. The Port Campus is leased space with 33 years of a 40-year lease remaining. The total operating budget for the NSCAD galleries is about \$157,000, of which about 92% is allocated to staffing costs.

⁴ The Loggia Gallery on the Port Campus attracts a few thousand visitors as well and will remain in its current location after the co-location takes place.

3.2 POTENTIAL MARKETS

This section considers potential resident, school and tourist markets for Halifax and the waterfront Salter Block site, in particular. Since the AGNS is far more focused on attracting visitors than is the Anna Leonowens Gallery of NSCAD and the public programs offered by NSCAD, the analysis has a greater applicability to AGNS.

3.2.1 POTENTIAL RESIDENT MARKETS

The resident market is important to all museums and related institutions for the following main reasons:

- The resident market is readily accessible and available on a year-round basis.
- Residents can be made aware of the exhibitions and programs of the AGNS and the Anna Leonowens Gallery more easily and cost-effectively than may tourists.
- Residents are most likely to be repeat visitors.
- Residents are more likely to become volunteers, members and donors.
- Residents often advise, and accompany, visiting friends and relatives to area attractions.

The only 2016 census data that has been released is for population levels. This is reflected below. Other demographic and socioeconomic data are from the 2011 census.

3.2.1.1 Population Size and Projections

The following table offers an overview of population totals and growth trends for the Halifax Regional Municipality (HRM) compared to provincial and national figures. The data from the 2016 Census show a population growth for the HRM that substantially exceeds the provincial average but is lower than the Canadian average. Although substantial, relative to larger Metropolitan Areas in some of the other provinces ***the data indicate a limited resident population base and thus the importance of tourist market segments that should be far more likely to attend on the Salter Block site.***

| Resident Population | | | | | |
|-------------------------------|------------|------------|------------|------------|--------------------|
| | 2001 | 2006 | 2011 | 2016 | % Change 2006-2016 |
| Halifax Regional Municipality | 359,111 | 372,679 | 390,096 | 403,390 | 8.2% |
| Nova Scotia | 908,007 | 913,462 | 921,727 | 923,598 | 1.1% |
| Canada | 30,007,094 | 31,612,897 | 33,476,688 | 35,151,728 | 11.2% |

Source: Statistics Canada, 2016 Census and <http://www.statcan.gc.ca/tables-tableaux/sum-som/l01/cst01/demo05a-eng.htm>

Noteworthy is that there are about 800 residential units being developed in the downtown area, many of which are two and three bedroom units that will provide more of a built-in market, with the likelihood of additional residential development. The Halifax Partnership, for example, sees a trend to more conversions of offices to residential in the downtown area. This is positive for museum/gallery visits.

3.2.1.2 Age

The market for art galleries generally skews older, and most have difficulty attracting children. This is also seen from the experience of the existing AGNS in which only 5% of non-school visitors are under age 18, with 11% of AGNS visitors aged 18-24. Although NSCAD students and faculty already receive free admission, the opportunity for an AGNS/NSCAD co-location should help to increase attendance levels among youth. Appeal to younger children should also increase with the assumed implementation of a children’s hands-on gallery.

Of note as well is the general aging of the population over the next 20 years as more baby boomers become seniors, live longer and are more active than previous generations. This is positive for the AGNS.

| Age of Population, 2011 | HRM | | Nova Scotia | | Canada | |
|----------------------------|---------|-----|-------------|-----|------------|-----|
| | # | % | # | % | # | % |
| 0-9 years | 39,120 | 10% | 88,410 | 10% | 3,686,990 | 11% |
| 10-19 years | 44,355 | 11% | 107,250 | 12% | 4,098,490 | 12% |
| 20-29 years | 59,630 | 15% | 111,540 | 12% | 4,357,040 | 13% |
| 30-39 years | 52,415 | 13% | 107,925 | 12% | 4,336,835 | 13% |
| 40-49 years | 60,910 | 16% | 138,390 | 15% | 5,000,005 | 15% |
| 50-59 years | 58,740 | 15% | 148,425 | 16% | 4,999,600 | 15% |
| 60-69 years | 40,680 | 10% | 115,345 | 13% | 3,574,385 | 11% |
| 70-79 years | 20,965 | 5% | 64,050 | 7% | 2,075,765 | 6% |
| 80 years and older | 13,270 | 3% | 40,400 | 4% | 1,347,585 | 4% |
| Median Age | 39.9 | | 43.7 | | 40.6 | |
| | 390,085 | | 921,735 | | 33,476,695 | |

3.2.1.3 Education and Income

Level of education is the variable with the closest correlation to cultural attendance and participation, as supported by numerous studies. The higher the level of education of the individual the more likely it will be that this person will attend or participate. Like education, household income is an important indicator of potential cultural attendance, but is not as significant an indicator as education. That is, high education, low-income persons are more likely to attend than are persons of high income and low education.

As seen on the first table below, educational attainment levels are substantially higher in the Halifax Regional Municipality than either the provincial or national average. This is a positive indicator for the AGNS. Median family income levels in the HRM are somewhat higher than the national average and substantially higher than the provincial average. Positive as well is that the percentage growth between 2006 and 2011 in the HRM exceeded the national average. However, **interviews indicated a substantial degree of price consciousness that will need to be taken into account in establishing appropriate admission charges for the new AGNS.**

| Educational Attainment | HRM | Nova Scotia | Canada |
|--|-------------|--------------------|---------------|
| Less than high school | 13% | 20% | 17% |
| High school | 21% | 21% | 23% |
| Trade certificate | 11% | 13% | 12% |
| College diploma or some university | 26% | 25% | 24% |
| University diploma or degree | 30% | 21% | 23% |
| Total | 100% | 100% | 100% |
| <i>Source: Statistics Canada, National Household Survey 2011, total population 25+</i> | | | |

| Income | HRM | Nova Scotia | Canada |
|--|------------|--------------------|---------------|
| Median Family Income- all census families, 2011 | \$ 78,690 | \$ 66,030 | \$ 72,240 |
| Median Family Income- all census families, 2006 | \$ 54,129 | \$ 46,605 | \$ 53,634 |
| Percentage Change | 45% | 42% | 35% |
| <i>Source: Statistics Canada: 2011 Census</i> | | | |

3.2.1.4 Gender

Women account for a slightly larger percentage of the population but are generally a more important market for culture than men are for the following main reasons:

- Women tend to make the decisions in a household regarding educational experiences for their children. Therefore, the greater the perceived educational benefits of cultural opportunities the more likely they will be selected;
- Women account for a large majority of teachers who usually make the decisions regarding school field trip destinations;
- Women tend to make the decisions regarding attractions to visit while on family vacations and account for a large majority of bus tour passengers and trip planners.

About 55% of non-school visitors to the AGNS are women, which is within a common 55-60% female range for art museums.

3.2.1.5 Ethnicity

Compared to other urban centres Halifax has a relatively low percentage of visible minorities. The following table indicates that in 2011 about 9% of HRM were visible minorities compared to 19% for Canada as a whole and 5% for Nova Scotia. Where Halifax exceeds the national average on a percentage basis is with the black (African Canadian) and Arab communities. Although ethnicity is not a major consideration in the planning of the co-located AGNS/NSCAD facility, both institutions are conscious of a provincial focus on First Nations and welcoming recent immigrants.

| Visible Minorities | Halifax (CMA) | | Nova Scotia | | Canada | |
|--|---------------|------------|---------------|------------|------------------|-------------|
| | Count | % | Count | % | Count | % |
| Total population in private households | 384,540 | 100 | 906,175 | 100 | 32,852,320 | 100 |
| Total visible minority population | 35,040 | 9.1 | 47,270 | 5.2 | 6,264,750 | 19.1 |
| South Asian | 3,995 | 1.0 | 4,960 | 0.5 | 1,567,400 | 4.8 |
| Chinese | 4,620 | 1.2 | 6,050 | 0.7 | 1,324,750 | 4.0 |
| Black | 13,780 | 3.6 | 20,790 | 2.3 | 945,665 | 2.9 |
| Filipino | 1,320 | 0.3 | 1,890 | 0.2 | 619,310 | 1.9 |
| Latin American | 1,025 | 0.3 | 1,360 | 0.2 | 381,280 | 1.2 |
| Arab | 5,520 | 1.4 | 6,290 | 0.7 | 380,620 | 1.2 |
| Southeast Asian | 895 | 0.2 | 1,160 | 0.1 | 312,080 | 0.9 |
| West Asian | 1,205 | 0.3 | 1,365 | 0.2 | 206,840 | 0.6 |
| Korean | 845 | 0.2 | 955 | 0.1 | 161,125 | 0.5 |
| Japanese | 290 | 0.1 | 445 | 0.0 | 87,265 | 0.3 |
| Visible minority, n.i.e. | 445 | 0.1 | 720 | 0.1 | 106,475 | 0.3 |
| Multiple visible minorities | 1,090 | 0.3 | 1,285 | 0.1 | 171,935 | 0.5 |
| Not a visible minority | 349,500 | 90.9 | 858,905 | 94.8 | 26,587,575 | 80.9 |

3.2.2 SCHOOL/UNIVERSITY MARKETS

It is important for the AGNS and NSCAD to offer programming of particular interest to the school market for the following main reasons:

- Education is part of the mandate of all museums and galleries. There needs to be opportunities to broaden and deepen participation from this important market;
- Children brought to museum-related institutions as part of school field trips often convince their parents to take them again.
- For children in lower income/education families attending on a field trip is often the only opportunity to attend.

Whereas school groups often represent 15% to 25% of total attendance for the science and historical museum types, they generally account for 5-10% of attendance at art museums/galleries. This has also been the case for the AGNS whereas NSCAD reports that school groups account for about 2% of its visitors. This should increase in a co-located facility and therefore expose more students to future enrollment opportunities at NSCAD.

The key determinants for schools to attend on field trips are the size of the student population within a convenient distance, relationship to curriculum, student enjoyment, proximity and cost.

3.2.2.1 Enrolment Levels and Projections

The Art Gallery of Nova Scotia will seek to attract more students from throughout the province, and occasionally from elsewhere, but given the reality of transportation times and cost the vast majority of field trips are likely to be from within the Halifax Regional School Board. The Board includes 13 districts and 137 schools.

As seen on the following table, enrolment levels have declined over the past decade from 57,477 students in 2001/02 to 48,173 in 2014/15. Projections indicate a further enrollment decline in the short term which is cause for concern with respect to attracting school markets in general. However, the ***bigger issue, as discussed below, is a decline in field trips and also substantial competition among museum and other cultural institutions, particularly when preferences tend to be for science related field trip opportunities. This is because science museums are often believed to help result in better academic achievement, offer more interactivity, and because they are preferred by many parents who wish to encourage their children to pursue careers in the sciences. An advantage to AGNS of co-location with NSCAD is its integration of interdisciplinary programs such as animation and gaming.***

| Halifax Regional School Board Enrolment | |
|--|-----------|
| Year | Enrolment |
| 2001 | 57,477 |
| 2002 | 56,895 |
| 2003 | 56,528 |
| 2004 | 55,711 |
| 2005 | 54,215 |
| 2006 | 52,728 |
| 2007 | 52,173 |
| 2008 | 51,863 |
| 2009 | 50,983 |
| 2010 | 50,079 |
| 2011 | 49,531 |
| 2012 | 48,909 |
| 2013 | 48,565 |
| 2014 | 48,173 |

Source: HRSB, 2015

3.2.2.2 Curriculum Links

Interviews conducted with educators as part of the previous study indicate the visual arts are part of the curriculum in the following grade levels and for the duration indicated:

- Elementary to Grade 6 for 60 minutes per week:
 - Productive - Making of art
 - Reflective - Looking at art images
 - Historical – Understanding historical context
- Grades 7-9 for 60 minutes per week, currently an elective. However, one arts subject (art, drama, dance, music) is soon to be compulsory every other day.
- Grades 10-12: One arts subject is required to graduate.

There should also be other opportunities for wider art-science curriculum links associated with the better coordination that a co-location between AGNS and NSCAD would facilitate.

3.2.2.3 Interactivity and Student Enjoyment

Field trips have often been selected according to the extent to which they provide hands-on or interactive participation. With continuing cutbacks in the funds available to schools, there is likely to be an even greater emphasis on selecting field trip destinations that are learning-based and age-appropriate in relation to both content and activities, but also “fun” and interactive, thus offering students higher levels of learning enjoyment. This is rooted in the knowledge that children are more likely to learn if their experience is interesting, engaging and enjoyable. Assumptions for the new AGNS set out in Chapter 4 include a more substantial level of interactivity than has been possible in existing facilities, including painting, clay and print-making studios to be grouped together with an exterior and an interior entrance to allow for evening use by adults as well. More use of technology and a computer-equipped children’s gallery is recommended and assumed for AGNS while exposure to technology-focused art programming at NSCAD is also very positive.

It is commonly found that word of mouth among teachers is an important factor in field trip selection. Teachers are looking for staff and docents who are not only knowledgeable about the subject matter but who have the ability to communicate well and connect with the students. Increasingly important as well is positive social media feedback as well as perceptions held by some teachers that one may view art and understand historical context on line, without the need to physically visit a Gallery. The making of art in high quality studio space is of particular importance and a motivator to get teachers to view the “real thing” in the AGNS and to be exposed to the Anna Leonowens Gallery of NSCAD and the maker spaces on its Port Campus. Ideas heard in previous interviews include the printmaking experience, folk art based on wood, carving into Styrofoam, and opportunities to combine dance associated with folk art, as well as a focus on how technology has changed art to allow for a multi-disciplinary science-art focus.

3.2.2.4 Field Trip Policies and Cost

Field trips must meet curriculum guidelines and overcome concerns about cost of transportation, admission charges and even a requirement for costs associated with police background checks on parents wishing to chaperone the children on field trips. A local bus costs about \$300 per day, but within the day there is a limited window of opportunity of when the buses are available, often between 9:30 a.m. and 1:30 p.m.

3.2.2.5 University Markets

In addition to NSCAD University there are five other degree-granting institutions in Halifax. With a combined enrollment of over 35,000, including 6,000 international students, there is an opportunity for the AGNS and NSCAD’s Anna Leonowens Gallery and other programming offered by NSCAD to widen appeal to university students.

3.2.3 TOURIST MARKETS

The relatively low Canadian dollar has its greatest impact on keeping Canadians at home and has a small positive impact on American visitation. TripAdvisor ranks the Art Gallery of Nova Scotia as number 17 in things to do in Halifax. Highest is the Halifax Public Gardens, followed by the Central Library, Waterfront Boardwalk, the Citadel, Point Pleasant Park, the Maritime Museum and Pier 21. There should be opportunities for the co-location to increase the ranking for the AGNS.

This section considers input from key informants and relevant studies regarding potential tourist markets for the Halifax Regional Municipality and cultural tourists in general, including potential implications to the planning of the co-located AGNS and NSCAD on the Salter Block.

3.2.3.1 Tourism to Nova Scotia and the Halifax Regional Municipality

The following key data are from Nova Scotia Key Tourism Indicators, research compiled for Destination Halifax and from the interview process:

- **Size, Origin and Primary Motivation of the Tourism Market for Halifax:** Available data indicate that the Halifax area attracts close to three million tourists per year, of whom about 80-85% are leisure travelers. It is leisure travelers, including those visiting friends and relatives, who, unlike business travelers, have the time and inclination to attend art galleries and take part in other cultural opportunities. Close to 90% of tourists to Halifax have been domestic, of whom about three quarters are from elsewhere in Nova Scotia, with about 5% each from the United States and other international locations. Since the focus of the AGNS is Canadian art “with a Nova Scotian accent”, and it is the artistic heritage of Nova Scotia on display, it is logical for tourists from elsewhere in Nova Scotia and Atlantic Canada to be the most likely tourists to attend the new AGNS. In addition, there are opportunities for increased educational and cultural tourism, including more conferences, as a consequence of the AGNS/NSCAD co-location.
- **Growth of Visitation:** Visitation increased by 13% in 2016 over the previous year.
- **Origin of Visitors to Nova Scotia:** The following table compares data from 2006 to more recent data and indicates a substantial growth in visitors from Ontario and a decline in visitors from Atlantic Canada and the United States while international visitors have remained about the same. The most likely tourism markets to attend the AGNS and Anna Leonowens Gallery are from within Atlantic Canada not only because of the size of the markets but also given the more substantial galleries available in Ontario, Quebec and New England. However, the new waterfront location of the AGNS and Anna Leonowens galleries should help to increase attendance from among these other major markets.

| Origin of Visitors to Nova Scotia | 2015 | 2014 | 2013 | 2006 |
|--|-------------|-------------|-------------|-------------|
| Atlantic Canada | 51% | 51% | 54% | 55% |
| Quebec | 5% | 5% | 4% | 5% |
| Ontario | 24% | 23% | 23% | 19% |
| Western Canada | 7% | 8% | 7% | 6% |
| Total Canada | 87% | 87% | 88% | 85% |
| New England | 3% | 3% | 3% | 4% |
| Middle and South Atlantic | 3% | 3% | 3% | 4% |
| Central, Mountain & Pacific | 3% | 3% | 3% | 4% |
| Total US | 9% | 9% | 8% | 11% |
| International | 4% | 4% | 3% | 4% |
| Total Canada | 100% | 100% | 100% | 100% |
| Total Visitation | 2,069,200 | 1,958,900 | 1,893,100 | 2,115,400 |

Source: Nova Scotia Visits by Origin Survey, 2015-2006

- Point of Entry into Nova Scotia:** The following table indicates the point of entry of visitors to Nova Scotia. The primary entry point involving driving traffic from or passing through New Brunswick is Amherst while Halifax is the primary point of entry by air. Both reported increased volume in 2015 relative to the previous year.

| Point of Entry and Total Visitation | | | | | |
|--|-------------|-------------------|-------------|-------------------|-----------------|
| | 2015 | % of Total | 2014 | % of Total | % Change |
| Amherst | 1,222,000 | 59% | 1,126,000 | 57% | 9% |
| Halifax Stanfield International Airport | 631,000 | 30% | 645,000 | 33% | -2% |
| Caribou | 106,000 | 5% | 86,000 | 4% | 23% |
| North Sydney | 51,000 | 2% | 51,000 | 3% | 0% |
| Yarmouth | 23,000 | 1% | 23,000 | 1% | 0% |
| Digby | 37,000 | 2% | 28,000 | 1% | 31% |
| Total Visitors | 2,070,000 | 100% | 1,959,000 | 100% | |

Source Nova Scotia Key Tourism Indicators, 2016

- Length of Stay:** The average length of stay of leisure visitors usually exceeds the length of stay among business travelers, but that has not been the case in Halifax. The average length of stay among leisure visitors is 1.4 nights and is 1.9 nights for business travelers. This reflects a substantial number of day trip tourists to Halifax.

- **Cruise Market:** In 2015 there were about 222,000 cruise ship passengers on board ships that stopped in Halifax. This is a decline from the 261,000 in 2010. The peak months for cruise visits are September and October, accounting for over 70% of all passengers. About 65% of cruise passengers who exit the ships remain in the downtown area as opposed to going to Peggy's Cove, whale watching and other non-Halifax destinations. Many cruise ship passengers who take ship-booked excursions take buses, which include downtown tours. Others walk from the cruise port to the downtown along the waterfront walkway and waterfront streets. Cruise ship passengers are primarily from the Washington to Boston corridor. ***Interviews indicated that the AGNS will not be a preferred destination for cruise ship passengers unless it emphasizes unique opportunities, particularly Maud Lewis and regional folk art in general. Exclusivity will also be important, including behind the scenes tour opportunities.***
- **Convention/Rentals Market:** The implementation of the new Convention Centre, which is scheduled to open in December of 2017, will allow for an increase in capacity over the current 1,200 to about 4,000 delegates. Convention business is now turned away in Halifax because the existing convention centre has only one ballroom, so that while there may be the occasional convention of 4,000 in the future the primary objective is to have more than one smaller convention at the same time. Many conventions/conferences seek one off-site venue for a special function. The AGNS is seen to fit the demographics of convention delegates well because most are in the 45-65 age range that is peak for art galleries. About 40% of delegates arrive with spouses. ***There are opportunities for the co-location to increase convention delegate and spouse visits and to be a preferred off-site place for off-site functions.***

3.2.3.2 Cultural Tourism Market

Tourists most likely to attend the AGNS would be categorized as cultural tourists. A still relevant 2009 study by the US Cultural and Heritage Marketing Council reported that:

- 78% of adult US travelers attended a cultural activity or event while on a trip.
- 24% of those interviewed planned to take a trip whose primary purpose was to attend cultural or heritage destination. This suggest about one quarter of Americans may be categorized as a cultural tourism market.
- Cultural tourists are more likely to attend museums or galleries (54%) historic sites (66%), or an arts or crafts fair or festival (45%).
- Cultural tourists spend one-third more than non-cultural tourists
- Cultural tourists take 20% more trips than non-culture tourists

The data indicate the importance of cultural tourism and the role an expanded and relocated AGNS might play in enhancing the cultural tourism infrastructure of Halifax.

4. KEY ASSUMPTIONS UNDERLYING PROJECTIONS FOR CO-LOCATED AGNS/NSCAD

This chapter sets out a series of key approved recommendations/ assumptions and their rationale, which form the basis for the attendance, operating revenue and expense projections in Chapter 5 of this study.

4.1 PLANNING PRINCIPLES AND CORE ELEMENTS OF THE CO-LOCATION

The analyses in the previous chapters and the direction that emerged from the two vision/assumptions workshops help to lead to several key planning principles that help establish the core elements of the co-location. Some of these points are discussed in greater detail in subsequent sections of this chapter:

1. The separate missions and governance structures of AGNS as a provincial art gallery and NSCAD as a degree granting educational institution will continue and necessitate the need for all spaces to be separately owned. Doing so will simplify the capital fundraising to allow for each institution to collaborate but raise its own capital funds.
2. The essential concept of the co-location of the AGNS and NSCAD is one of horizontal integration in which the two facilities are side by side with some spaces owned by one and used by the other. Verticality is assumed to be within each separate institution.
3. Although all spaces will be separately owned the co-location will help to reduce the space requirements and therefore lower capital and operating costs for both institutions.
4. The galleries of the AGNS will remain primarily charged admission while the NSCAD galleries will continue to offer free admission.

5. It has been agreed that the two institutions will not pay to use the spaces of the other. Rather, based on a positive spirit of collaboration and assuming the trade-offs are of about equal value, the underlying concept is one of barter.
6. It is assumed that a Committee to include an equal number of representatives from AGNS and NSCAD, plus a designated person from within the Nova Scotia government, will address any disagreements that might arise both during construction and ongoing operations.

4.2 SALTER BLOCK SITE

The scope of this facility and feasibility study does not include a detailed site plan and architectural design for the co-located AGNS and NSCAD. At this point it is simply assumed that the site will be on the Salter Block.

7. Among the main strengths and weaknesses of the Salter Block site for the AGNS/NSCAD co-location are the following points:

Strengths:

- Some 2.5 million persons per year are reported to walk along the pedestrian waterfront boardwalk, largely in the warmer weather months, to be enhanced with additional cultural and engaging experiences.
- A central waterfront site offers proximity to downtown residences, offices, hotels, restaurants and retail stores as well as various festivals.
- There is substantial residential development being implemented nearby, thereby increasing the size of a built-in resident market within walking distance of the site.
- Waterfront views and access enhances opportunities for facility rentals, a very important revenue generator.
- There are no demolition costs associated with the Salter Block. An open site currently used for surface parking will help to limit capital cost requirements for the project.
- Of particular importance to NSCAD the site is close to the Port Campus, only a 6-10 minute walk.
- Proximity to the cruise terminal, Pier 21 and the Discovery Centre.
- Opportunities for open, public spaces to be programmed by AGNS, NSCAD and others.

Weaknesses:

- There is a high capital cost to develop underground parking on this site. This suggests the likelihood of high parking charges for visitors. The current assumption is for 540 underground parking spaces to replace about 1,000 surface spaces.

- Concerns about the rising ocean waters as a consequence of climate change will require higher capital costs but will allow for an increase in building heights of two metres.
8. It is assumed that **the AGNS/NSCAD co-location will be implemented on the Salter Block.**
 9. The Salter Block will be mixed use to include not only AGNS/NSCAD but also retail, restaurant and other commercial uses. However, **AGNS and NSCAD will both have substantial ground floor space.**
 10. **Building heights of four or five floors** will meet the Downtown Halifax Land Use By-Law and will not violate the City's view plane legislation.
 11. It is assumed that the building or buildings will be sited to adhere to Salter Block **right-of-way or easement restrictions** on which permanent structures may not be placed.
 12. **Capital and operating costs associated with parking**, whether underground or in a nearby garage, will not be the financial responsibility of AGNS or NSCAD.
 13. **Parking revenue** will accrue to the Waterfront Development Corporation. The WDC will also be responsible for ongoing maintenance costs associated with the parking.
 14. The site will offer good **access** for deliveries and school and tour buses.
 15. **Bus parking** opportunities will be found, whether on or off-site.
 16. There will be a **one-acre public open space** partially on each of the Salter and Foundation Blocks available for outdoor gathering and programming space that will benefit both AGNS and NSCAD.
 17. The Waterfront Development Corporation will be responsible for **maintenance of all spaces outside the buildings.**

4.3 OWNERSHIP

18. **It is assumed that the Province of Nova Scotia will own the AGNS facility while NSCAD will own its facility but not be required to pay for property acquisition.** The occupancy costs (utilities, repairs and maintenance, insurance and security/fire system) paid by the Province for the AGNS will continue to be applicable in the new facility while NSCAD will be responsible for paying occupancy costs for its spaces.
19. Although NSCAD University will own its building, the **province will need to approve any future sale or lease assignment.** The lease assignment is for the footprint of the building.

4.4 CAPITAL FUNDING

20. NSCAD expects to realize capital assets from the sale of the Fountain campus and the Academy campus. **Funds from these sales will be used to support the capital needs of the separate NSCAD facilities.**
21. It is assumed that in addition to obtaining **capital funds** from core supporters there will be coordinated but separate fundraising campaigns in alignment with a shared vision.

4.5 SPACES AND FACILITIES

The space program in this section is provided herein to show the spaces that a co-located AGNS and NSCAD would comprise of. It takes into consideration the sharing of spaces to minimize duplication of like functions currently held by both facilities, spaces and their minimum area requirements are provided to address synergies which will result from combining both facilities while balancing the needs of each, as well as the inclusion of functions that will make this new joint facility meet best art museum and art school practice.

The material that informed this space program includes:

- Submitted Facility, Market and Operations and Financial Data Request for existing Operation Questionnaire for AGNS and NSCAD.
- Site Tours of existing AGNS facilities and NSCAD campuses undertaken in November 2016
- Feedback during AGNS and NSCAD stakeholder and staff workshops of held in November 2016
- Background information received at the startup of this project, including the space program in the AGNS Operational Feasibility Study for New Site and Building Lord Report dated March 2012 and NSCAD University Space Study Report by Lydon Lynch Architects dated May 2016.
- Best practice art museum standards and art school requirements.

4.5.1 PROGRAM ZONE AND GROSSING FACTOR:

To best understand the capital cost implications of collecting institutions, it is best to divide the space list up into Zones. Zoning analysis is a valuable tool because cost per square feet varies for the different zones.

The zones are determined according to whether the space accommodates collections or not, and whether the space normally is open to the public, or not. The four zones are:

- Zone A: Public Areas - Public Non-Collection Zone

- Zone B: Exhibition and Collection Display - Public Collection Zone
- Zone C: Collection Care - Non-Public Collection Zone
- Zone D: Offices and Operations - Non-Public Non-Collection Zone

In the tables below, different colours are used to differentiate which zone spaces belong to AGNS and which are NSCAD spaces in the Space Program in Section 4.6.5. The four zones are:

| AGNS | Public | Non-Public |
|-----------------|---|---|
| Non-Collections | A. Public Areas (AGNS Public Non-Collections) | D. Offices and Operations (AGNS Non-Public Non Collections) |
| Collections | B. Exhibitions and Collection Display (AGNS Public Collections) | C. Collection Care (AGNS Non-Public Collections) |

| NSCAD | Public | Non-Public |
|-----------------|--|--|
| Non-Collections | A. Public Areas (NSCAD Public Education) | D. Offices and Operations (NSCAD Non-Public Non Collections) |
| Collections | B. Exhibition and Collection Display (NSCAD Gallery) | C. Collection Care (NSCAD Non-Public Collections) |

Zone A and Zone B will often have a higher (and more costly) level of architectural finish, typical of art museums, as these are spaces for public use only. Alternatively, Zone B and Zone C require climate control and security systems in keeping with the value and special requirements of collections and exhibitions. The NSCAD Gallery may not have as stringent requirements as those of AGNS which will want to have the capacity to welcome international exhibits, however if all galleries are placed in proximity to one another, which is desired, the mechanical systems will need to be designed to meet the most stringent requirements, those of the temporary gallery. Thus, although there may be operational saving by lowering environmental standards for some galleries, the initial costs estimates will be similar across the board for Zone B.

As a side note, it is assumed that to help control capital costs there will likely be one architectural team and one contractor for the entire AGNS and NSCAD complex.

4.5.2 THE FOUR ZONES

This section provides more detailed information regarding what is in each zone.

Zone A — Public Areas: This zone is typically the visitor’s first experience of the building. In this zone, visitors are present, but sensitive collections items are not. Zone A is among the most expensive to build, due to the high level of finish required, but it is less

expensive to operate, since it does not have as tight temperature and humidity requirements. Functional areas within this zone are:

- **Entry & Visitor Amenities:** Spaces that support the entry experience, such as lobbies, public restrooms, cloakrooms, and gift shop.
- **Event, Social & Public Program Spaces:** The museum's public programs, events and educational activities, and social spaces such as multi-purpose reception hall, theatre and cafe.
- **Instructional Spaces:** AGNS' Education Suite and spaces to support the delivery of the NSCAD's instructional mission.

Zone B —Exhibition and Collection Display: These are exhibition and collection display areas where visitors encounter works of art featured as part of exhibitions. This is the most costly part of the building (capital and operating), since it requires both high levels of finish to meet public expectations and environmental controls and security for collections. Functional areas within this zone are:

- **Permanent Galleries:** Galleries for the permanent collection
- **Temporary Galleries:** Exhibition spaces for changing exhibitions
- **Collection Study:** Includes visible storage for closer study of collections.

Zone C — Collection Care: Works of art are present in this zone, and access is typically restricted. All collections handling, management and support areas — from the collection shipping & /receiving area inward — are part of this zone. It is less expensive to build, as it only requires a basic level of finish, but it is more expensive to operate, since the space requires tight temperature and humidity controls and security needs to be to museum standards. Functional areas within this zone are:

- **Collection Storage:** Storage for works of art by medium
- **Collection/Exhibition Support:** Spaces that support the exhibition function of the museum.
- **Collection Care:** Conservation spaces that support collections.

Zone D — Offices and Operations: This includes areas that do not normally host the public or require specific environmental or security controls. Offices and work areas to support staff activities (Zone D1) and programs and building support are in this zone, as are storage and work areas (Zone D2). It is frequently the lowest-cost part of the building, since it requires neither a high level of environmental control and security nor the level of finish necessary to meet public expectations. Functional areas within this zone are:

- **Staff Offices & Amenities:** Areas for staff, student employees, and volunteers
- **Operations Workshops & Staff Areas:** Work spaces required to support the day- to-day operations of the museum and support spaces for NSCAD students and extended studies.

- Storage: Storage required to support the day- to- day operations of the museum.
- Building Support & Services: Areas such as custodial support rooms, garbage/recycling handling, and IT services equipment rooms.

4.5.3 NET VERSUS GROSS SQUARE FEET

Lord's approach to space planning is based on identifying the usable area known as the Total Net Floor Area, of space required to accommodate all the functions of a project. On this space program it is measured as imperial standards. Once the total Net Square Feet is established we apply a grossing factor to determine the overall Gross Floor Area of the facility.

Once we have established a list of Net Square Feet, we apply a grossing factor to take into account three factors:

- vertical and horizontal circulation space (stairwells, elevators, escalators) between net usable areas
- the thickness of walls between and around usable spaces
- mechanical and electrical equipment spaces.

All three of these factors can be determined precisely only when the architectural concept and the engineering specifications have been approved. For this reason these three components are projected at this stage of planning as a percentage increment or multiplier of the Net Square Feet usable space. This percentage increment or multiplier is called the Grossing Factor.

The grossing factor we recommend for planning purposes at this stage of an Integrated Nova Scotia Museum is 50% (a multiplier of 1.5). The following shows a generalized breakdown of what this gross square area represents within the total building package:

| FUNCTION | % OF BUILDING SPACE |
|---|---------------------|
| Wall thickness & Structural | 10% |
| Horizontal and Vertical Circulation: Corridors, Elevator Shafts & Fire Exits/Stairs | 20% |
| Mechanical Rooms/ Electrical & Mechanical Runs | 20% |
| PROJECTED SPACE: | |
| Grossing Factor: | 50% (1.5) |

4.5.4 NEW CO-LOCATED AGNS AND NSCAD SPACE PROGRAM HIGHLIGHTS

Although subject to modification in detailed design, the following are program features, assumptions and recommendations that are present in the co-located AGNS and NSCAD in the space program that is found in Section 4.6.5:

- The central lobby will be considered as AGNS space for evening rentals but made available to NSCAD for its own events.
- There will be a separate entrance to NSCAD to allow for 24-hour student and faculty access to NSCAD facilities.
- There will be only one café, to be located within AGNS. It is assumed that the operator will be the near exclusive caterer for events and that an area in that café kitchen will help support catering events.
- About 1,800 sq. ft. of retail space will be in AGNS space but NSCAD products will be for sale in approximately 540 sq. ft. of that space. The retail storage room as AGNS space will serve both AGNS and NSCAD.
- NSCAD spaces and programs to be relocated to the co-located facility include painting, printmaking, drawing, film, animation, art history, media arts, library and archives with jewelry, fashion, textiles and design moving to the Port because of the industrial and maker space focus of the Port campus.
- There are numerous studios and classrooms in NSCAD. Some not involving specialized equipment could be made available to the AGNS for its programming.
- Separate classroom spaces will be required for NSCAD to discourage the general public from walking into scheduled university classes.
- The AGNS research library will be within NSCAD's library space.
- A 200-seat auditorium that will be dividable in NSCAD common instructional space but made available to AGNS on a periodic basis, therefore the 2000 sq. ft. theatre in the AGNS Stand Alone is not required. In place a multi-function reception hall (4000 nsf) is provided, which can be used for various types of programming and can be divided up into two spaces when needed.
- In the co-located program, AGNS will have one space for artists in residence; NSCAD will also have one space for artists in residence at 500 nsf.

- With the co-location, the AGNS education suite has been reduced slightly from what it would be in separate facilities.
- The Maud Lewis Gallery was enlarged slightly to better accommodate the future better accessibility around the house.
- The Temporary exhibition space was reduced in both scenarios from the 2012 AGNS space list to a total net of 6000 sq. ft. which would accommodate the large majority of major shows. The Contemporary Art and First Nations and Inuit Art Galleries could be flexible spaces that can be used to accommodate periodic larger traveling exhibits.
- Anna Leonowens Gallery will be in NSCAD space off the lobby and very close to AGNS spaces so that it is a seamless experience for the visiting public. It would be enlarged to 2500 nsf.
- NSCAD collections will continue to be stored at the AGNS. In addition, NSCAD archives storage will also be stored by AGNS but staffed by NSCAD.
- It is assumed that the current off-site storage of the AGNS will be maintained in Dartmouth until such time as a new collection storage facility is established.
- Archives will be stored in the AGNS to ensure museum level security and environmental controls are met.
- The Collection loading bay and Art Freight Elevator will be available to and used primarily by AGNS.
- NSCAD's Design Print Services are assumed to also support AGNS' Design Graphic Studio needs, along with dirty workshop and related support suites as these areas do not need special environmental controls or security. Access from both the AGNS and NSCAD are required and some spaces are owned by one and used by the other. Most are assumed to be owned by NSCAD.
- Some shared building support and services spaces were enlarged to consider use by two facilities instead of one.

4.5.5 SUMMARY SPACE PROGRAM

Below is the detailed space program which provides the following comparables:

- **AGNS Stand Alone 2012:** from the AGNS Operational Feasibility Study for New Site and Building Lord Report dated March 2012.
- **Scenario 1:** AGNS as a stand-alone building. This assumes that NSCAD will not be co-located with AGNS and AGNS will be in an independent building. This is based on the space program in the AGNS Operational Feasibility Study for New Site and Building Lord Report dated March 2012, however minor spaces have been altered based on feedback during workshops held in November 2016.
- **Scenario 2:** AGNS and NSCAD are co-located in one building with separate wings. Determination of which back of house spaces are owned by one but used by the other institution is subject to modification, but assumptions for the purposes of this report are as set out on the following table. Separately owned AGNS areas are based on Scenario 1 and separately owned NSCAD spaces are based on the NSCAD University Space Study Report by Lydon Lynch Architects dated May 2016. Owned by one and used by the other spaces take into consideration duplicated spaces in both space programs. Some spaces have been updated based on new information gained during workshops held in November 2016 and additional spaces were added where they were deemed to be required. Check marks indicate spaces that may be accessible to both institutions regardless of the ownership of those spaces.

| AGNS | |
|-----------|--|
| A | Public Areas (AGNS Public, non-collection) |
| B | Exhibition and Collection Display (AGNS Public, collection) |
| C | Collection Care (AGNS Non-Public, collection) |
| D1 | Office (AGNS Non-Public, non-collection) |
| D2 | Operations (AGNS Non Public, non collection) |

| NSCAD | |
|-------|--|
| | Public Areas (NSCAD Public Education) |
| | Exhibition and Collection Display (NSCAD Gallery) |
| | Collection Care (NSCAD Non-Public Collection) |
| | Offices (NSCAD Non-Public, non-collection) |
| | Operations (NSCAD Non Public, non collection) |

| Zone A | Space Name | AGNS Stand Alone 2012(nsf) | AGNS Stand Alone 2017 (nsf) | AGNS Separately Owned (nsf) | Shared 50/50: Owned by AGNS (nsf) | Shared Access | Shared 50/50: Owned by NSCAD (nsf) | NSCAD Separately Owned (nsf) | Comments/Notes |
|--------|--|----------------------------|-----------------------------|-----------------------------|-----------------------------------|---------------|------------------------------------|------------------------------|--|
| A.1 | Entry,Visitor Amenities and Programming/Event Spaces | | | | | | | | |
| A.1.1 | Central Lobby | 2000 | 2000 | 2000 | | ✓ | | | A shared entrance to access AGNS and NSCAD. Entry, greeting and information are for visitors, admissions, membership services, audio-guide pick up/drop off, etc. Could be used for evening rentals but made available to NSCAD for its own events. |
| A.1.2 | NSCAD Entrance | | | | | ✓ | | 500 | A separate entrance to NSCAD to allow for 24-hour student and faculty access to NSCAD facilities. |
| A.1.3 | AGNS Café | 1250 | 1250 | 1250 | | ✓ | | | To be leased out in AGNS to private operator |
| A.1.4 | AGNS Retail Store | 1250 | 1400 | 1800 | | ✓ | | | Adjacent to café so book browsers enjoy both; works by NSCAD products/supplies on sale here as well in a small part of the space (approx. 540sf, not 1076 nsf noted in the NSCAD FSP) |
| A.1.5 | Art Sales and Rentals (Teichert Gallery) | | 1500 | 1500 | | | | | Space rented from AGNS |
| A.1.6 | Multi-purpose Reception Hall | 4000 | 4000 | 4000 | | ✓ | | | Themed reception hall that could hold up to 400 standing or 250 in banquet layout for special events/functions. Assumes facing water. Also used for programming. |
| A.1.7 | Theatre | 2000 | 2000 | 0 | | ✓ | | | Substituted by Multi-purpose Reception Hall in co-located facility. Theatre provided below in NSCAD Education Program as Common Instructional - Theatre that can also be used by AGNS. |
| A.1.8 | Public Cloakroom | 150 | 150 | 150 | | ✓ | | | Adjacent to Lobby |
| A.1.9 | Group Cloakroom | 150 | 150 | 150 | | ✓ | | | Adjacent to Lobby |
| A.1.9 | Group Check-in | 250 | 250 | 250 | | ✓ | | | Adjacent to Lobby |
| A.1.10 | Restrooms | 1400 | 1400 | 1400 | | ✓ | | | Preliminary areas; Includes gender neutral/family restrooms; some located by cafe; includes education restrooms. Ground floor restrooms can be shared. |
| A.1.11 | First Aid Room | | 100 | 100 | | ✓ | | | |
| A.2 | AGNS Education Suite | | | | | | | | |
| A.2.1 | Studios | 3,750 | 2,500 | 2,500 | | ✓ | | | Three studios from the AGNS 2012 Space Program were reduced to two studios during our Nov 2016 Workshop; complete with sinks and AV for presentations, each 1250sf; space for art-making activities such as painting, clay and print-making. Sized to accommodate groups of 30-40 in classroom formats. Interior and exterior access important to enable evening use and revenue generation. |
| A.2.2 | Resource Room | 250 | 250 | 0 | | ✓ | | | Assumes that Education Collection Storage will support the Education Suite so not required; additional space could be used in NSCAD Library. |
| A.2.3 | Seminar Rooms | 1000 | 1000 | 1000 | | ✓ | | | One room that can accommodate 50 persons be subdivided into two to accommodate 20-25 persons each. |
| A.2.4 | School Lunch Room | 600 | 600 | 600 | | ✓ | | | Available for weekend birthday parties; Backpack storage can be provided here as well. |
| A.2.5 | Early Childhood Education | 500 | 500 | 500 | | ✓ | | | |
| A.2.6 | Artist in Residence Studio | 1000 | 500 | 500 | | ✓ | | 500 | Both AGNS and NSCAD have artists in residence studios at 500sf , each independently owned, rather than 2 owned by AGNS |

| | | | | | | | | | | | |
|-------------------|--|--------------|--------------|--|--|---|--|--------------|---|----------|--------------|
| A.3 | NSCAD Education Program | | | | | | | | | | |
| A.3.1 | Drawing & Painting Scheduled Studio/lab | | | | | | | 4,700 | | | |
| A.3.2 | Drawing & Painting MFA Studio | | | | | | | 350 | | | |
| A.3.3 | Printmaking Scheduled Studio/lab | | | | | | | 3,600 | | | |
| A.3.4 | Printmaking MFA Studio | | | | | | | 175 | | | |
| A.3.5 | Film Studios A & B | | | | | | | 2,950 | | | |
| A.3.6 | Film Computer Lab Animation | | | | | | | 475 | | | |
| A.3.7 | Film Pre-production Space | | | | | | | 550 | | | |
| A.3.8 | Film Post-Production Space | | | | | | | 650 | | | |
| A.3.9 | Film Audio Booths | | | | | | | 125 | | | |
| A.3.10 | Film Audio Studio | | | | | | | 1,550 | | | |
| A.3.11 | Intermedia Studios (Intermediate, Advanced, Electronic) | | | | | | | 1,550 | | | |
| A.3.12 | Photography B&W dark rooms (Junior and Senior) | | | | | | | 1,500 | | | |
| A.3.13 | Photography Lighting Studio | | | | | | | 800 | | | |
| A.3.14 | Photography Studio Projects | | | | | | | 425 | | | |
| A.3.15 | Photography Project Introduction | | | | | | | 400 | | | |
| A.3.16 | Common Instructional - Classrooms (Classrooms and Crit Spaces) + lockers | | | | | ✓ | | 5,325 | Theatre was removed from this number(2000 + 750sft for wings and theatre storage). Classrooms can be used to meet green room needs when required. | | |
| A.3.17 | Common Instructional - Theatre | | | | | ✓ | | 2,000 | Assumes 200seat lecture theatre; dividable. Will be in a NSCAD space but made available to AGNS on periodic basis. | | |
| A.3.18 | (Computer Lab and Cluster) | | | | | ✓ | | 975 | | | |
| A.3.19 | Research and Creative Practice | | | | | ✓ | | 2,150 | | | |
| A.3.20 | Library (collections) | | | | | ✓ | | 1,075 | | | |
| A.3.21 | Library Learning Commons/ Study Space | | | | | ✓ | | 1,625 | | | |
| A.3.22 | Writing Centre (Computer Station/Tutors Office) | | | | | | | 350 | | | |
| A.4 | NSCAD Student Support Spaces | | | | | | | | | | |
| A.4.1 | Student Lounge Space | | | | | | | 1,075 | | | |
| A.4.2 | Student Restrooms | | | | | | | 1600 | Preliminary areas; Based on assumption of 825 FTE students in 2020; Includes gender neutral restrooms | | |
| Sub-totals | | 19550 | 17900 | | | | | 15900 | 0 | 0 | 36975 |
| Totals | | 19550 | 17900 | | | | | 52875 | | | |

| Zone B | Space Name | AGNS Stand Alone 2012(nsf) | AGNS Stand Alone 2017 (nsf) | AGNS Separately Owned (nsf) | Shared 50/50: Owned by AGNS (nsf) | Shared 50/50; Owned by NSCAD (nsf) | NSCAD Separately Owned (nsf) | Comments/Notes |
|-------------------|------------------------------|----------------------------|-----------------------------|-----------------------------|-----------------------------------|------------------------------------|------------------------------|---|
| B.1 | Permanent Galleries | | | | | | | |
| B.1.1 | Maud Lewis Gallery | 1500 | 2000 | 2000 | | | | Space enlarged from 2012 Space Program by 500nsf to allow better accessibility around house. |
| B.1.2 | Nova Scotia Folk Art Gallery | 1000 | 1000 | 1000 | | | | |
| B.1.3 | Canadian Art | 5000 | 5000 | 5000 | | | | |
| B.1.4 | Contemporary Art | 5000 | 5000 | 5000 | | | | Contiguous space to allow for flexibility to have larger and smaller temporary exhibitions, Canadian and contemporary art shows. Ideally in proximity to Temporary Gallery. |
| B.1.5 | First Nations and Inuit Art | 2500 | 2500 | 2500 | | ✓ | | |
| B.1.6 | New Media | 750 | 750 | 750 | | ✓ | | |
| B.2 | Temporary Galleries | | | | | | | |
| B.2.1 | Temporary Exhibitions | 9000 | 7500 | 7500 | | ✓ | | Canadian Art and Contemporary Art Galleries are flexible spaces that can also be used to accommodate larger traveling exhibits, therefore they should be in proximity to Temporary Gallery. |
| B.2.2 | NSCAD Galleries | | | | | ✓ | 2,500 | Anna Leonowens Gallery will be in NSCAD space off the lobby and very close to AGNS spaces so that it is a seamless experience for the visiting public. |
| B.3 | Collection Study | | | | | | | |
| B.3.1 | Children's/Education Gallery | 2000 | 2000 | 1500 | | ✓ | | Includes computer and related opportunities |
| B.3.2 | Visible Storage | 2000 | 2000 | 2000 | | ✓ | | assuming 2sf/object can about show 1000 objects |
| Sub-totals | | 28750 | 27750 | 27250 | 0 | 0 | 2500 | |
| Totals | | 28750 | 27750 | 29750 | | | | |

| Zone C | Space Name | AGNS Stand Alone 2012(nsf) | AGNS Stand Alone 2017 (nsf) | AGNS Separately Owned (nsf) | Shared 50/50: Owned by AGNS (nsf) | Shared 50/50: Owned by NSCAD (nsf) | NSCAD Separately Owned (nsf) | Comments/Notes |
|-------------------|---|----------------------------|-----------------------------|-----------------------------|-----------------------------------|------------------------------------|------------------------------|---|
| C.1 | Collection Storage by Medium* | | | | | | | |
| C.1.1 | Ceramics Storage | 250 | 250 | 250 | | | | Assumes off-site storage; climate controlled. |
| C.1.2 | Works on Paper Storage | 250 | 250 | 250 | | | | Assumes off-site storage; climate controlled. |
| C.1.3 | Painting Storage | 1500 | 1500 | 1500 | | | | Assumes off-site storage; climate controlled. |
| C.1.4 | Sculpture / Installation Storage | 2000 | 2000 | 2000 | | | | Assumes off-site storage; climate controlled. |
| C.1.5 | Textiles Storage | 250 | 250 | 250 | | | | Assumes off-site storage; climate controlled. |
| C.1.6 | NSCAD Archives Storage – climate controlled | | | | | ✓ | 550 | Climate controlled. NSCAD Archives Storage will be in AGNS Collection Storage ; in proximity to NSCAD Library |
| C.2 | Collection/Exhibition Support | | | | | | | Will also support NSCAD Curatorial and preparation space needs |
| C.2.1 | Covered Loading Dock | 1500 | 1500 | 1500 | ✓ | | | Needed for off-site storage shuttle & exhibitions |
| C.2.2 | Collections Shipping/Receiving | 800 | 800 | 800 | ✓ | | | Roll-up door from covered loading dock |
| C.2.3 | Crating / Uncrating Area | 800 | 800 | 800 | ✓ | | | Adjacent to Collections Shipping-Receiving |
| C.2.4 | Isolation Room | 100 | 100 | 100 | ✓ | | | Adjacent to Crating/Uncrating Area |
| C.2.5 | Crate Storage | 600 | 600 | 600 | ✓ | | | Adjacent to Crating/Uncrating Area |
| C.2.6 | Temporary Exhibition Storage | 1000 | 1000 | 1000 | ✓ | | | Adjacent to Crating/Uncrating Area |
| C.2.7 | Photo Studio | 750 | 750 | 750 | ✓ | | | Adjacent to Crating/Uncrating Area |
| C.2.8 | Clean Workshop | 600 | 600 | 600 | ✓ | | | Matts and frames fitted to works of art here |
| C.2.9 | Staging Area(s) | 750 | 750 | 750 | ✓ | | | Adjacent to galleries & freight elevator landings |
| C.2.10 | Art Freight Elevator | | | | ✓ | | | part of grossing but would be dedicated to the AGNS |
| C.3 | Collection Care | | | | | | | |
| C.3.1 | Conservation Supplies | 100 | 100 | 100 | | | | |
| C.3.2 | Chemical Supplies | 75 | 75 | 75 | | | | |
| C.3.3 | Conservation Lab | 1200 | 1200 | 1200 | | | | |
| C.3.4 | Conservation Material Storage | 100 | 100 | 100 | | | | |
| C.4 | Other | | | | | | | |
| C.4.1 | NSCAD Library | 1250 | 1250 | | ✓ | | 1250 | Access available to AGNS |
| Sub-totals | | 13875 | 13875 | 12625 | 0 | 0 | 1800 | |
| Totals | | 13875 | 13875 | 14425 | | | | |

*Presumes an off-site storage facility

| Zone D1 | Space Name | AGNS Stand Alone 2012(nsf) | AGNS Stand Alone 2017 (nsf) | AGNS Separately Owned (nsf) | Shared 50/50: Owned by AGNS (nsf) | Shared 50/50: Owned by NSCAD (nsf) | NSCAD Separately Owned (nsf) | Comments/Notes |
|--------------|--|----------------------------|-----------------------------|-----------------------------|-----------------------------------|------------------------------------|------------------------------|---|
| D1.1 | AGNS Admin | | | | | | | |
| D1.1.1 | Administration Offices | 1000 | 1000 | 1000 | | | | |
| D1.1.2 | Curatorial Offices | 1475 | 1475 | 1475 | | | | |
| D1.1.3 | Development Offices | 675 | 675 | 675 | | | | |
| D1.2 | AGNS Admin Office Support Spaces | | | | | | | |
| D1.2.1 | Support Spaces | 500 | 500 | 500 | ✓ | | | Printing, fax, supplies etc. |
| D1.2.2 | Volunteer Spaces | 150 | 150 | 150 | ✓ | | | |
| D1.2.3 | Board Room | 550 | 550 | 550 | ✓ | | | |
| D1.2.4 | Meeting Rooms | 700 | 700 | 350 | ✓ | | | Only one 350 nsf, meeting room will be provided assuming that classrooms or other meeting rooms in NSCAD can be used. |
| D1.2.5 | Staff Lounge and Kitchenette | | 275 | 275 | ✓ | | | |
| D1.2.6 | Staff Lockers | | 50 | 50 | ✓ | | | |
| D1.2.7 | Staff Showers | 400 | 0 | 0 | ✓ | | | |
| D1.2.8 | Staff Restrooms | | 75 | 75 | ✓ | | | Preliminary areas. |
| D1.3 | NSCAD Admin Office Spaces | | | | | | | |
| D1.3.1 | Admin - Academic Affairs and Research | | | | | | 400 | includes 2 private offices; 4 workstations. |
| D1.3.2 | Admin - Admissions | | | | | | 1450 | Includes 1 private office; 2 workstations; 30% office support allowance |
| D1.3.3 | Admin - Finance & Administration | | | | | | 650 | includes 4 private offices and 4 workstations |
| D1.3.4 | Admin - Office of the President/Governance | | | | | | 500 | includes 2 private offices, 1 workstation |
| D1.3.5 | Admin - Student and Academic Services | | | | | | 800 | includes 5 private offices; 2 workstations |
| D1.3.6 | Admin - University Relations | | | | | | 325 | includes 2 private offices; 2 workstations |
| D1.3.7 | Admin - Extended Studies | | | | ✓ | | 700 | 5 offices and office support spaces; storage space allowance |
| D1.4 | NSCAD Admin Support Spaces | | | | | | | |
| D1.4.1 | Meeting/Boardroom | | | | ✓ | | 400 | Part of Office of the President/Governance. Meeting/boardroom for 20 persons |
| D1.4.2 | Admin - Service Center | | | | ✓ | | 1150 | copy service centre; 3 workstations for sessional staff; interview room; allowance for mtg/print/copy space |
| D1.4.3 | NSCAD Staff Lounge and Kitchenette | | | | ✓ | | 200 | |
| D1.4.4 | Staff Lockers | | | | ✓ | | 75 | |
| D1.4.5 | NSCAD Staff Restrooms | | | | ✓ | | 75 | Preliminary areas. |
| D1.5 | NSCAD Education Related Office Spaces | | | | | | | |
| D1.5.1 | Fine Art Offices - Chair | | | | | | 125 | |
| D1.5.2 | Fine Art Offices - F/T - Private Office | | | | | | 850 | |
| D1.5.3 | Fine Art Offices - Shared Workstations & Storage | | | | | | 525 | |
| D1.5.4 | Fine Art Offices - Office Work Storage Allowance | | | | | | 450 | |
| D1.5.5 | Media Arts - Chair | | | | | | 125 | |
| D1.5.6 | Media Arts - F/T - Private Office | | | | | | 975 | |
| D1.5.7 | Media Arts - Shared Workstations & Storage | | | | | | 575 | |
| D1.5.8 | Media Arts - Office Work Storage Allowance | | | | | | 575 | |
| D1.5.9 | H & CS - Chair | | | | | | 125 | |
| D1.5.10 | H & CS - F/T - Private Office | | | | | | 750 | |
| D1.5.11 | H & CS - Shared Workstations & Storage | | | | | | 200 | |
| D1.5.12 | H & CS - Office Work Storage Allowance | | | | | | 325 | |
| D1.5.13 | Grad Studies - Admin Staff - Private Offices | | | | | | 100 | |
| D1.5.14 | Grad Studies - Admin Staff - Work stations | | | | | | 100 | |
| D1.5.15 | Shared Academic Office Space | | | | ✓ | | 250 | |
| Sub-total D1 | | 5450 | 5450 | 5100 | 0 | 0 | 12775 | |
| Total D1 | | 5450 | 5450 | 17875 | | | | |

| Zone D2 | Space Name | AGNS Stand Alone 2012(nsf) | AGNS Stand Alone 2017(nsf) | AGNS Separately Owned (nsf) | Shared 50/50: Owned by AGNS (nsf) | Shared 50/50: Owned by NSCAD (nsf) | NSCAD Separately Owned (nsf) | Comments/Notes |
|---------|---|----------------------------|----------------------------|-----------------------------|-----------------------------------|------------------------------------|------------------------------|---|
| D2.1 | AGNS Collection Support | | | | | | | |
| D2.1.1 | Moving Equipment Storage | 300 | 300 | 300 | ✓ | | | Adjacent to Collection Loading Dock |
| D2.1.2 | Packing Supplies | 300 | 150 | 150 | ✓ | | | Adjacent to Collection Crating/Uncrating |
| D2.1.3 | Lighting Workroom | 150 | 150 | 150 | ✓ | | | |
| D2.2 | AGNS Education Support | | | | | | | |
| D2.2.1 | Education Program Storage | 125 | 125 | 125 | ✓ | | | Adjacent to AGNS Education Suite |
| D2.3 | AGNS Event Support | | | | | | | |
| D2.3.1 | Lobby Storage | | 100 | 100 | ✓ | | | Stanchions, signage, wheelchair storage etc. |
| D2.3.2 | Exhibit Furniture Storage | 500 | 500 | 500 | ✓ | | | Showcases, plinths, panels; adjacent to galleries |
| D2.3.3 | Table and Chairs Storage | 500 | 500 | 500 | ✓ | | | Adjacent to Event Spaces such as Lobby and Multipurpose Room |
| D2.4 | Retail & Food Services Support Spaces | | | | | | | |
| D2.4.1 | Retail Storage | 350 | 350 | 350 | ✓ | | | |
| D2.4.2 | AGNS Café Warming Kitchen | 500 | 500 | 500 | ✓ | | | Assumed that preferred caterer will run café therefore no separate catering kitchen required but plating area needed. |
| D2.4.3 | AGNS Kitchen - Food Storage | 100 | 100 | 100 | ✓ | | | |
| D2.5 | NSCAD Education Program Lab Support Spaces | | | | | | | |
| D2.5.1 | Theatre Stage and Wings | 500 | 500 | | ✓ | | 500 | |
| D2.5.2 | Theatre Storage | 150 | 150 | | ✓ | | 150 | Piano storage or other |
| D2.5.3 | Theatre Technical Booth | 150 | 100 | | ✓ | | 100 | Sound and projection facilities |
| D2.5.4 | Drawing & Painting Model Change Room | | | | ✓ | | 100 | |
| D2.5.5 | Drawing & Painting Props and Materials Storage | | | | ✓ | | 200 | |
| D2.5.6 | Drawing & Painting Storage Student Work | | | | ✓ | | 550 | |
| D2.5.7 | Drawing & Painting Resource Centre/Technicians Workroom | | | | ✓ | | 125 | |
| D2.5.8 | Printmaking Platemaking, acid room, etc. | | | | ✓ | | 725 | |
| D2.5.9 | Printmaking Resource Centre/Technicians Workroom | | | | ✓ | | 125 | |
| D2.5.10 | Film Equipment Cage/Storage | | | | ✓ | | 325 | |
| D2.5.11 | Intermedia Storage Allowance | | | | ✓ | | 75 | |
| D2.5.12 | Intermedia Resource Room/ Technicians Workroom | | | | ✓ | | 150 | |
| D2.5.13 | Photography Digital Studio/Computer Lab | | | | ✓ | | 650 | |
| D2.5.14 | Photography Film Processing Lab | | | | ✓ | | 550 | |
| D2.5.15 | Photography Print Finishing | | | | ✓ | | 650 | |
| D2.5.16 | Photography Equipment Cage | | | | ✓ | | 225 | |
| D2.5.17 | Photography Storage Allowance - 5% | | | | ✓ | | 275 | |
| D2.5.18 | Photography Resource Room/ Technicians Workroom | | | | ✓ | | 150 | |

| | | | |
|---------------------|--|-------------|-------------|
| D2.6 | AGNS and NSCAD Support | | |
| D2.6.1 | NSCAD Gallery Office/admin space | | |
| D2.6.2 | FUNSCAD Office | | |
| D2.6.3 | NSCAD Press (office and Support space) | | |
| D2.6.4 | Library Technical Support | | |
| D2.6.5 | Design Print Services | 150 | 150 |
| D2.6.6 | Multimedia Equipment Cage/Storage | | |
| D2.6.7 | Multimedia Services -office and workstations | | |
| D2.6.8 | Dirty Workshop | 750 | 750 |
| D2.6.9 | Paint Shop | 350 | 350 |
| D2.6.10 | Flammables Storage | 50 | 50 |
| D2.6.11 | Supplies and Tool Room | 150 | 150 |
| D2.7 | Building Support & Service Spaces | | |
| D2.7.1 | Operations Offices | 425 | 425 |
| D2.7.2 | Custodial Rooms | 100 | 100 |
| D2.7.3 | Custodial/Maintenance Storage | 50 | 50 |
| D2.7.4 | AV Workroom / Studio | 200 | 200 |
| D2.7.5 | IT Server Room | 200 | 200 |
| D2.7.6 | IT Equipment Storage | 100 | 100 |
| D2.7.7 | Computer Services | | |
| D2.7.8 | Security Booth | 150 | 150 |
| D2.7.9 | Security Lockers and Storage | 150 | 150 |
| D2.7.10 | Non-Art Shipping / Receiving | 150 | 150 |
| D2.7.11 | Garbage and Recycling Bins | 150 | 150 |
| D2.7.12 | Staff and Service Entry | | 100 |
| Sub-total D2 | | 6750 | 6750 |
| Totals D2 | | 6750 | 6750 |

| | | |
|---------------------------------------|---------------|---------------|
| D 1 and 2 Sub-totals | 12200 | 12200 |
| D 1 and 2 Totals | 12200 | 12200 |
| TOTAL AND GROSS FLOOR AREAS | | |
| Net Floor Area Sub-Totals | 74375 | 71875 |
| Grossing Factor: x 1.5* | 37188 | 35938 |
| Total Area Gross Sq. Ft. | 111563 | 107813 |
| Grand Total Area Gross Sq. Ft. | 111563 | 107813 |

| | | | | | |
|-------------|-------------|---|--------------|-------------|--|
| | | ✓ | | 275 | |
| | | | | 125 | |
| | | ✓ | | 400 | |
| | | ✓ | | 650 | |
| | | ✓ | 2300 | | Also includes AGNS Design Graphics Studio |
| | | ✓ | | 225 | |
| | | ✓ | 350 | | |
| | 750 | ✓ | | | Carpentry; frames made here includes Bulk material storage |
| | 350 | ✓ | | | |
| | 50 | ✓ | | | |
| | 150 | ✓ | | | |
| | | | | | |
| | | ✓ | 500 | | Shared and larger as assumed some spaces may be unique to each entity; includes offices and workstations |
| 100 | | ✓ | | 100 | |
| 50 | | ✓ | | 50 | |
| | 200 | ✓ | | | |
| 200 | | ✓ | | 200 | IT provided to AGNS by Province, NSCAD to have separate |
| 100 | | ✓ | | 100 | |
| | 300 | ✓ | | 450 | |
| | 150 | ✓ | | | |
| | 150 | ✓ | | | Adjacent to Security Booth |
| | | ✓ | | 200 | |
| | | ✓ | | 200 | |
| 100 | | ✓ | | 100 | |
| 3625 | 2300 | | 3275 | 8075 | |
| | | | 17275 | | |

| | | | |
|--------------|-------------|-------------|--------------|
| 66300 | 2300 | 3275 | 62125 |
| 33150 | 1150 | 1638 | 31063 |
| | | | |
| | | 201000 | |

4.5.6 SPACE PROGRAM ANALYSIS AND SUMMARY

This section evaluates the net and gross floor areas provided above in the Total and Gross Floor Areas above as follows:

- AGNS Stand Alone 2012 is 74,375 nsf.
- Scenario 1: With an objective to reduce space somewhat and therefore capital and operating cost requirements, AGNS Stand Alone 2017 is approximately 71,875 nsf, close to 4% smaller than the 2012 version.
- Scenario 2: The AGNS Separately Owned space is about 66,300 nsf is about 8% smaller in net floor area than Scenario 1: AGNS Stand Alone 2017 version. NSCAD Separately Owned component is approximately 62,125 nsf which is approximately 47,725 nsf smaller than the current Fountain and Academy campuses (approx. 109,850 nsf) or approx. 43% smaller. This is also taking into consideration that some of the spaces from the Fountain and Academy campuses are going into the reorganized Port Campus. There is approximately 5,575 nsf of space that will be owned by one and used by the other institution, bringing the total net area to about 134,000 nsf. With a grossing of 1.5 the gross floor area of the co-located facility is approximately 201,000 gsf, and thus smaller than if the AGNS and NSCAD were completely separate and not co-located.

4.6 ENHANCED VISITOR EXPERIENCE

Although the AGNS has not yet developed a new artistic vision or plan some recommended or assumed items are as follows.

22. ***An increased variety of art classes and workshops will be available for all age and skill levels*** for both AGNS and NSCAD. Flexible art studio/classroom space will accommodate classes and workshops in a range of artistic disciplines. Studio space in either or both facilities will be able to accommodate easels, live models for drawing classes, printing equipment, oil painting, photography, digital art, animation, video art and media.
23. ***A Committee will be established of AGNS and NSCAD representatives to identify specific programming opportunities*** that could be developed for the benefit of both institutions and the community at large. This will address issues of avoiding unnecessary competition by allocating which types of programs at which times should be offered by each institution or whether or not joint programming with revenue-sharing is possible.
24. We recommend that the Maud Lewis House in AGNS be enhanced with technology to better animate it for visitors to be part of an increased ***emphasis on folk art*** at AGNS. This could include talks with Conservators to offer the “exclusivity” that cruise ship and other tourist visitors are seeking and help to emphasize the unique opportunities offered by the AGNS when tourists are seeking unique experiences that reflect the essence of Halifax.

25. There will be visible storage opportunities both on and off-site with opportunities to see people working on a periodic basis. This will not only enhance the visitor experience it will be a revenue generator as the opportunity will need to be guided and may be extra charged as **“behind the scenes” tour opportunities**.
26. Rather than making incremental changes in its permanent collection galleries gradually over the year, the **AGNS will undertake a re-hang every three years** and market it as an important new temporary exhibition. Each re-hang should be thematic, not chronological, and each should draw different aspects of the collection out of storage. For example, one year it could be works of art about the environment, the next year it's the image of women, and so on.
27. **The AGNS and NSCAD will introduce a ‘Bad Weather’ strategy.** Most museums and galleries find that attendance increases during inclement weather but do not seek to develop strategic approaches to encourage even more visitors to attend. We recommend offering and marketing special public programming during non-winter inclement weather days. And the Gallery will shift staff responsibilities to gallery talks and other programming and encourage volunteers to come in during bad weather, knowing there is likely to be a larger audience for them to interact with.
28. **New technologies will be introduced:** This will help to widen access and use by younger people to include, for example, a series of podcasts about exhibitions, selected art works, or the permanent collection that may be downloaded from iTunes or the institution's website.
29. **A weekday afternoon strategy to target seniors and bus tours will be introduced.** A weekday afternoon strategy recognizes that weekend days are peak periods for family visits, while weekday mornings are when school groups attend. Weekday afternoons are commonly slower attendance periods. The market segments for which weekday afternoons are particularly convenient are seniors and bus tours, which are often comprised primarily of seniors, but include more women than men. Emphasizing weekday afternoons as quieter times will need to be marketed.

4.7 STAFFING

The Art Gallery of Nova Scotia is currently authorized to have 36.2 full time equivalents (FTE). The NSCAD galleries are staffed by 2 full time equivalent (FTE) staff and further supported by students. The full NSCAD staff is 128 FTE personnel.

If the two institutions were to be co-located, a higher level of staff collaboration could benefit both institutions, allowing for greater efficiency of services. However, it must be emphasized that the governance of the two institutions will remain separate and distinct, and so the extent of potential staff reductions and sharing is limited. We estimate that, with co-location, NSCAD would not reduce any FTE positions and AGNS could see a potential reduction of 2.4 FTE as compared to a fully independent AGNS and NSCAD. But in reality, it is likely there will be redeployment of staff as opposed to reductions.

In preparing the staffing plan for this report the following main assumptions were made:

- It has been assumed that NSCAD and AGNS will retain separate governance.

- Both institutions are working at a base level of staffing. A redeployment of staff has been assumed as opposed to layoffs as a consequence of the co-location of the two institutions.
- It is assumed that the Province of Nova Scotia will continue to provide security and janitorial staff services in the new facility and that NSCAD will require its own security and janitorial staff. Currently NSCAD outsources security and janitorial services. It has been assumed this will continue.
- NSCAD has a strong technical staff from which AGNS could benefit through collaboration.
- Both institutions will keep separate Development staff.
- Volunteers will supplement and not replace existing staff.

4.7.1 AGNS STAFFING

The table below shows AGNS' current staffing as well as recommended/assumed staffing for both a stand-alone AGNS and an assumed co-location with NSCAD. Regarding current staffing, the first column indicates the staff level that is authorized but there are currently unfilled positions as reflected in the second column that are to be filled based on a reorganization effective in April 2017. To accommodate for larger facilities and to reach operating efficiency staff numbers have been increased from the currently authorized 36.2 FTE to 48.7 FTE assuming a stand-alone AGNS or 46.3 FTE assuming the co-location with NSCAD.

| Art Gallery of Nova Scotia: Assumed Staffing Plan: Current, Independent and Co-Located | | | | | | |
|--|--|---------------------------|------------------------------|-----------------------------------|----------------------------------|---|
| A. Administration | | | | | | |
| B. Curatorial | | | | | | |
| C. Development | | | | | | |
| D. Marketing | | | | | | |
| | | Current Authorized (2017) | Current Reorg. April 1, 2017 | Future Independent (New Building) | Future Co-Located (New Building) | Notes |
| A. ADMINISTRATION | | | | | | |
| Director/CEO | | 1.0 | 1.0 | 1.0 | 1.0 | |
| Executive Assistant | | 1.0 | 0.0 | 1.0 | 1.0 | |
| Receptionist (Secretary) | | 1.0 | 1.0 | 0.0 | 1.0 | |
| CFO | | 1.0 | 1.0 | 1.0 | 1.0 | |
| Senior Accounting Clerk | | 1.0 | 1.0 | 1.0 | 1.0 | |
| Operations/Visitors Services Manager | | 0.0 | 0.0 | 1.0 | 1.0 | |
| Building Engineer | | 0.0 | 0.0 | 0.0 | 1.0 | Co-located assumed 50% shared with NSCAD Director Facilities Management |
| Head of Security | | 1.0 | 1.0 | 0.0 | 1.0 | Co-located assumed 50% shared with NSCAD Facilities Manager |
| Security | | 6.8 | 6.8 | 1.5 | 1.8 | Assumed 50% shared with NSCAD |
| Visitor Services/Interpretive Staff | | 2.0 | 2.0 | 7.2 | 7.4 | |
| Contract Manager | | 0.0 | 0.0 | 1.0 | 1.0 | |
| Sub-total | | 14.8 | 13.8 | 14.7 | 18.2 | 16.3 |
| B. CURATORIAL | | | | | | |
| Chief Curator | | 1.0 | 1.0 | 1.0 | 1.0 | |
| AGNS Yarmouth Gallery Coordinator | | 1.0 | 1.0 | 1.0 | 1.0 | |
| AGNS Yarmouth Gallery Assistant (P/T) | | 1.0 | 0.5 | 0.5 | 0.5 | |
| Curatorial Secretary/bookings | | 1.0 | 1.0 | 0.0 | 1.0 | |
| Curator of Modern/Contemporary Art | | 1.0 | 1.0 | 1.0 | 1.0 | |
| Curator of Art (subject TBD) | | 0.0 | 0.0 | 0.0 | 1.0 | |
| Assistant Curator | | 0.0 | 0.0 | 1.0 | 1.0 | |
| Collections Manager and Registrar | | 1.0 | 1.0 | 1.0 | 1.0 | |
| Assistant Registrar | | 1.0 | 1.0 | 1.0 | 1.0 | |
| Manager of Programs and Engagement | | 1.0 | 1.0 | 1.0 | 1.0 | |
| School Programs Coordinator | | 1.0 | 1.0 | 1.0 | 1.0 | |
| Educator: Public Programs | | 0.0 | 0.0 | 0.0 | 1.0 | |
| Educator: Studio Programs | | 0.0 | 0.0 | 0.0 | 1.0 | Co-located assumed 50% shared with NSCAD Exhibitions Coordinator |
| Education Assistant | | 0.6 | 0.6 | 0.6 | 1.0 | |
| Museum Technicians | | 2.9 | 2.9 | 2.9 | 3.0 | |
| Conservator | | 1.0 | 0.0 | 1.0 | 1.0 | |
| Sub-total | | 13.5 | 12.0 | 13.0 | 17.5 | 17.0 |
| C. DEVELOPMENT | | | | | | |
| Director of Development | | 1.0 | 1.0 | 1.0 | 1.0 | |
| Development Coordinator (Sponsorship) | | 1.0 | 1.0 | 1.0 | 1.0 | |
| Development Coord (Members/Vol) | | 1.0 | 0.0 | 1.0 | 1.0 | |
| Development Coordinator (Grants) | | 0.0 | 0.0 | 0.5 | 1.0 | |
| Development Coord (Events/Rentals) | | 1.0 | 1.0 | 1.0 | 1.0 | |
| Sub-total | | 4.0 | 3.0 | 4.5 | 5.0 | 5.0 |
| D. MARKETING AND COMMUNICATIONS | | | | | | |
| Director of Marketing and Sales | | 1.0 | 1.0 | 1.0 | 1.0 | |
| Social Media/Web Coordinator (currently Marketing Officer) | | 0.0 | 0.0 | 0.0 | 1.0 | |
| Graphic Designer | | 1.0 | 1.0 | 1.0 | 1.0 | |
| Retail Manager | | 0.0 | 0.0 | 1.0 | 1.0 | |
| Gallery Shop Staff | | 1.9 | 1.5 | 1.0 | 2.0 | |
| Weekend Evening/Part-time Allocation | | 0.0 | 0.0 | 0.0 | 2.0 | |
| Sub-total | | 3.9 | 3.5 | 4.0 | 8.0 | 8.0 |
| TOTAL FTE POSITIONS | | 36.2 | 32.3 | 36.2 | 48.7 | 46.3 |

4.7.2 NSCAD STAFFING

Most NSCAD divisions would not be affected by the co-location and have therefore not been included in the following table that compares an independent and a co-located NSCAD staff. Among staff that could be affected by the co-location, only a slight reduction in FTE staff from 26.0 FTE to 25.4 FTE is estimated in the following table. However, just as there would be sharing of spaces there would also be a cross pollination of ideas of co-located staff.

| Assumed Staffing for NSCAD Independent and Co-Located | | | | |
|--|--|-------------|-------------|---|
| Administration | | | | |
| Curatorial | | | | |
| | | | | |
| | | | | |
| | | Independent | | |
| A. ADMINISTRATION | Position Name | (Current) | Co-Located | Notes |
| | President | 1.0 | 1.0 | |
| | Executive Assistant to the President | 1.0 | 1.0 | |
| | Executive Assistant, Governance | 1.0 | 1.0 | |
| | VP Finance and Administration | 1.0 | 1.0 | |
| | Executive Assistant to the VP Finance & Administration | 1.0 | 1.0 | |
| | Director of Human Resources | 1.0 | 1.0 | |
| | Controller | 1.0 | 1.0 | |
| | Compensation & Finance Manager | 1.0 | 1.0 | |
| | Accounts Payable Clerk | 1.0 | 1.0 | |
| | Coordinator, Student Accounts and Receivables | 1.0 | 1.0 | |
| | Finance Office Assistant | 1.0 | 1.0 | |
| | Director of Facilities Management | 1.0 | 0.5 | |
| | Facilities Manager | 1.0 | 0.5 | AGNS Building Engineer |
| | Coordinator of Facilities Services | 1.0 | 1.0 | Co-located assumed 50% shared with AGNS Head Security |
| | Maintenance Technician (Granville) | 1.0 | 1.0 | |
| | Carpenter/Cabinet Maker | 1.0 | 1.0 | |
| | Maintenance Technician (Port) | 1.0 | 1.0 | |
| | Security | 0.0 | 0.9 | |
| | Sub-total | 17.0 | 16.9 | Co-located assumed 50% shared with AGNS Security |
| | | | | |
| B. CURATORIAL | Position Name | | | |
| | Director, Anna Leonowens Gallery | 1.0 | 1.0 | |
| | Exhibitions Coordinator | 1.0 | 0.5 | |
| | Multimedia staff | 6.0 | 6.0 | Co-located assumed 50% shared with AGNS Educator: Studio Programs |
| | Technician | 1.0 | 1.0 | |
| | Sub-total | 9.0 | 8.5 | |
| | | | | |
| TOTAL FTE POSITIONS | | 26.0 | 25.4 | |

4.8 OPERATING SCHEDULE

30. At present the AGNS opens daily from May to October and closes on Mondays from November through April. Hours were recently reduced from 10 a.m. to 5 p.m. to 11 a.m. to 4 p.m. with the exception of Thursdays when the museum remains open to 9 p.m. **No changes are recommended/assumed to the regular operating schedule** with the exception of a return to 11 a.m. to 4 p.m. hours as it reflects fewer visitors during the colder weather months and allows time for closing to the public in advance of evening rentals. Opening Friday evenings will also be considered based on public demand but is not assumed for the purposes of this study.
31. As discussed in Chapter 2, art galleries/museums have greater challenges in attracting children and school groups. To help the AGNS attract larger numbers of school groups we recommend/ assume **a period of “exclusive school use” before 10 a.m. on open weekdays** during the school year.
32. A **studio education program, with flexible hours** including periodic all-night operation if found to be net revenue producing, will be introduced. The AGNS will book and schedule usage 24 hours on some days. On most days it would involve school groups during the day and paid usage by adults in evenings, weekends and early mornings.

4.9 ADMISSION CHARGES

In 2015 the AGNS generated \$94,386 in admission revenue. Based on about 37,000 total visitors that year this figure translates to an average of \$2.55 per visitor. In part this reflects attendance by members, rentals and programs visitors from whom admission is not collected as well as persons attending on free Thursday evenings and others who receive free admission. These include NSCAD students and faculty, museums with which the AGNS shares reciprocal agreements, tour operators and front line staff of local hotels. The \$94,386 in admissions revenue accounted for only 2.0% of the operating budget. However, free admission is not assumed because of the expectation it might set for the Nova Scotia Museums and the unfair competition it would create for other museums and galleries that must charge admission. Moreover, cruise ship and other tourists would expect to pay admission and represent an important revenue source.

Our recommendations/assumptions associated with admission charges are as follows:

33. The Salter Block site will lead to a substantially greater level of tourist exposure to the AGNS/NSCAD galleries. This leads to the issue whether there should be different admission charges for Nova Scotia residents relative to tourists, as occurs in some US cities and states, or to have a price difference by season as takes place at the existing waterfront Maritime Museum of the Atlantic. **Taking into account that attendance at art galleries is influenced primarily by the art on view and not the seasonality of tourism we recommend continuation of the current year-round admission policy with no price differentiation between residents and tourists.**
34. The Anna Leonowens Gallery of NSCAD will continue to be accessible to all visitors at free admission.

35. The interview process in 2012 and again in 2016 confirmed a perception that the AGNS is over-priced at \$12.00 for adults. However, given a better location and enhanced facilities it is assumed that the **adult admission charge will be at \$14.00.**
36. Most temporary exhibitions will be included with the price of admission. It is assumed there will be **one blockbuster level exhibition every two years for a period of three months or more that will be capable of surcharge over the basic admission charge.** For the purposes of these projections the average surcharge is estimated to be \$5.00. The first blockbuster exhibition is not assumed to be implemented until after the three years projected in this study.
37. We recommend the **re-definition of an adult for the purposes of admission charges to age 25-64.** This encourages youth to attend whether or not they are university students. NSCAD students will continue to receive free admission.
38. CAA/AAA members will continue to receive a discount on admissions. **Discounts** will also be offered in association with hotels, other museums and additional opportunities that emerge.
39. We recommend that **cruise ship passengers arriving as individuals receive the same discount as offered to organized tour groups.** It is unlikely the AGNS will become a significant formal excursion of most cruise ships but that those who walk along the waterfront boardwalk and attracted to the Titanic and other exhibits of the Maritime Museum of the Atlantic will be exposed to the AGNS and should be provided with a discount. This takes into account limited time on shore and will require simple signage that cruise ship passengers will receive a discount simply by showing the ship-issued cards they must have when exiting and returning to the ship.
40. The notoriety of the new Art Gallery of Nova Scotia should bring attention to the AGNS satellite in Yarmouth. It opened in 2004 and has reportedly had limited attendance. In order to encourage some AGNS visitors to attend the Yarmouth Gallery admission to the AGNS will include **free admission to Yarmouth** within a 30-day period by showing the AGNS ticket stub or other proof of purchase during the charged admission period Conversely, visitors to Yarmouth would receive a half-priced admission to the AGNS for a 30-day period
41. **Free Thursday evenings have already been eliminated. We recommend/assume that in the context of the new co-located facility there be Half-Priced Thursdays** thus avoiding a situation in which people wait for the free admission. This is partly because young people 18 -24 are required to pay the adult admission charge. Sponsorship should be sought for additional programming, such as live music and special lectures, to enhance the visitor experience during this period. A lower cost membership, as discussed below, is recommended/assumed for those seeking repeat visitation at a lower cost.
42. Admission will be described as a **“full day pass”** entitling visitors to leave to eat and shop then return, thus contributing to downtown revitalization and economic development.

43. **Assumed admission charges** for the AGNS (including HST) are as follows:

| Assumed Admissions for New AGNS | |
|--|---------|
| Category | Charge |
| Adult (25-64) | \$14.00 |
| Senior (65+) | \$12.00 |
| Youth (13-24) | \$11.00 |
| Child (0-12) | \$0.00 |
| School Group (self-guided, per person) | \$5.00 |
| Tour Group (per person) including individual cruise passengers | \$10.00 |
| Indirect Paid/ Other Unpaid | \$0.00 |

4.10 REVENUE CENTRES

4.10.1 RETAIL

44. There will be a single integrated retail store in space designated for the AGNS but this will include **some shelf space to NSCAD**, say 30% of the total, with product coding to be able to allocate revenues from the sales.
45. **The store will be operated by AGNS staff** and volunteers as opposed to being concessioned out. This will enable the Gallery to ensure an operation consistent with its mission and also serve to retain as much revenue as possible.
46. **The store will be integrated with admissions/information** to allow the same staff to operate both during slower attendance periods.
47. The **retail store will be visible from and accessible to persons who do not pay to enter the facility** in order to expose the retail store to more than Gallery visitors. In fact, access to an art gallery/museum retail store is another way to break down the intimidation factor experienced by some people with respect to attending a public art museum.
48. The **product line will include** a selection of collection related and other art and craft books and journals, specialty art supplies, reprints, NSCAD student works for sale and also items that reflect the AGNS and NSCAD brands.

4.10.2 CAFÉ

There is a 1,470 sq. ft. privately operated café space in the AGNS building, which pays 5% of gross sales and catering to AGNS. This is expected to generate close to \$18,000 in the current fiscal year.

49. It is assumed there will be a café within AGNS and no café or other food service operation within NSCAD.

50. The AGNS café will continue to be concessioned out to a private operator who will also be the exclusive caterer for events/rentals in the AGNS, as discussed further below. The menu and pricing will be similar to that of the current café operation.

4.10.3 RENTALS

Rental of spaces in museums and galleries for functions and other events is the fastest growing revenue center for museums/galleries and most new facilities are being designed to maximize income from this source. Among the various museum types art museums/galleries are the most successful in generating income from rentals. Lobbies are being designed as multi-purpose, to not only provide gathering spaces, ticketing and information but also larger than needed for those purposes in order to generate rentals income. Rental opportunities using lobbies during evening hours when museums are usually closed creates a very efficient use of the space and often helps to meet the desire for unique spaces. Some museums/galleries have developed other multi-purpose spaces to enable rentals to take place during museum open hours. This is the recommended approach for the new AGNS as set out above in the space and facilities program. Recommendations/assumptions associated with facility rentals are as follows:

51. There will be two primary spaces used for facility rentals. One will be the **proposed Multi-Purpose Reception Hall, to include waterfront views**, and the second the lobby during evening hours when the Gallery is otherwise closed. Other spaces available for rental include the Theatre, classroom and studio space. The school lunchroom will also be available on weekends for birthday parties.
52. The AGNS will designate a **preferred caterer** to have near exclusive rights to events, with opportunities for other caterers for special circumstances like kosher or other specialty foods. It is assumed the caterer will have access to kitchen facilities.
53. There will be opportunities for NSCAD to generate rental income from the use of the auditorium in its space by performing arts and other groups.

4.10.4 MEMBERSHIP

There are essentially two main motivations for membership. The most common, particularly for the lower level membership categories such as family, individual and student, is value for money spent in unlimited free admission, discounts on retail purchases, programs and rentals. A second motivation is love of the institution and what it represents or associated civic pride. These persons tend to become upper level members, in categories with names like patron, sustainer, benefactor, etc. and are easier to transition to donor categories. At the AGNS the upper level categories are Gallery Circle, (\$150-\$299), Curator's Circle (\$300-\$499), Director's Circle (\$500-\$999), and Chairperson's Circle (\$1,000 and up). The upper level members receive tax receipts, guest passes, discounts on space rentals and other benefits that vary by level. The NSCAD galleries have no membership program and it is not needed in the context of the co-located facility.

Rates for lower level memberships of AGNS are currently as follows, with **increases to reflect increased admission charges**:

| | Current | Assumed |
|--------------------------------|-----------------------|-----------------------|
| Individual | \$60 | \$70 |
| Family/Dual | \$85 | \$95 |
| Senior (60+) | \$40 | \$50 |
| Senior Couple (60+) | \$60 | \$70 |
| Student | \$30 (but NSCAD free) | \$40 (but NSCAD free) |
| Non-Profit Organization | \$50 | \$60 |

Upper level membership categories for AGNS include corporate (\$100) and a variety of “Circle” categories” ranging from \$100 to \$1,000, which are part of donation income for the AGNS.

54. The AGNS will introduce a **corporate membership**.
55. For upper level membership we recommend introduction of **guest passes** distributed through social service agencies, religious institutions and schools to those who cannot afford admission in varying amounts depending on the level of “Circle” membership. Tax receipts should be issued to the upper level members who participate.

4.10.5 OTHER SOURCES OF INCOME

Additional recommendations/assumptions associated with earned and other income sources are as follows:

56. It is assumed that a **Foundation or other entity to support the AGNS** will be established and that it will not only help to raise capital funds but also a fund to support a larger operating endowment. The AGNS has an endowment whose principal is \$3.6 million.
57. Design of the AGNS will include planning for a very attractive staircase that would be a highly desired great **photo opportunity** associated with weddings.
58. A **menu of sponsorship and programming opportunities** will be developed and promoted to potential private funders. This might include sponsored free admission tickets for children and school groups, sponsored staff positions and other ideas developed by management.
59. The AGNS will encourage a volunteer to create an **interactive donation box** that not only seeks funds on the basis of supporting the mission of the institution but also on interactive features in which the box responds mechanically to the donation of money, perhaps something related to the mixing of colors. Additional sources of revenue for NSCAD as a consequence of the co-location could include a larger audience for its successful fashion show, which is also supported by donations.

4.11 MARKETING

The best form of marketing is the product or visitor experience itself as it leads to favourable word of mouth. A very good site and much improved facilities featuring high quality exhibition space and enhanced public and educational programs will help to boost resident, school and tourist attendance for the AGNS. Nonetheless additional marketing expenditures and other initiatives will also be required. For example, it is recommended/assumed that:

60. **The AGNS marketing budget will increase** to help boost awareness and attendance levels and exposure to revenue centers, but also reflect the need to control operating costs. The NSCAD marketing and public relations budget will also increase as part of a strategy to bolster enrolments and public relations exposure for the university.
61. The AGNS **web site and brochure** will focus very much on showing people enjoying their experiences and to communicate the opportunities available to visitors.
62. Given the visual nature of an art gallery, **media placement** will focus primarily on print, web-based and social media.

4.12 OTHER ASSUMPTIONS

63. The AGNS and NSCAD will not be responsible for payment of any property **taxes**.
64. It is assumed that **building occupancy costs** will be separate with the province of Nova Scotia continuing to be responsible for the AGNS costs while NSCAD would pay for these costs associated with its separate spaces.
65. The project will be free of debt and there would consequently be **no annual outlay for debt service** payable by the AGNS or NSCAD.
66. All revenue and expense projections will be stated in year **2017 constant dollars**, thus a specific inflation factor is not included in our estimates. However, some revenues and expenses tend to increase at a higher rate than the rate of inflation. For example, staff compensation levels (salaries, wages, benefits and taxes) will be projected to grow on an annual basis by 0.5% above the prevailing rate of inflation each year for the AGNS. Increases that reflect a primarily unionized faculty and staff for NSCAD are calculated separately.

It must be noted that financial projections are subject to the inherent uncertainties of the future. There is no representation that the projections will be realized in whole or in part. However, taking the assumptions into account and based on the scope of our work, we believe the projections set out in Chapter 5 are reasonable.

5. ATTENDANCE, OPERATING REVENUE AND EXPENSE PROJECTIONS

This chapter sets out attendance, operating revenue and expense projections for an expanded and relocated Art Gallery of Nova Scotia (AGNS) assuming a stand-alone site on the Halifax waterfront Salter Block and also assuming a co-location with the Nova Scotia College of Art and Design (NSCAD) University on the same site. The projections focus very much on the AGNS as a public art gallery dependent on visitor attendance and the generation of earned income. That is much less applicable to NSCAD as an institution of higher learning and so the projections applied to NSCAD include fewer and sometimes different revenue categories.

The projections for the AGNS and NSCAD are for the opening three years of operation in both scenarios, recognizing that Year 3 will be representative of subsequent years of operation. Although a blockbuster level exhibition at AGNS may take place to affect the staffing and other operational assumptions and projections it is not assumed within the opening three years of operation. The revenue and expense figures for AGNS also integrate the Yarmouth satellite operation.

The projections are based on the contextual/comparables analyses in Chapter 2, the market analysis in Chapter 3 and the site, space, visitor experience, operational and other recommendations/ assumptions in Chapter 4, as well as the judgment and substantial experience of the consultants and AGNS and NSCAD staff.

All revenue and expense figures are in constant 2017 dollars. However, some revenues and expenses, including staffing costs, are estimated to increase at a rate above whatever the prevailing rate of inflation is. These are indicated where applicable.

The projections build upon a base level that is the rounded mid-point of the FY2016 actual revenue and expense figures and the FY2017 budget figures for the AGNS, plus adjustments as advised. The base level of NSCAD is the FY2016 actuals and takes into account current figures, as provided.

5.1 ATTENDANCE PROJECTIONS

It has been assumed that the Anna Leonowens Gallery will be a free admission gallery in an area to be owned by NSCAD but for the visiting public the gallery experience will be very much seamless with the AGNS. Visitors to paid AGNS exhibitions will have free access to the Anna Leonowens Gallery and while there will be some persons who enter the building only to attend the Anna Leonowens Gallery there will also be AGNS visitors who choose not to attend it despite the free admission. Therefore the focus of the attendance projections is largely on the Art Gallery of Nova Scotia and assumed to be also to the Anna Leonowens Gallery.

To estimate the number of visitors likely to attend the future AGNS and the Anna Leonowens Gallery first requires a reasonable definition of who would or would not be defined as a visitor. For the purposes of this analysis a visitor is someone who attends an exhibition or program within the facility, including those who attend evening rentals in AGNS spaces. This definition excludes persons who only use the gift shop or café or who are served on outreach programs. It also excludes staff and volunteers, service and delivery people and those who access either AGNS or NSCAD through the internet.

5.1.1 BENCHMARKS FOR ON-SITE ATTENDANCE PROJECTIONS

Benchmarking data detailed in Chapter 2 help to establish parameters for the attendance projections and consideration of how attendance levels might vary if the AGNS were standalone or co-located with NSCAD on the Salter Block. The benchmarking and associated analyses lead to various ratios, and while each has its weaknesses, they have been used to inform our judgment regarding the likely level of attendance. It must be noted, however, that comparing attendance levels is inherently risky since there are a variety of definitions of what constitutes a visitor and uncertainty regarding the accuracy of the data reported.

The attendance impact on AGNS of a co-location with NSCAD is not easily quantifiable given the fact that there were no examples found of co-locations involving art galleries/museums and educational institutions that are organizationally separate. However, as set out in Chapter 2.3 and Appendix B of this report, there are attendance advantages of co-locations of art museums and educational institutions that are organizationally related. **Based on these co-locations and our judgment and experience we have estimated a 5% attendance increment associated with the NSCAD co-location. This has been applied to each of the ratios in which there are no quantifiable size differences.**

5.1.1.1 Extrapolation from Base Level Figures of the AGNS and the Anna Leonowens Gallery

The attendance figures for the existing AGNS cannot be comparable to what is being planned for the expanded and relocated new AGNS facility but it is nonetheless a common method to extrapolate attendance based on a ratio of existing visitors per sq. ft. of exhibition space.

The AGNS has averaged about 37,000 annual on-site visitors, both paid and free, over the past several years. The paid admissions (averaging about 19,000) category also includes visits from complimentary passes and member visits. The existing AGNS offers about 19,500 nsf of exhibition space. That translates to about 1.90 visitors per net square feet of exhibition space. In general an attendance per square foot ratio increases with a better product but the ratio declines in a larger space. The assumption for the future AGNS is for a total of 27,750 nsf of exhibition space if standalone and 29,750 nsf, including the seamlessly accessed Anna Leonowens Gallery, if co-located. ***If the current 1.90 visitors per net sq. ft. ratio of base level attendance is applied to the new AGNS it suggests about 52,700 on-site visitors in a stabilized attendance year for the stand-alone scenario and about 56,500 visitors assuming co-location.*** This method, however, does not take into account site and other qualitative factors, including easier access by free admission NSCAD students and is clearly below a reasonable range.

5.1.1.2 Benchmarks from Canadian Art Galleries

Three methods are used that consider benchmarks from other Canadian art galleries that may help to inform attendance projections at the AGNS. One is based on operating budgets, the second on exhibition space and the third on population.

Operating Budgets:

Data in Chapter 2.2 indicate that the average attendance of Canadian art galleries with a medium-sized \$2.2 million operating budget is about 56,500 annual visitors. The current AGNS operating budget is in the range of \$3.9 million, 77% higher. This suggests the opportunity for a better located and enhanced AGNS to achieve attendance levels higher than the 56,500 average. Applying the 77% ratio to the average figure for Canadian art galleries suggests an attendance total of about ***100,000 annual visitors in the stand-alone scenario and 105,000 in the co-location.***

Visitors per Square Foot Exhibition Space:

The following table updates ratios of visitors per square foot for the art galleries used as comparables in the 2012 Business Plan for the AGNS prepared by Lord Cultural Resources. The assumption is for 27,750 net square feet of exhibition space in the stand-alone scenario. Applying the 3.4 visitors per square foot exhibition space ratio from the comparables suggests an attendance total of about ***94,400*** annual visitors to the AGNS. With 29,750 net square feet assumed in the co-location scenario that leads to an attendance estimate of ***101,200 visitors.***

Visitors per Thousand Metro Population:

| Ratios from Selected Canadian Art Galleries | Reported On-Site Attendance | Exhibition Space | Visitors per Sq. Ft. Exhibition Space | 2016 Metro Population | Visitors per Thousand Metro Population |
|---|-----------------------------|------------------|---------------------------------------|-----------------------|--|
| Art Gallery of Alberta, Edmonton | 80,000 | 30,130 | 2.7 | 1,392,600 | 57.4 |
| Art Gallery of Greater Victoria | 100,000 | 35,100 | 2.8 | 370,900 | 269.6 |
| Vancouver Art Gallery | 260,000 | 57,500 | 4.5 | 2,548,700 | 102.0 |
| Art Gallery of Hamilton | 160,000 | 32,400 | 4.9 | 778,400 | 205.5 |
| McMichael Canadian Collection, Vaughan | 90,000 | 28,090 | 3.2 | 6,242,300 | 14.4 |
| Average | 138,000 | 36,644 | 3.6 | 2,266,580 | 129.8 |
| Median | 100,000 | 32,400 | 3.2 | 1,392,600 | 102.0 |
| Mid-Point | 119,000 | 34,522 | 3.4 | 1,829,590 | 115.9 |
| Excluding McMichael for Population | | | | | 156.2 |

Source: 2016 Canadian Census, published attendance data and 2012 Lord report data on exhibition space

The table above also indicates a ratio of 156.2 visitors per 1,000 population data based on 2016 Census Metropolitan Area (CMA) figures and applied to the 425,900 Halifax CMA population. The data indicate an attendance of **66,500 annual visitors in the stand-alone scenario and about 68,800 in the co-location scenario.**

5.1.1.3 Ranking AGNS Against Other Halifax Waterfront Museums

As discussed in Chapter 2.4, there are two existing major museums along the Halifax waterfront. This method seeks to consider what features of the AGNS might lead to higher or lower attendance than the latest figures for the Maritime Museum of the Atlantic and Pier 21.

Attendance levels at the Maritime Museum of the Atlantic have generally been increasing over the past three years and averaged about 160,000 annual visitors during that period. Pier 21 attendance levels have increased substantially from the 45,000 annual visitor level five years ago to about 130,000, largely because of a focus on facility levels. Both of these sites benefit from location along the waterfront walkway and access from cruise ship passengers. The AGNS and Anna Leonowens Gallery will also receive these benefits, as well as far more substantial rentals visitors given an assumed waterfront location and view.

In our judgment the AGNS will attract fewer visitors than the Maritime Museum since it offers the mass market appeal of the Titanic story, and fewer than Pier 21 because of its uniqueness. We estimate attendance figures for the stand-alone AGNS in the range of **90,000 visitors per year in a stabilized year of operation, and 95,000 assuming co-location with NSCAD.**

5.1.1.4 Averaging of Figures from the Benchmarks

It is clear that there is no single or simple formula that leads to accurate attendance projections. Accordingly, although each of the benchmarks above has weaknesses they have been averaged to provide a starting figure for attendance projections that will be modified to also take into account various qualitative factors discussed below. ***The table here indicates that once all the estimates are averaged, attendance at the Art Gallery of Nova Scotia would be in the range of 80,500 visitors in a stabilized year of operation, including persons attending on-site exhibitions, programs, events and evening rentals assuming a stand-alone operation, or 85,300 assuming co-location with NSCAD.***

| Benchmarking Method | AGNS Stand-Alone Attendance | AGNS Co- Location Attendance |
|---|-----------------------------|------------------------------|
| Extrapolation from Base Level Figures for AGNS | 52,700 | 56,500 |
| Benchmarks Based on Operating Budgets of Canadian Art Galleries | 100,000 | 105,000 |
| Benchmarks Based on Size of Exhibition Space at Selected Canadian Art Galleries | 94,400 | 101,200 |
| Benchmarks Based on Metro Population of Selected Canadian Art Galleries | 65,500 | 68,800 |
| Ranking AGNS Against Other Halifax Waterfront Museums | 90,000 | 95,000 |
| Average from Benchmarks (rounded) | 80,500 | 85,300 |

5.1.2 FACTORS SUGGESTING HIGHER OR LOWER ATTENDANCE PROJECTIONS FOR AGNS

The ratios above suggest an attendance range in a stabilized year of operation (Year 3) of about 80,500 visitors to the Art Gallery of Nova Scotia assuming a stand-alone operation and 85,300 assuming a co-location with NSCAD. The following points represent factors that suggest actual attendance levels will be either higher or lower than indicated in the various ratios and also consider the impact of the co-location with NSCAD:

Positive Factors:

- **A Site Along the Waterfront Walkway:** This is a very positive feature and ideally the design of the building will allow visual access to some studio and programming spaces to help break down the intimidation factor that some people have about attending an art gallery. Positive to attendance in the co-location scenario is that NSCAD students from the Port campus will have easier access to the co-located campus and thus both the AGNS and the Anna Leonowens Gallery. These aspects should help to boost attendance levels.

- **Visitor Experience Oriented to the General Public:** The substantial emphasis on participatory art programs and art-science-technology links with NSCAD along with more capacity for hands-on studio learning should lead to higher attendance than indicated by the ratios above.
- **Limited Art Gallery Competition:** The other art galleries in the Halifax area are university galleries with limited space and limited ability to attract substantial numbers of visitors. This is positive for potential attendance at the new AGNS and for exposure to the NSCAD Anna Leonowens Gallery.
- **Population, Educational and Income Market Indicators are Mixed:** The population of the Halifax Regional Municipality (HRM) grew from 390,096 in 2011 to 403,131 in 2016, an increase of 3.3% compared to the national growth rate during that period of 5.0%. The other demographic data in Chapter 3.2.1 indicate somewhat higher levels of educational attainment and income for HRM residents than the national average, although the figures for Nova Scotia as a whole are lower. It is persons with higher levels of educational attainment and income who are more likely to attend museums in general and art galleries in particular. The market data are somewhat positive.
- **More Substantial Marketing Expenditures:** An assumption of an increased marketing budget should help to increase attendance levels somewhat, recognizing that there is a need to limit the size of the operating budget, including marketing expenditures.

Negative Factors:

- **More Competition for Facility Rentals:** This includes not only Pier 21 but also the very successful Halifax Public Library. This increased competition will have a negative impact on rentals attendance relative to the assumptions and estimates in 2012.
- **Changed Assumptions Regarding Admission Charges:** The assumption in 2012 was for fixed admission charges during the six warmer weather months and admission by donation for the other months, including free admission to school groups. The current assumption is for fixed admission charges year-round and charged admission to school groups but continued free admission to children 12 and under. In 2012 the assumption was for continued free admission on Thursday evenings but the assumption for the purposes of this study is half-price admission on Thursday evenings and more of an emphasis on the additional programming offered during this period. Relative to the attendance projections in 2012 these modified assumptions will result in lower attendance but more admissions revenue per visitor.
- **Declining School Enrollment and Fewer Field Trips Balanced Against More Studio Opportunities:** The declining enrollment and a trend to fewer field trips for financial reasons suggests greater challenges in attracting school markets and, along with charged admission to school groups, therefore represents a negative factor associated with potential attendance. However, this is offset somewhat by an assumed greater emphasis on studio opportunities and joint programming with NSCAD.

Taking the points above into consideration suggests that the positive factors outweigh the negative ones somewhat and thus an attendance level in a stabilized year of operation that is somewhat higher than indicated in the ratios. Given the greater cross-over visits in a co-location relative to a stand-alone we estimate attendance levels in stabilized Year 3 at **90,000 visitors assuming a stand-alone AGNS and 95,000 assuming a co-location with NSCAD.**

5.1.3 PROJECTED ATTENDANCE PATTERNS AND LEVELS

Virtually all new and relocated/expanded museums or galleries experience their highest attendance level in the first year. This is because of the novelty factor and the media attention paid to a newly opened or reopened attraction, which causes area residents to be more likely to attend. Opening year attendance for AGNS is estimated to be a common 20% higher than the stabilized stand-alone Year 3 figure of 90,000 because of this phenomenon. We estimate Year 2 attendance at about 5% higher than the stabilized Year 3. We have also estimated a 5% increment applied to the attendance estimates each year to take into account the positive impact of the co-location with NSCAD.

Given the foregoing the rounded attendance projections for the AGNS over the three years projected is as follows, with Year 3 representative of subsequent attendance years:

| Annual Attendance | Stand-Alone AGNS | Co-Located AGNS |
|-------------------|------------------|-----------------|
| Year 1 | 105,000 | 110,000 |
| Year 2 | 95,000 | 100,000 |
| Year 3 | 90,000 | 95,000 |

Taking into account that the most important factor affecting attendance will be the specific exhibitions to be offered at the time, the attendance projections are segmented as follows:

- Attendance by Weekday/Weekend and Design Day Attendance:** Most museum-related institutions report about equal attendance between weekdays and weekends. The existing AGNS reported about 65% on weekdays to reflect free school group and free Thursday evening attendance. This is assumed to decline to a more common 55% at a tourism-friendly site, with charged admission to school groups and assumed half-price rather than free admission Thursday evenings. The weekday/weekend estimate helps to calculate “design day” attendance. A design day represents a higher than average day in a higher attendance month that leads to an estimate of the number of people in the building at one time. Although attendance levels at art galleries vary less on the basis of season than on the specific exhibitions in place the substantially higher tourism levels in the summer, particularly along the waterfront, should lead to higher attendance in July and August. We have assumed the design month at 15% higher than average and that 30% of daily visitors will be in the building at one time.

- **Attendance by Main Market Segment:** Chapter 3 sets out our analysis of potential markets. Resident market attendance is likely to be highest in the opening year, while tourist attendance should grow over time and school attendance will be fairly steady. With rounding, no difference is estimated for the stand-alone or co-location scenarios.
- **Attendance by Ticket Category:** The highest percentage of paid visitors (25%) will be in the large adult ticket category, with seniors, defined as 60 plus at 15% and youth (13-24) and free admission children at about 10% each. Assuming charged admission for school groups we project them at about 5% of substantially more visitors with tour groups and cruise passengers at 5%. Indirect paid visitors are those who have paid for entry on the basis of membership, public programs and evening rentals. In addition to children 12 and under, unpaid visitors include NSCAD students, researchers, VIPs and others offered free admission. Combined, the indirect paid and unpaid visitors are estimated to represent 30% of total visitation compared to the current figure of over 40%. No significant differences in these percentages are estimated for the stand-alone or co-location scenarios.

| AGNS Projected Attendance (rounded) | Base | Year 1 | Year 2 | Year 3 | Year 1 | Year 2 | Year 3 | Year 1 | Year 2 | Year 3 | Year 1 | Year 2 | Year 3 |
|--|---------------|------------------|-------------|-------------|-------------|-------------|-------------|------------------|---------------|---------------|----------------|----------------|---------------|
| | | AGNS Stand-Alone | | | Co-Located | | | AGNS Stand-Alone | | | Co-Located | | |
| Projected Total On-Site Attendance | 37,000 | | | | | | | 105,000 | 95,000 | 90,000 | 110,000 | 100,000 | 95,000 |
| Attendance by Weekday/Weekend | | | | | | | | | | | | | |
| Weekdays | 65% | 55% | 55% | 55% | 55% | 55% | 55% | 57,750 | 52,250 | 49,500 | 60,500 | 55,000 | 52,250 |
| Weekend Days | 35% | 45% | 45% | 45% | 45% | 45% | 45% | 47,250 | 42,750 | 40,500 | 49,500 | 45,000 | 42,750 |
| Total | | | | | | | | 105,000 | 95,000 | 90,000 | 110,000 | 100,000 | 95,000 |
| Design Day Calculation | | | | | | | | | | | | | |
| Total Projected Attendance | | | | | | | | 105,000 | 95,000 | 90,000 | 110,000 | 100,000 | 95,000 |
| Total Weekend Attendance | | | | | | | | 47,250 | 42,750 | 40,500 | 49,500 | 45,000 | 42,750 |
| Average Weekend Day Attendance | | | | | | | | 454 | 411 | 389 | 476 | 433 | 411 |
| Weekend Day Attendance in Higher Attendance Month (15% above average) | | | | | | | | 522 | 473 | 448 | 547 | 498 | 473 |
| Maximum Number of People in Building at One Time (30% of daily total) | | | | | | | | 157 | 142 | 134 | 164 | 149 | 142 |
| Attendance by Main Segment | | | | | | | | | | | | | |
| Residents (50-mile radius) | 70% | 65% | 60% | 55% | 65% | 60% | 55% | 68,250 | 57,000 | 49,500 | 71,500 | 60,000 | 52,250 |
| School Groups | 15% | 5% | 5% | 5% | 5% | 5% | 5% | 5,250 | 4,750 | 4,500 | 5,500 | 5,000 | 4,750 |
| Tourists | 15% | 30% | 35% | 40% | 30% | 35% | 40% | 31,500 | 33,250 | 36,000 | 33,000 | 35,000 | 38,000 |
| Total | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 105,000 | 95,000 | 90,000 | 110,000 | 100,000 | 95,000 |
| Attendance by Ticket Category | | | | | | | | | | | | | |
| Adult (25-59) | | 25% | 25% | 25% | 25% | 25% | 25% | 26,250 | 23,750 | 22,500 | 27,500 | 25,000 | 23,750 |
| Senior (60+) | | 15% | 15% | 15% | 15% | 15% | 15% | 15,750 | 14,250 | 13,500 | 16,500 | 15,000 | 14,250 |
| Youth (13-24) | | 10% | 10% | 10% | 10% | 10% | 10% | 10,500 | 9,500 | 9,000 | 11,000 | 10,000 | 9,500 |
| Child (0-12) | | 10% | 10% | 10% | 10% | 10% | 10% | 10,500 | 9,500 | 9,000 | 11,000 | 10,000 | 9,500 |
| School Groups | | 5% | 5% | 5% | 5% | 5% | 5% | 5,250 | 4,750 | 4,500 | 5,500 | 5,000 | 4,750 |
| Non-School Groups | | 5% | 5% | 5% | 5% | 5% | 5% | 5,250 | 4,750 | 4,500 | 5,500 | 5,000 | 4,750 |
| Indirect Paid/Other Unpaid | | 30% | 30% | 30% | 30% | 30% | 30% | 31,500 | 28,500 | 27,000 | 33,000 | 30,000 | 28,500 |
| Total | | 100% | 100% | 100% | 100% | 100% | 100% | 105,000 | 95,000 | 90,000 | 110,000 | 100,000 | 95,000 |

5.2 PROJECTED OPERATING REVENUES

The projections of operating revenues during the first three years of operation of a stand-alone and co-located Art Gallery of Nova Scotia (AGNS) and a co-located Nova Scotia College of Art and Design University (NSCAD) are set out in the following categories:

- Admissions - AGNS
- Retail Sales – AGNS and NSCAD
- Paid Membership - AGNS
- Café Concession - AGNS
- Facility Rentals – AGNS and NSCAD
- Public and Educational Programs/Extended Studies – AGNS and NSCAD
- Fundraising Events (net) - AGNS
- Other Earned/Miscellaneous Income – AGNS and NSCAD
- Tuitions, Student Fees and Student Material Fees - NSCAD
- Existing Endowment – AGNS
- Existing Private Support – AGNS and NSCAD
- Existing and Assumed Government Support – AGNS and NSCAD

Grant, endowment and private support will change for both AGNS and NSCAD on an annual basis. However, for the purposes of these projections, grant, endowment and private support is shown to be maintained for AGNS at the base level for each year projected. This will allow the bottom line of the projections to be projected expenses minus projected earned and endowment income to indicate the amount required from additional government, endowment and private sources to break even on operations in both the stand-alone and co-location scenarios.

5.2.1 ADMISSIONS - AGNS

In FY2016 the AGNS generated about \$94,400 from admissions revenue and is forecasting about \$112,200 in the current year. The mid-point of \$103,300 has been established as the base level. Applied to the base level 37,000 annual visitors, both paid and free, this indicates about \$2.79 per visitor. The assumption regarding admission charges is that the current adult admission charge will increase to \$14.00, with lower charges for seniors and youth and school groups as set out in Chapter 4 as well as free admission for children.

Indirect paid visitors include members, rentals and programs visitors and along with other unpaid visitors are estimated to account for 30% of total visitors. AGNS will also offer discounts with other museums, hotels, CAA/AAA, etc. and is assumed to offer half price rather than free Thursday evenings. For the purposes of these projections we estimate that discounts will reduce total admissions revenue by 10% in both scenarios, recognizing that the discounts help to boost attendance levels. In addition, since the admission prices include HST, 15% is deducted from the total.

These estimates and assumptions lead to the following projections.

| AGNS Admission Revenue (rounded) | | | AGNS Stand Alone Scenario | | | | | | AGNS/NSCAD Co-Location Scenario | | | | | |
|------------------------------------|------------------|---------|---------------------------|-------------------|-----------------|-------------------|-----------------|-------------------|---------------------------------|-------------------|-----------------|-------------------|-----------------|-------------------|
| Ticket Categories | Base Level | Charge | Year 1 Visitors | Year 1 Admissions | Year 2 Visitors | Year 2 Admissions | Year 3 Visitors | Year 3 Admissions | Year 1 Visitors | Year 1 Admissions | Year 2 Visitors | Year 2 Admissions | Year 3 Visitors | Year 3 Admissions |
| Adult (25-59) | | \$14.00 | 26,250 | \$367,500 | 23,750 | \$332,500 | 22,500 | \$315,000 | 27,500 | \$385,000 | 25,000 | \$350,000 | 23,750 | \$332,500 |
| Senior (60+) | | \$12.00 | 15,750 | \$189,000 | 14,250 | \$171,000 | 13,500 | \$162,000 | 16,500 | \$198,000 | 15,000 | \$180,000 | 14,250 | \$171,000 |
| Youth (13-24) | | \$11.00 | 10,500 | \$115,500 | 9,500 | \$104,500 | 9,000 | \$99,000 | 11,000 | \$121,000 | 10,000 | \$110,000 | 9,500 | \$104,500 |
| Child (0-12) | | \$0.00 | 10,500 | \$0 | 9,500 | \$0 | 9,000 | \$0 | 11,000 | \$0 | 10,000 | \$0 | 9,500 | \$0 |
| School Groups | | \$5.00 | 5,250 | \$26,250 | 4,750 | \$23,750 | 4,500 | \$22,500 | 5,500 | \$27,500 | 5,000 | \$25,000 | 4,750 | \$23,750 |
| Non-School Groups (avg.) | | \$10.00 | 5,250 | \$52,500 | 4,750 | \$47,500 | 4,500 | \$45,000 | 5,500 | \$55,000 | 5,000 | \$50,000 | 4,750 | \$47,500 |
| Indirect Paid/Other Unpaid | | \$0.00 | 31,500 | \$0 | 28,500 | \$0 | 27,000 | \$0 | 33,000 | \$0 | 30,000 | \$0 | 28,500 | \$0 |
| Total before discounts | | | 105,000 | \$750,750 | 95,000 | \$679,250 | 90,000 | \$643,500 | 110,000 | \$786,500 | 100,000 | \$715,000 | 95,000 | \$679,250 |
| Total after discounts (10%) | | | | \$675,675 | | \$611,325 | | \$579,150 | | \$707,850 | | \$643,500 | | \$611,325 |
| Total after 15% for HST | \$103,300 | | | \$574,324 | | \$519,626 | | \$492,278 | | \$601,673 | | \$546,975 | | \$519,626 |
| Admissions Revenue per Visitor | \$2.79 | | | \$5.47 | | \$5.47 | | \$5.47 | | \$5.47 | | \$5.47 | | \$5.47 |

5.2.2 RETAIL SALES - AGNS AND NSCAD

The current AGNS retail store is 627 net sq. ft. It generated about \$146,100 in gross sales in FY2016 and is budgeted at \$112,200 in the current year. The base level is the mid-point of about \$129,200, or about \$206 per net square foot and \$3.49 per visitor. NSCAD currently operates with an art supply store that generated \$300,000 in sales in FY2016. However, in the co-location scenario it is assumed there will no longer be a separate NSCAD store. Rather, there will be 1,800 net sq. ft. of public space devoted to a retail store to be operated by AGNS with 30% of the shelf space (540 sq. ft.) available to NSCAD and whose revenues will accrue to NSCAD. In a stand-alone scenario the entirely AGNS retail space would be smaller at 1,400 nsf.

Taking into account the assumed hiring of a Retail Manager, we estimate retail sales per visitor of AGNS products on the basis of \$3.25 per visitor in Year 1 of the stand-alone scenario and \$3.15 per visitor in the co-location scenario because many of the additional visitors to the co-located facility will be NSCAD students. It must be recognized in considering sales per visitor that the higher the attendance, particularly among the general public as opposed to art enthusiasts, the lower the average sales per visitor.

Sales per visitor take into account purchases by non-visitors as well as discounts to members and are projected to grow slightly beyond the prevailing rate of inflation in subsequent years to reflect better product and market knowledge over time.

For NSCAD, a much larger attendance but a smaller allocation of space in the co-located facility will expose more people to its retail products, a combination of specialty art supplies, branded items and the works of students. The NSCAD sales per visitor are estimated to be in the range of \$1.20 - \$1.30.

The assumptions and estimates above lead to the following retail sales projections. (Costs of goods sold are included with the expense projections while staffing and other overhead costs are included with those expense projections later in this chapter.)

| Retail Sales | Base Level | AGNS Stand-Alone Scenario | | | AGNS/NSCAD Co-Location Scenario | | |
|--|------------------|---------------------------|------------------|------------------|---------------------------------|------------------|------------------|
| | | Year 1 | Year 2 | Year 3 | Year 1 | Year 2 | Year 3 |
| Art Gallery of Nova Scotia | | | | | | | |
| Total Size of Public Retail Space (nsf) | 627 | 1,400 | 1,400 | 1,400 | 1,260 | 1,260 | 1,260 |
| Total On-Site Attendance | 37,000 | 105,000 | 95,000 | 90,000 | 110,000 | 100,000 | 95,000 |
| Sales per Visitor | \$3.49 | \$3.25 | \$3.30 | \$3.35 | \$3.15 | \$3.20 | \$3.25 |
| Total Sales | \$129,200 | \$341,250 | \$313,500 | \$301,500 | \$346,500 | \$320,000 | \$308,750 |
| Sales Per Sq. Ft. | \$206 | \$244 | \$224 | \$215 | \$275 | \$254 | \$245 |
| Nova Scotia College of Art and Design | | | | | | | |
| Total Size of Public Retail Space (nsf) | | | | | 540 | 540 | 540 |
| Total On-Site Attendance | | | | | 110,000 | 100,000 | 95,000 |
| Sales per Visitor | | | | | \$1.20 | \$1.25 | \$1.30 |
| Total Sales | \$325,000 | | | | \$132,000 | \$125,000 | \$123,500 |
| Sales Per Sq. Ft. | | | | | \$244 | \$231 | \$229 |

5.2.3 PAID MEMBERSHIPS - AGNS

There are two levels of membership, lower and upper. In some museums or art galleries both are reflected in the membership revenue category. The AGNS allocates upper or donor level membership revenue to donations. In FY2016 the AGNS reported 2,390 total memberships, but this includes unpaid membership for all NSCAD students, life members and permanent collection artists. Excluding the free memberships, there were 1,212 paid memberships in AGNS in FY2016. In that year, membership revenues totaled a rounded \$50,500 or \$42 per paid membership. In the current year, the membership revenue is budgeted to decline to about \$45,500. The mid-point base level is therefore \$48,000, or \$40 per paid membership.

The excitement of the new facility should lead to an increase in paid memberships. The level of that increase will not match attendance growth because tourists are unlikely to purchase a membership. Taking into account the foregoing assumptions and analyses, including more dynamic programming and more changes in the exhibitions on views, as well as the experience of other art galleries, we estimate that the Art Gallery of Nova Scotia will open with 2,400 paid memberships and that, like attendance levels, membership totals will decline in subsequent years to a stabilized level in Year 3 in the stand-alone AGNS scenario. Taking into account the increased membership charges we estimate memberships as follows, with a modest increase in the number of paid memberships to reflect positive feelings about the concept of co-location.

These assumptions lead to the following projections of paid membership revenues for the AGNS.

| Paid Memberships Art Gallery of Nova Scotia | Base Level | AGNS Stand-Alone Scenario | | | AGNS/NSCAD Co-Location Scenario | | |
|--|-----------------|---------------------------|------------------|------------------|---------------------------------|------------------|------------------|
| | | Year 1 | Year 2 | Year 3 | Year 1 | Year 2 | Year 3 |
| Total Memberships | 1,212 | 2,400 | 2,200 | 2,100 | 2,450 | 2,250 | 2,150 |
| Average Revenue per Membership | \$40 | \$55 | \$56 | \$57 | \$55 | \$56 | \$57 |
| Total Revenue | \$48,000 | \$132,000 | \$123,420 | \$120,166 | \$134,750 | \$126,225 | \$123,027 |

5.2.4 CAFÉ CONCESSION - AGNS

The AGNS currently operates with a 1,470 nsf café space that is concessioned out to a private operator and is paid 6% of gross sales. Since the café opened in April 2016 there were no revenues reported in fiscal 2015-2016. It is estimated by AGNS projections, that \$17,800 will be paid in fiscal 2016-17 and will grow slightly to \$18,000 per year under the current contract. The base level has therefore been established at \$18,000.

Given the substantial existing and new food service opportunities to be developed along the waterfront we have recommended and assumed a slightly smaller café within AGNS at 1,250 nsf regardless of the co-location with NSCAD or not. The café is assumed to continue to be concessioned out to a private operator which will also be the preferred caterer for events/rentals in the AGNS. The new site should enable the concessionaire to pay a higher rent on the basis of the far more substantial foot traffic on the waterfront walkway, which is leisure oriented in the warmer weather months. The site is also close enough to office buildings to be able to attract government and other office workers, as well as the growing number of nearby residents.

Although the amount of the concession/rent paid to the AGNS will be subject to future negotiation, for the purposes of these projections we estimate an increase in the amount payable to AGNS to \$2,500 per month, regardless of the gross sales, and that this amount will be constant during the three years projected. The concessionaire would also not be responsible for utility costs associated with the café operation. This indicates **\$30,000 per year in income to the AGNS, with no difference in the stand-alone and co-location scenarios.**

5.2.5 FACILITY RENTALS - AGNS AND NSCAD

In FY2016 the AGNS generated about \$48,800 in rentals income. Of this, \$18,000 was from rental of space by the Teichert Art Sales and Rental, which is assumed continue to operate within the new waterfront AGNS facility. The budget for all rental income, including facility and Teichert rentals, in the current year is for combined \$57,000. As the mid-point the base level rental is therefore established at \$52,900.

NSCAD has rented out spaces to community groups that have an association with NSCAD and so rent has not been charged for the use of those spaces. In the context of a co-location with AGNS, we have assumed there will be some revenue generated to NSCAD for periodic rental of its theatre and classrooms.

The primary rental space to be available in the AGNS, whether as a stand-alone or co-location, is a 4,000 sq. ft. multi-purpose Reception Hall assumed to provide waterfront views and to allow for seated events of up to 250 and receptions of up to 400, and also available for educational and public programming. The other main AGNS-owned space available for rental is the 2,000 sq. ft. central lobby. The NSCAD-owned spaces available for rental include the 200 seat theatre and various classrooms. Although the various spaces are to be owned by either AGNS or NSCAD they are to be made available to the other institution on a barter basis in the spirit of collaboration.

The projection of revenue to be derived from facility rentals primarily by the AGNS is informed by common experience that art galleries/museums are the most successful type of cultural institution in being selected for corporate and other functions and weddings. And often because of their “classy” nature they are able to charge more than similar sized venues. However, competition in Halifax has been increasing with, for example, the expansion of Pier 21 and the opening of the new Halifax Public Library. On the other hand, the new AGNS is assumed to be designed to maximize rentals business and should become a preferred rentals venue in the area given not only that it is an art gallery but also because of the waterfront site and the size and quality of the rentals spaces assumed.

It is also assumed that the AGNS will receive a commission on catering with a preferred caterer assumed to be at a higher level than the present arrangement. Moreover, although the financial arrangement with the Teichert Gallery art sales and rentals is subject to negotiation at a better site and a new facility, we have estimated a rent of \$25,000 per year compared to the current \$18,000.

Our estimates regarding rentals income to be generated by the AGNS are based on earlier interviews conducted and the experience of other art galleries/museums to indicate 75 major rentals per year starting in Year 1, and growing modestly over time. We estimate net average income of \$2,000 per rental in Year 1, including a commission on catering, with income increasing by 2% above inflation per year. We also estimate smaller rentals of the lobby and other spaces at 30% of the income from major rentals and the revenue from rental of space for the Teichert Art Sales and rentals. No difference is estimated in the stand-alone vs. co-location scenario,

Regarding NSCAD, one of the advantages of the co-location to the waterfront is that it will allow for a smaller building and therefore lower building occupancy costs. In the current Fountain and Academy facilities there is excess space that is leased out to various tenants. That will not be possible in the smaller new facility and NSCAD will therefore no longer be able to generate the \$500,000 generated in FY2016. The rent that will be achievable for NSCAD will be from its theatre and classroom facilities. However, it is understood that the large majority of uses of its theatre/ auditorium and classrooms will be internal or used by organizations with a link to NSCAD. On the other hand, in the context of a building complex that will be strongly oriented to facility rentals, it is assumed there will be some users interested in an auditorium/theatre space and some interested in classrooms and that these will be made available with the relatively modest revenue from them allocated to NSCAD.

These estimates and assumptions lead to the following projections.

| Facility Rentals | | AGNS Stand-Alone Scenario | | | AGNS/NSCAD Co-Location Scenario | | |
|---|------------------|---------------------------|------------------|------------------|---------------------------------|------------------|------------------|
| Art Gallery of Nova Scotia | Base Level | Year 1 | Year 2 | Year 3 | Year 1 | Year 2 | Year 3 |
| Major Rentals per Year | | 75 | 77 | 80 | 75 | 77 | 80 |
| Average Net Income per Major Rental | | \$2,000 | \$2,040 | \$2,081 | \$2,000 | \$2,040 | \$2,081 |
| Total Revenue from Major Rentals | | \$150,000 | \$157,080 | \$166,464 | \$150,000 | \$157,080 | \$166,464 |
| Income from Smaller Rentals | | \$45,000 | \$47,124 | \$49,939 | \$45,000 | \$62,832 | \$66,586 |
| Income from Teichert Sales and Rentals | | \$25,000 | \$25,000 | \$25,000 | \$25,000 | \$25,000 | \$25,000 |
| Total Combined Revenues | \$52,900 | \$220,000 | \$229,204 | \$241,403 | \$220,000 | \$244,912 | \$258,050 |
| Nova Scotia College of Art and Design | | Year 1 | Year 2 | Year 3 | Year 1 | Year 2 | Year 3 |
| External Tenants | \$500,000 | | | | \$0 | \$0 | \$0 |
| Theatre Rentals | | | | | 25 | 28 | 30 |
| Avg. per Rental | | | | | \$500 | \$505 | \$510 |
| Total Revenue from Theatre Rentals | | | | | \$12,500 | \$14,140 | \$15,300 |
| Revenue from Classroom Rentals | | | | | \$500 | \$600 | \$700 |
| Total Revenues | \$500,000 | | | | \$13,000 | \$14,740 | \$16,000 |

5.2.6 PUBLIC AND EDUCATIONAL PROGRAMS/EXTENDED STUDIES - AGNS AND NSCAD

Public and educational programs are already the primary earned income source for the AGNS, accounting for about \$84,000 in FY2016 with about \$93,500 budgeted in the current year. The mid-point base level is therefore about \$88,800. Much of the revenue is from March Break, summer and PD day programs. Similar programs at NSCAD are shown in the Extended Studies projections below.

Whether as a stand-alone or co-located it has been assumed that there will be an increased variety of art classes and workshops for all age and skill levels at the AGNS, including more registered programs. And it has been assumed that there will be increased programming on Thursday evenings. The AGNS school program revenues are in addition to the admissions revenue received from charged school group visits.

Gross income that may be earned from new or expanded public and educational programs may vary widely depending on the specific programs to be implemented. Our estimates of revenues from public and educational programs are that they will double from the FY2016 level in the stand-alone scenario, and grow by 2% per year above the prevailing rate of inflation to reflect better market knowledge over time. We estimate the same 5% higher revenue increment for revenue from public and educational programs as attendance levels attributable to the co-location with NSCAD.

The NSCAD School of Extended Studies includes adult and youth programs, including March Break and other camps. The revenues generated from these programs totaled about \$312,500 in FY2016. The impact of a new waterfront location, with better quality facilities and enhanced programs should not only help to boost tuition levels and income, as discussed below, it should also help to increase interest levels and revenues from extended studies.

Although the additional amounts may vary widely based on specific programs to be introduced, we have used the NSCAD estimates of growth in revenue from Extended Studies as follows. This leads to the following projections.

| Public and Educational Programming | | AGNS Stand-Alone Scenario | | | AGNS/NSCAD Co-Location Scenario | | |
|---------------------------------------|------------|---------------------------|-----------|-----------|---------------------------------|-----------|-----------|
| Art Gallery of Nova Scotia | Base Level | Year 1 | Year 2 | Year 3 | Year 1 | Year 2 | Year 3 |
| Total Revenue | \$88,800 | \$177,600 | \$181,152 | \$184,775 | \$186,480 | \$190,210 | \$194,014 |
| Extended Studies | | AGNS Stand-Alone Scenario | | | AGNS/NSCAD Co-Location Scenario | | |
| Nova Scotia College of Art and Design | Base Level | Year 1 | Year 2 | Year 3 | Year 1 | Year 2 | Year 3 |
| Total Revenue | \$312,500 | | | | \$343,750 | \$350,000 | \$360,000 |

5.2.7 FUNDRAISING EVENTS (NET) - AGNS

The AGNS generated net income of about \$76,000 from fundraising events in FY2016 and had no major event in the current year, resulting in net income of \$20,300. The mid-point base level is \$49,200. The revenue from NSCAD fundraisers is allocated within a larger miscellaneous revenue category and therefore considered as part of Other Earned Income below.

The new waterfront location and a much better quality facility should enable an increased emphasis on fundraising events within the new building. This will lower costs and increase the net income achievable. However, it is also assumed that donor fatigue after the capital campaign will limit the funds raised in the opening year of the new AGNS. ***Although the amount generated from the gala and other potential fundraising initiatives may vary widely we have estimated a growth to net income at \$125,000 per year in Years 2 and 3 and \$100,000 in Year 1 to take donor fatigue into account. No difference is estimated in the two scenarios.***

5.2.8 OTHER EARNED/MISCELLANEOUS INCOME - AGNS AND NSCAD

Including touring revenue, the AGNS reported about \$38,300 in other/miscellaneous earned income in FY2016, with \$44,300 budgeted in the current year. The base level is therefore \$41,300. NSCAD reported \$192,300 from a variety of sources including fundraisers. There may be opportunities for other earned income in the context of the new facility for both institutions. We have estimated a relatively modest increase in revenue in the opening year, with growth in subsequent years for both. We do not estimate a difference in revenue for AGNS in the two scenarios.

| Other Earned/Miscellaneous Income | | AGNS Stand-Alone Scenario | | | AGNS/NSCAD Co-Location Scenario | | |
|---------------------------------------|------------|---------------------------|----------|----------|---------------------------------|-----------|-----------|
| Art Gallery of Nova Scotia | Base Level | Year 1 | Year 2 | Year 3 | Year 1 | Year 2 | Year 3 |
| Total Revenue | \$41,300 | \$55,000 | \$60,000 | \$65,000 | \$55,000 | \$60,000 | \$65,000 |
| Nova Scotia College of Art and Design | | AGNS Stand-Alone Scenario | | | AGNS/NSCAD Co-Location Scenario | | |
| Base Level | Year 1 | Year 2 | Year 3 | Year 1 | Year 2 | Year 3 | |
| Total Revenue | \$192,300 | | | | \$200,000 | \$210,000 | \$220,000 |

5.2.9 TUITIONS, STUDENT FEES AND STUDENT MATERIAL FEES - NSCAD

These amounts combined to total \$5,889,500 for NSCAD in FY2016, primarily from tuitions, based on an enrollment of about 650. That translates to an average of about \$9,060 per student. It is assumed that the new site and co-located facility will assist with a growth in enrollment and therefore in tuitions and associated revenues. Based on NSCAD expectations, we estimate a growth in enrollment to 750 in Year 1, 800 in Year 2 and stabilizing at 850 in Year 3. Assuming the same \$9,060 revenue per student leads to the following projections of substantial increases in revenue from these sources.

| Tuition, Student Fees and Material Fees Nova Scotia College of Art and Design Base Level | | AGNS Stand-Alone Scenario | | | AGNS/NSCAD Co-Location Scenario | | |
|---|--------------------|---------------------------|--------|--------|---------------------------------|--------------------|--------------------|
| | | Year 1 | Year 2 | Year 3 | Year 1 | Year 2 | Year 3 |
| Total Enrollment | 650 | | | | 750 | 800 | 850 |
| Average Revenue per Student | \$9,061 | | | | \$9,061 | \$9,061 | \$9,061 |
| Total Revenue | \$5,889,500 | | | | \$6,795,750 | \$7,248,800 | \$7,701,850 |

5.2.10 EXISTING ENDOWMENT INCOME – AGNS

NSCAD has an endowment but does not use it to support operating costs. AGNS reported \$92,500 in endowment income in FY2016, with \$75,000 budgeted in the current year, leading to a base level of about **\$83,800**. We have maintained this level for each year projected to allow the bottom line to be the additional amount required to break even from endowment, government and private sources. Chapter 5.4.1 includes a scenario of substantially increased revenue from the endowment.

5.2.11 EXISTING PRIVATE INCOME – AGNS AND NSCAD

This category for AGNS includes sponsorships, donations, upper level (Circle) memberships, and acquisitions revenue. Amounts have varied substantially on a year by year basis. AGNS advises that an appropriate base level would be the average for the past five years, or **\$521,000**.

For NSCAD, contributed income totaled about **\$28,700** in FY2016.

For the purposes of these projections we have assumed that these base level amounts will continue for each year projected. This allows the bottom line to be the additional or reduced amount required from government, endowment and private sources to break even. Chapter 5.4.1 includes a scenario of increased revenue from private sources.

5.2.12 EXISTING AND ASSUMED GOVERNMENTAL SUPPORT – AGNS AND NSCAD

In FY2016 the AGNS received a combined \$2,544,000 from a combination of provincial and federal sources, largely from the province. The budget for the current year is about \$2,322,000, leading to a mid-point base level of **\$2,433,000**. For the purposes of these projections we have assumed that these amounts will continue for each year projected to allow the bottom line to be the additional or reduced amount required from grant, endowment and private sources to break even.

NSCAD receives operating grants, facilities grants and other grants. Whereas facility grants are assumed to be unchanged the operating and other grants are assumed to increase as shown on the following table

| Existing Government Support | | AGNS Stand-Alone Scenario | | | AGNS/NSCAD Co-Location Scenario | | |
|---------------------------------------|-------------|---------------------------|-------------|-------------|---------------------------------|-------------|-------------|
| Art Gallery of Nova Scotia | Base Level | Year 1 | Year 2 | Year 3 | Year 1 | Year 2 | Year 3 |
| Total Revenue | \$2,433,000 | \$2,433,000 | \$2,433,000 | \$2,433,000 | \$2,433,000 | \$2,433,000 | \$2,433,000 |
| Existing/Assumed Operating Grants | | | | | | | |
| Nova Scotia College of Art and Design | Base Level | Year 1 | Year 2 | Year 3 | Year 1 | Year 2 | Year 3 |
| Total Revenue | \$8,309,000 | | | | \$8,733,000 | \$8,820,000 | \$8,908,000 |
| Existing/Assumed Facilities Grants | | | | | | | |
| Nova Scotia College of Art and Design | Base Level | Year 1 | Year 2 | Year 3 | Year 1 | Year 2 | Year 3 |
| Total Revenue | \$2,279,000 | | | | \$1,142,500 | \$1,142,500 | \$1,142,500 |
| Existing/Assumed Other Grants | | | | | | | |
| Nova Scotia College of Art and Design | Base Level | Year 1 | Year 2 | Year 3 | Year 1 | Year 2 | Year 3 |
| Total Revenue | \$174,000 | | | | \$174,000 | \$190,000 | \$200,000 |

5.3 PROJECTED EXPENSES

The categories of projected operating expenses for the Art Gallery of Nova Scotia (AGNS) and/or the Nova Scotia College of Art and Design (NSCAD) University are:

- Salaries, Wages and Benefits - AGNS and NSCAD
- Building Occupancy Costs - AGNS and NSCAD
- Exhibitions - AGNS
- Educational and Public Programming/Materials – AGNS and NSCAD
- Conservation/Curatorial - AGNS
- General and Administrative – AGNS and NSCAD
- Marketing – AGNS and NSCAD
- Development – AGNS
- Retail Cost of Goods Sold - AGNS and NSCAD
- Other Expenses – AGNS
- Debt Repayment - NSCAD

5.3.1 SALARIES, WAGES AND BENEFITS – AGNS AND NSCAD

The largest operating cost of any cultural or educational institution is staffing. For art galleries/museums staffing costs generally account for 50-65% of the total operating budget. In FY2016 staffing costs at over \$2.1 million accounted for about 58% of the total AGNS operating budget of about \$3.6 million. Staffing costs are budgeted in the current year to be closer to \$2.2 million, with the mid-point base level at \$2,150,000.

For NSCAD, staffing costs at close to \$11.8 million accounted for about 65% of the \$18 million operating budget.

As shown in Chapter 4.8 the new facility is estimated to result in an increased level of staffing for the larger AGNS to result in a growth from 36.2 FTE to 48.7 FTE staff assuming a stand-alone operation or 46.3 FTE if a co-location with NSCAD. For NSCAD the relocation For NSCAD the co-location is expected to result in a very small reduction of 0.6 FTE staff as the benefits of co-location are assumed to allow the filling of unfilled positions.

Given issues of confidentiality we have not shown existing or new salaries. Instead, we have estimated that the average salary/wage and benefit for the additional AGNS staff will be \$65,000 per FTE. Therefore the additional 12.5 FTE staff in the stand-alone scenario would require add about \$813,000 to staffing costs while the 10.1 FTE in the co-location scenario would add about \$657,000 to AGNS staffing costs.

For NSCAD, the assumption is for a reallocating of staff as opposed to reducing them as a consequence of the relocation at opening. However, given an assumed increase in enrollment we have assumed more part-time and contract instructors, maintenance and other personnel. We estimate an increase in staffing costs as a consequence of the increased enrollment combined with the escalation of salaries of primarily unionized faculty and staff for a total of \$500,000 in Year 1, \$600,000 in Year 2 and \$700,000 in Year 3.

Although all revenues and costs are in 2017 constant dollars and staff salaries are subject to negotiation, we have estimated that staffing costs for AGNS will exceed the prevailing rate of inflation by an average of 0.5% per year during the three-year period projected. For the purposes of these projections we have assumed the opening year in mid-2021 and have thus added a 2% increment to account for the time until then. These estimates and assumptions lead to the following staffing costs.

| Staffing Costs | | AGNS Stand-Alone Scenario | | | AGNS/NSCAD Co-Location Scenario | | |
|---|---------------------|---------------------------|--------------------|--------------------|---------------------------------|---------------------|---------------------|
| Art Gallery of Nova Scotia | Base Level | Year 1 | Year 2 | Year 3 | Year 1 | Year 2 | Year 3 |
| Base Level Salaries, Wages and Benefits | \$2,152,000 | \$2,195,040 | \$2,206,015 | \$2,217,045 | \$2,195,040 | \$2,206,015 | \$2,217,045 |
| Additional FTE Positions - Stand Alone Scenario | 12.5 | \$813,000 | \$817,065 | \$821,150 | | | |
| Additional FTE Positions - Co-Location Scenario | 10.1 | | | | \$657,000 | \$660,285 | \$663,586 |
| Total Costs | \$2,152,000 | \$3,008,040 | \$3,023,080 | \$3,038,196 | \$2,852,040 | \$2,866,300 | \$2,880,632 |
| Nova Scotia College of Art and Design | Base Level | Year 1 | Year 2 | Year 3 | Year 1 | Year 2 | Year 3 |
| Total Costs | \$11,792,600 | | | | \$12,528,452 | \$12,691,094 | \$12,854,550 |

5.3.2 OCCUPANCY COSTS – AGNS AND NSCAD

Occupancy costs are defined to include all costs, excluding salaries, associated with building repairs and maintenance, utilities, security systems and building insurance. And in the case of the existing AGNS they include rent and utilities costs associated with off-site collections storage. For NSCAD there is a combination of rent, common area costs and property taxes and other items discussed below. In general, occupancy costs vary by the extent of the environmental controls required, the weather conditions, the extent of public use, and the condition of the building, with a new building requiring lower maintenance and utilities costs.

The existing AGNS is part of a larger office building and so is not fully comparable to occupancy cost data for museums and galleries in their own self-standing buildings. Moreover, most occupancy costs for AGNS are provided in-kind by the Province of Nova Scotia. In FY2016 the occupancy costs paid directly by AGNS totaled a modest \$86,500. This included an allocation for the Yarmouth satellite site. The budget for the current year is only about \$23,900. The mid-point base level is therefore set at \$55,200. At about 67,200 gross sq. ft. of space, this translates to \$0.82 per gross square ft. The benefits of the lower energy and repair costs associated with a new building would accrue to the Province and not directly to AGNS. We have therefore applied the current \$0.82 per gross sq. ft. to the assumed rounded 107,800 gross sq. ft. of space in the stand-alone scenario, resulting in an occupancy cost of about \$88,200 payable by AGNS. In the co-location scenario there is 102,900 gross sq. ft. of space to be owned by AGNS (the Province of Nova Scotia). The total for the co-location scenario is about \$84,100, as summarized in the following table.

For NSCAD, the categories included under building occupancy costs are utilities, rent and common area costs, repairs and maintenance, insurance, facilities renewal, property tax, security and custodial costs. In FY2016 these costs combined to total about \$2,268,500 for all three NSCAD sites. At a combined 270,000 gross square feet, that translates to \$8.40 per sq. ft. However, there are limited building systems at the Fountain and Academy campuses and NSCAD estimates higher costs in the co-located facility to prevent a backlog of deferred maintenance, as now exists in the current facilities. The NSCAD estimates are \$9.40 per gross sq. ft. in Year 1, increasing to \$10.40 by Year 3. These figures are applied to the rounded 97,400 gross sq. ft. of the co-located space assumed to be owned by NSCAD plus the 70,000 Port campus, or a total of 167,400 gross sq. ft. of space.

These assumptions and estimates lead to the following projections, which indicate occupancy cost savings for NSCAD associated with smaller facilities that offset the loss of tenancy rental income.

| Occupancy Costs | Base Level | AGNS Stand-Alone Scenario | | | AGNS/NSCAD Co-Location Scenario | | |
|--|--------------------|---------------------------|-----------------|-----------------|---------------------------------|--------------------|--------------------|
| | | Year 1 | Year 2 | Year 3 | Year 1 | Year 2 | Year 3 |
| Art Gallery of Nova Scotia | | | | | | | |
| Size of Space (gross sq. ft.) | 67,200 | 107,800 | 107,800 | 107,800 | 102,900 | 102,900 | 102,900 |
| Costs Per Sq. Ft. | \$0.82 | \$0.82 | \$0.82 | \$0.82 | \$0.82 | \$0.82 | \$0.82 |
| Total Costs | \$55,200 | \$88,396 | \$88,396 | \$88,396 | \$84,378 | \$84,378 | \$84,378 |
| Nova Scotia College of Art and Design | | | | | | | |
| Size of Space (gross sq. ft.) | 270,000 | | | | 167,400 | 167,400 | 167,400 |
| Costs Per Sq. Ft. | \$8.40 | | | | \$9.40 | \$9.90 | \$10.40 |
| Total Costs | \$2,268,500 | | | | \$1,573,560 | \$1,657,260 | \$1,740,960 |

5.3.3 EXHIBITIONS – AGNS

Non-staff exhibitions expenses associated with permanent and temporary exhibitions vary depending primarily on the nature of the specific exhibitions offered during the course of a year. For the AGNS in FY2016 the total was about \$414,400. In the current year they are budgeted at about \$243,800. The mid-point is \$329,100. For the purposes of these projections we have estimated an increase in the cost of exhibitions partially on the basis of the growth in exhibitions space. The AGNS currently includes about 19,500 net sq. ft. of exhibition space. With a \$329,100 exhibition budget that translates to \$16.88 per square foot. This figure has been increased to \$30.00 per square foot in Year 1 assuming the ability to attract better quality but also higher cost exhibitions and the greater use of technology. We have also assumed an annual increase above the prevailing rate of inflation by 2% per year as applied to the assumed 27,750 net sq. ft. of exhibition space in the stand-alone scenario and 27,250 nsf in the co-location scenario for space owned by AGNS.

The costs associated with exhibitions in the NSCAD Anna Leonowens Gallery are not substantial. This will not change in the new facility as the modest costs would be part of other expense categories.

Our estimates for non-staff costs associated with permanent and temporary exhibitions at AGNS are as follows:

| Exhibition Costs Art Gallery of Nova Scotia | Base Level | AGNS Stand-Alone Scenario | | | AGNS/NSCAD Co-Location Scenario | | |
|--|------------------|---------------------------|------------------|------------------|---------------------------------|------------------|------------------|
| | | Year 1 | Year 2 | Year 3 | Year 1 | Year 2 | Year 3 |
| Size of Space (gross sq. ft.) | 19,500 | 27,750 | 27,750 | 27,750 | 27,250 | 27,250 | 27,250 |
| Costs Per Sq. Ft. | \$16.88 | \$30.00 | \$30.60 | \$31.21 | \$30.00 | \$30.60 | \$31.21 |
| Total Costs | \$329,100 | \$832,500 | \$849,150 | \$866,133 | \$817,500 | \$833,850 | \$850,527 |

5.3.4 EDUCATIONAL AND PUBLIC PROGRAMMING/MATERIALS – AGNS AND NSCAD

These costs include those expenses, exclusive of staff salaries, associated with a variety of educational and public programs to be offered in the relocated, expanded and enhanced AGNS. These expenses cover a wide range of items specific to the nature of each program. In FY2016 the AGNS incurred about \$95,000 in direct, non-staff expenses associated with educational and public programming. The budget for the current year is about \$103,600, resulting in a mid-point of \$99,300. With a base level revenue figure of about \$88,800 this indicates programming costs that exceeded revenues by about 12%, when staff are excluded.

Assuming a strong emphasis on studio courses, workshops and other charged public programs, the revenue generation potential of the AGNS should be higher than is currently the case. This is reflected in the revenue projections. On the other hand there will be more public and educational programs that will generate no income at all given the educational mission and mandate of the AGNS and efforts to widen access and attendance including a half-price rather than free admission policy on Thursday evenings. We have therefore estimated that, exclusive of staff salaries, the direct operating costs associated with public and educational programs will be 20% higher than the projected revenues. This leads to the following projections, with slightly higher costs associated with the co-location scenario that reflect the similarly higher revenues projected.

For NSCAD these costs have been defined to include instructional materials, library costs and financial aid to students and totaled about \$269,000 in FY2016. Assuming higher enrollment and a greater focus on extended studies there will need to be a larger allocation for instructional materials and likely more financial aid to students. For the purposes of these projections, we estimate that the increased costs will also be will be about 20% higher than the projected revenues. This leads to the following projections.

| Programming Costs | Base Level | AGNS Stand-Alone Scenario | | | AGNS/NSCAD Co-Location Scenario | | |
|---------------------------------------|------------|---------------------------|-----------|-----------|---------------------------------|-----------|-----------|
| | | Year 1 | Year 2 | Year 3 | Year 1 | Year 2 | Year 3 |
| Art Gallery of Nova Scotia | | | | | | | |
| Total Costs | \$99,300 | \$213,120 | \$217,382 | \$221,730 | \$223,776 | \$228,252 | \$232,817 |
| Nova Scotia College of Art and Design | | | | | | | |
| Total Costs | \$269,000 | | | | \$412,500 | \$420,000 | \$432,000 |

5.3.5 CONSERVATION/COLLECTIONS CARE - AGNS

Collections care expenses include such items as conservation, storage, collection handling supplies and equipment, and photography. The AGNS allocated close to \$143,700 in FY2016 with close to \$141,600 budgeted in the current year, and therefore a base level of about \$142,600. It is likely that collections care costs will increase associated with new demands for conservation as the collection is relied upon more heavily for exhibitions and that costs will increase over time. On this basis we estimate collections care expenses to be as follows, with no difference projected in the stand-alone and co-location scenarios.

| Collections Care Costs | Base Level | AGNS Stand-Alone Scenario | | | AGNS/NSCAD Co-Location Scenario | | |
|----------------------------|------------|---------------------------|-----------|-----------|---------------------------------|-----------|-----------|
| | | Year 1 | Year 2 | Year 3 | Year 1 | Year 2 | Year 3 |
| Art Gallery of Nova Scotia | | | | | | | |
| Total Costs | \$142,600 | \$180,000 | \$185,000 | \$190,000 | \$180,000 | \$185,000 | \$190,000 |

5.3.6 GENERAL AND ADMINISTRATIVE – AGNS AND NSCAD

The definition of what is included in a general and administrative category varies by institution and generally includes office and related supplies, equipment, mailing, printing, telephone, travel, conferences, volunteer perquisites, professional services, dues and subscriptions, bank charges and credit card fees, entertainment, and items that do not fit into the other expense categories.

For AGNS, excluding one-time costs, these costs totaled about \$231,800 in FY2016 with about the same amount budgeted in the current year. For NSCAD, general and administrative costs totaled about \$1,485,500.

General and administrative costs are very closely related to staffing levels and vary depending on how an institution allocates its operating expenses. The range is often 10-20% of staffing costs but can vary in both directions. In FY2016 general and administrative costs were about 11% of the staffing costs of AGNS. For the purposes of these projections we have estimated Year 1 general and administrative costs at 13% of staffing costs to take initial purchases and other extraordinary costs into account, with 12% assumed in subsequent years.

For NSCAD the general and administrative costs were about 13% of staffing costs in FY2016. For the purposes of these projections we have estimated that the growth in enrollment will lead to higher general and administrative costs estimated at 15% of staffing costs in Year 1, 16 in Year 2 and 17% in Year 3.

These assumptions and estimates result in the following projections.

| General and Administrative Costs | Base Level | AGNS Stand-Alone Scenario | | | AGNS/NSCAD Co-Location Scenario | | |
|--|-------------|---------------------------|-----------|-----------|---------------------------------|-------------|-------------|
| | | Year 1 | Year 2 | Year 3 | Year 1 | Year 2 | Year 3 |
| Art Gallery of Nova Scotia | | | | | | | |
| Total Costs | \$231,800 | \$391,045 | \$362,770 | \$364,583 | \$370,765 | \$343,956 | \$345,676 |
| Nova Scotia College of Art and Design | | | | | | | |
| Total Costs | \$1,485,500 | | | | \$1,879,268 | \$2,030,575 | \$2,185,273 |

5.3.7 MARKETING – AGNS AND NSCAD

Marketing staff has been accounted for in the staffing projections. The focus here is on non-staff marketing costs, including advertising and promotion and associated materials.

The AGNS allocated about \$78,900 to these costs in FY2016, with \$67,100 budgeted in the current year, leading to a base level of \$73,000. At 37,000 base level visitors this translates to \$1.97 per visitor. For context, the median figure of US art museums is \$2.15 per visitor. Taking into account a general trend to declining marketing expenditures with an increased emphasis on lower cost social media balanced against the need for a more substantial marketing budget, our estimate of marketing costs is based on non-staff expenditures of \$1.80 per visitor, with an allocation of \$2.00 in Year 1 to reflect a grand opening celebration. Tying marketing expenditures to attendance levels there is a slight increase in these costs for the co-location scenario.

For NSCAD, without a significant need to attract the general public to exhibitions, marketing expenditures were relatively low at about \$84,100. Given an objective of increased enrollment associated with the new facility, and enhanced public relations, NSCAD estimates the need for an increase in marketing expenditures to grow from \$150,000 in the opening year to \$260,000 by Year 3.

These estimates and assumptions lead to the following projections of marketing expenditures for both AGNS and NSCAD as follows.

| Marketing Costs Art Gallery of Nova Scotia | Base Level | AGNS Stand-Alone Scenario | | | AGNS/NSCAD Co-Location Scenario | | |
|---|------------|---------------------------|-----------|-----------|---------------------------------|-----------|-----------|
| | | Year 1 | Year 2 | Year 3 | Year 1 | Year 2 | Year 3 |
| Total Costs | \$73,300 | \$210,000 | \$171,000 | \$162,000 | \$220,000 | \$180,000 | \$171,000 |
| Nova Scotia College of Art and Design | Base Level | AGNS Stand-Alone Scenario | | | AGNS/NSCAD Co-Location Scenario | | |
| | | Year 1 | Year 2 | Year 3 | Year 1 | Year 2 | Year 3 |
| Total Costs | \$84,100 | | | | \$150,000 | \$225,000 | \$260,000 |

5.3.8 DEVELOPMENT – AGNS

NSCAD development costs are included as part of the General and Administrative and Other Expenses categories. The AGNS reported an allocation for development/fundraising and special event-related expenses at about \$24,000 in FY2016, with about \$89,800 budgeted in the current year. The mid-point base level is therefore about \$56,900.

With needed increased revenues from Private Sources and Fundraising events the allocation of costs associated with Development will need to increase as well. For the purposes of these projections we estimate that the amount will double on a rounded basis from the base level in Year 1 and increase modestly each year, with no difference in the stand-alone or co-location scenarios. This results in the following projections.

| Development Costs Art Gallery of Nova Scotia | Base Level | AGNS Stand-Alone Scenario | | | AGNS/NSCAD Co-Location Scenario | | |
|---|------------|---------------------------|-----------|-----------|---------------------------------|-----------|-----------|
| | | Year 1 | Year 2 | Year 3 | Year 1 | Year 2 | Year 3 |
| Total Costs | \$56,900 | \$115,000 | \$120,000 | \$125,000 | \$115,000 | \$120,000 | \$125,000 |

5.3.9 RETAIL COST OF GOODS SOLD – AGNS AND NSCAD

The cost of retail goods sold is generally in the range of 50-60% of retail sales. For the AGNS they were about \$146,300 in FY2016 and budgeted at \$145,100 in the current year, resulting in a base level of \$145,700. These exceed the revenues generated, but that is considered an anomaly. These projections assume cost of goods sold will be at 60% each year.

For NSCAD, the cost of goods sold in FY2016 was about \$207,500, or about 69% of the \$300,000 in gross sales. We estimate that these costs will decline to 60% in the co-located facility. This leads to the following projections.

| Retail Cost of Goods Sold Art Gallery of Nova Scotia | Base Level | AGNS Stand-Alone Scenario | | | AGNS/NSCAD Co-Location Scenario | | |
|---|------------|---------------------------|-----------|-----------|---------------------------------|-----------|-----------|
| | | Year 1 | Year 2 | Year 3 | Year 1 | Year 2 | Year 3 |
| Total Costs | \$145,700 | \$204,750 | \$188,100 | \$180,900 | \$207,900 | \$192,000 | \$185,250 |
| Nova Scotia College of Art and Design | Base Level | AGNS Stand-Alone Scenario | | | AGNS/NSCAD Co-Location Scenario | | |
| | | Year 1 | Year 2 | Year 3 | Year 1 | Year 2 | Year 3 |
| Total Costs | \$207,500 | | | | \$79,200 | \$75,000 | \$74,100 |

5.3.10 OTHER EXPENSES - AGNS

Both AGNS and NSCAD have expenses that do not fit into the expense categories above. For AGNS they include acquisitions and amortization costs. Acquisitions vary on a year by year basis with an average of about \$181,000 over the past five years. The appropriate base level cost for amortization is advised by the AGNS to be \$50,000 per year. These figures have been used for each year projected plus about \$2,000 in other expenses and therefore **\$233,000 each year**, with no change in both scenarios.

5.3.11 DEBT REPAYMENT - NSCAD

There are two operating costs associated with debt repayment. One is close to \$1.4 million for the Fountain Campus, which would no longer exist with its sale. The current Port debt is projected to remain at the **\$766,200** level for each of the three years projected.

5.4 SUMMARY OF ATTENDANCE AND FINANCIAL PROJECTIONS

Two summary tables follow. The first focuses on projected attendance, operating revenues and expenses for the Art Gallery of Nova Scotia (AGNS) in its opening three years of operation. The projections are in two scenarios. One assumes that AGNS is a stand-alone institution on the Salter Block site, the other assumes a colocation with NSCAD on the same site. The second table summarizes the operating revenue and expense projections for NSCAD assuming the co-location with AGNS.

5.4.1 ART GALLERY OF NOVA SCOTIA

For AGNS, the annual attendance levels are estimated to be about 90,000 in the stabilized Year 3 assuming the stand-alone scenario, and 95,000 assuming a co-location with NSCAD, with the difference in large part because of the easier access by NSCAD students. This may be compared to the 37,000 current visitor range. Year 1 attendance is projected at 105,000 and 110,000, respectively, with a normal decline in the subsequent years.

The total annual operating budget, in 2017 dollars, is estimated to be in the range of \$5.5 million in the stand-alone scenario, compared to the FY2016 base level operating budget of about \$3.6 million. Operating expenses are estimated to be lower by over \$200,000 per year assuming the staffing and other efficiencies and economies of the co-location scenario. The additional operating revenues attributable to the co-location are not substantial because the additional attendance is largely from free admission and relatively low-spending NSCAD students.

Not surprisingly, the additional staff and other operating costs associated with a larger and enhanced AGNS facility exceed the additional revenues that may be generated on the waterfront Salter Block site. Accordingly **the additional amount that will be required from a combination of government, endowment and private sources will be in the range of \$808,000 to \$872,000 in the stand-alone scenario and \$586,000 to \$637,000 assuming the co-location with NSCAD. On balance the financial benefit to the AGNS of a co-location with NSCAD ranges from about \$216,000 to \$235,000.**

Although the financial benefit to the AGNS is not substantial in the context of its overall operating budget, potentially very substantial are the synergies and benefits associated with the co-location. As jointly stated by the CEO of AGNS and the President of NSCAD: “The co-location of two significant provincial arts institutions has the potential to concentrate specialized facilities and technical expertise in world-class, custom-built facilities which serve to maximize the potential impact of local, provincial, and national investments. The AGNS and NSCAD co-location reveals the values and passion that drive contemporary arts research and creative practice: social innovation, environmental sustainability, technological advancement, social justice and community building with sensitivity to the transformative power of the creative imagination and human potential. The possibilities for innovation are far greater when the two institutions work together.”

5.4.2 NOVA SCOTIA COLLEGE OF ART AND DESIGN UNIVERSITY

The core assumption that influences the revenue and expense projections for NSCAD is that the co-location on the waterfront Salter Block site will lead to increased enrollment and therefore tuition and associated revenue that will exceed the additional costs associated with the enrollment growth. Another other major impact on the projections for NSCAD is a substantial enhancement in space efficiency and the reduced occupancy costs in the co-location relative to the energy inefficiency and high maintenance costs associated with the current Fountain and Academy campuses. By locating to a new campus NSCAD will be in a fully accessible building and will be in full compliance with the pending Bill 59. The net impact is an **operating surplus in the range of \$174,000 to \$387,000 per year**.

It must be recognized that the increased enrollment and elimination of the Fountain Campus debt would be applicable in any relocation scenario for NSCAD assuming no new capital debt at a new site. As with AGNS, the benefits of co-location are less financial than they are about the synergies that result from the two institutions sharing the same site.

| Summary of Projections (rounded) | Base Level | Year 1 | Year 2 | Year 3 | Year 1 | Year 2 | Year 3 | Base Level | Year 3% | Year 3% |
|--|---------------------------|--------------------|--------------------|---------------------------------|--------------------|--------------------|--------------------|---------------|---------------|---------------|
| Art Gallery of Nova Scotia | AGNS Stand-Alone Scenario | | | AGNS/NSCAD Co-Location Scenario | | | Base Level | Stand Alone | Co- Located | |
| Total Attendance | 37,000 | 105,000 | 95,000 | 90,000 | 110,000 | 100,000 | 95,000 | | | |
| Revenues | | | | | | | | | | |
| Admissions | \$103,300 | \$574,324 | \$519,626 | \$492,278 | \$601,673 | \$546,975 | \$519,626 | 2.9% | 9.0% | 9.8% |
| Retail Sales | \$129,200 | \$341,250 | \$313,500 | \$301,500 | \$346,500 | \$320,000 | \$308,750 | 3.7% | 5.5% | 5.8% |
| Paid Memberships | \$48,000 | \$132,000 | \$123,420 | \$120,166 | \$134,750 | \$126,225 | \$123,027 | 1.4% | 2.2% | 2.3% |
| Café Concession | \$18,000 | \$30,000 | \$30,000 | \$30,000 | \$30,000 | \$30,000 | \$30,000 | 0.5% | 0.5% | 0.6% |
| Facility Rentals | \$52,900 | \$220,000 | \$229,204 | \$241,403 | \$220,000 | \$244,912 | \$258,050 | 1.5% | 4.4% | 4.9% |
| Public and Educational Programs | \$88,800 | \$177,600 | \$181,152 | \$184,775 | \$186,480 | \$190,210 | \$194,014 | 2.5% | 3.4% | 3.7% |
| Fundraising Events (net) | \$49,200 | \$100,000 | \$125,000 | \$125,000 | \$100,000 | \$125,000 | \$125,000 | 1.4% | 2.3% | 2.4% |
| Other Earned/Miscellaneous | \$41,300 | \$55,000 | \$60,000 | \$65,000 | \$55,000 | \$60,000 | \$65,000 | 1.2% | 1.2% | 1.2% |
| Existing Endowment Income | \$83,800 | \$83,800 | \$83,800 | \$83,800 | \$83,800 | \$83,800 | \$83,800 | 2.4% | 1.5% | 1.6% |
| Existing Private Support | \$521,000 | \$521,000 | \$521,000 | \$521,000 | \$521,000 | \$521,000 | \$521,000 | 14.8% | 9.5% | 9.8% |
| Existing Governmental Support | \$2,433,000 | \$2,433,000 | \$2,433,000 | \$2,433,000 | \$2,433,000 | \$2,433,000 | \$2,433,000 | 69.1% | 44.5% | 45.9% |
| Total Revenue | \$3,568,500 | \$4,667,974 | \$4,619,702 | \$4,597,922 | \$4,712,203 | \$4,681,122 | \$4,661,267 | 101.4% | 85.2% | 85.0% |
| Expenses | | | | | | | | | | |
| Salaries, Wages, Benefits | \$2,152,000 | \$3,008,040 | \$3,023,080 | \$3,038,196 | \$2,852,040 | \$2,866,300 | \$2,880,632 | 61.2% | 55.5% | 54.4% |
| Occupancy | \$55,200 | \$88,396 | \$88,396 | \$88,396 | \$84,378 | \$84,378 | \$84,378 | 1.6% | 1.6% | 1.6% |
| Exhibitions | \$329,100 | \$832,500 | \$849,150 | \$866,133 | \$817,500 | \$833,850 | \$850,527 | 9.4% | 15.8% | 16.1% |
| Programs | \$99,300 | \$213,120 | \$217,382 | \$221,730 | \$223,776 | \$228,252 | \$232,817 | 2.8% | 4.1% | 4.4% |
| Conservation/Collections Care | \$142,600 | \$180,000 | \$185,000 | \$190,000 | \$180,000 | \$185,000 | \$190,000 | 4.1% | 3.5% | 3.6% |
| General & Administrative | \$231,800 | \$391,045 | \$362,770 | \$364,583 | \$370,765 | \$343,956 | \$345,676 | 6.6% | 6.7% | 6.5% |
| Marketing | \$73,300 | \$210,000 | \$171,000 | \$162,000 | \$220,000 | \$180,000 | \$171,000 | 2.1% | 3.0% | 3.2% |
| Development | \$56,900 | \$115,000 | \$120,000 | \$125,000 | \$115,000 | \$120,000 | \$125,000 | 1.6% | 2.3% | 2.4% |
| Retail Cost of Goods Sold | \$145,700 | \$204,750 | \$188,100 | \$180,900 | \$207,900 | \$192,000 | \$185,250 | 4.1% | 3.3% | 3.5% |
| Other Expenses | \$233,000 | \$233,000 | \$233,000 | \$233,000 | \$233,000 | \$233,000 | \$233,000 | 6.6% | 4.3% | 4.4% |
| Total Expenses | \$3,518,900 | \$5,475,851 | \$5,437,878 | \$5,469,938 | \$5,304,359 | \$5,266,736 | \$5,298,279 | 100.0% | 100.0% | 100.0% |
| Additional Amount Required from Endowment, Private and Government Sources to Break Even | \$49,600 | (\$807,877) | (\$818,176) | (\$872,016) | (\$592,157) | (\$585,614) | (\$637,012) | 1.4% | -14.8% | -15.0% |

| Summary of Projections (rounded) | Base Level | Year 1 | Year 2 | Year 3 | | Year 3 % |
|---------------------------------------|---------------------------------|---------------------|---------------------|---------------------|---------------|---------------|
| Nova Scotia College of Art and Design | AGNS/NSCAD Co-Location Scenario | | | | Base Level | Co-Located |
| Revenues | | | | | | |
| Retail Sales | \$325,000 | \$132,000 | \$125,000 | \$123,500 | 1.8% | 0.7% |
| Facility Rentals | \$500,000 | \$13,000 | \$14,740 | \$16,000 | 2.8% | 0.1% |
| Extended Studies | \$312,500 | \$343,750 | \$350,000 | \$360,000 | 1.7% | 2.0% |
| Other Earned/Miscellaneous | \$192,300 | \$200,000 | \$210,000 | \$220,000 | 1.1% | 1.2% |
| Tuition, Student Fees | \$5,889,500 | \$6,795,750 | \$7,248,800 | \$7,701,850 | 32.7% | 42.1% |
| Existing/Assumed Private Support | \$28,700 | \$28,700 | \$28,700 | \$28,700 | 0.2% | 0.2% |
| Existing/Assumed Operating Grant | \$8,309,000 | \$8,733,000 | \$8,820,000 | \$8,908,000 | 46.1% | 48.6% |
| Existing/Assumed Facility Grant | \$2,279,000 | \$1,142,500 | \$1,142,500 | \$1,142,500 | 12.7% | 6.2% |
| Existing/Assumed Other Grants | \$174,000 | \$174,000 | \$190,000 | \$200,000 | 1.0% | 1.1% |
| Total Revenue | \$18,010,000 | \$17,562,700 | \$18,129,740 | \$18,700,550 | 100.0% | 102.1% |
| Expenses | | | | | | |
| Salaries, Wages, Benefits | \$11,792,600 | \$12,528,452 | \$12,691,094 | \$12,854,550 | 65.5% | 70.2% |
| Occupancy | \$2,268,500 | \$1,573,560 | \$1,657,260 | \$1,740,960 | 12.6% | 9.5% |
| Programs | \$269,000 | \$412,500 | \$420,000 | \$432,000 | 1.5% | 2.4% |
| General & Administrative | \$1,485,500 | \$1,879,268 | \$2,030,575 | \$2,185,273 | 8.2% | 11.9% |
| Marketing | \$84,100 | \$150,000 | \$225,000 | \$260,000 | 0.5% | 1.4% |
| Retail Cost of Goods Sold | \$207,500 | \$79,200 | \$75,000 | \$74,100 | 1.2% | 0.4% |
| Port Debt Repayment | \$766,200 | \$766,200 | \$766,200 | \$766,200 | 4.3% | 4.2% |
| Fountain Debt Repayment | \$1,136,600 | \$0 | \$0 | \$0 | 6.3% | 0.0% |
| Total Expenses | \$18,010,000 | \$17,389,180 | \$17,865,129 | \$18,313,083 | 100.0% | 100.0% |
| Operational Surplus | \$0 | \$173,520 | \$264,611 | \$387,467 | | |

APPENDIX A: DETAILED DATA REGARDING SELECTED ART MUSEUM/ART SCHOOL CO-LOCATIONS

A.1 HISTORY & RELATIONSHIP

- **Art Institute of Chicago (AIC) and the School of the Art Institute of Chicago (SAIC)** can trace its history to an art students' cooperative founded in 1866, which then grew into the museum (founded 1879) and school. However, as both institutions have grown considerably overtime, their current scale and unique missions, means that there is much less sharing of facilities and staff than in the past.
- **The Museum of Fine Art (MFA) in Boston was established in 1870 and the School of the Museum of Fine Art (SMFA) in 1876.** Until recently, the two institutions had a single governance. However, in 2015 MFA signed a memorandum of understanding with Tufts University to transfer SMFA. Under the agreement, Tufts assumed operational responsibility for the school, however the building remains under MFA ownership. The MFA director has said that the decision to transfer the SMFA to Tufts was a strategic move for the school, which has struggled financially amid low enrollment numbers and a lack of full accreditation. SMFA and Tufts have enjoyed a 70-year partnership and affords Tufts with the opportunity to acquire a highly developed arts program. SMFA will be integrated into Tuft's administrative structure.
- **Founded in 1805, Pennsylvania Academy of Fine Art (PAFA)** is the oldest art museum and school in the nation. PAFA has one mission rather than separate institutional statements for the museum and school. Partnership mentality has always been part of the DNA of the institution from the beginning and staff understand and see that the positive synergies of working together outweigh any negatives that might arise.

- **The Rhode Island School of Design** was established in 1877 and the provision of a museum was outlined in the school's founding documents. The RISD Museum is unique from the other museums in that it is very much seen as the Rhode Island state museum. RISD has had a long, checkered past. In the 1980s, the museum curatorial committee became too powerful due to its ability to raise more funds than the school and began to overstep its mandate, thinking it could influence wider school operations. This resulted in a diminishing and ostracizing of the role of Museum Director from the overall school governance. Recently, the museum has seen a turnover of 4 directors in the last 5 years. This has been predominantly due to a polarized difference in opinion on who the museum is for – students or the community? Another recent change in leadership – both the President and Museum Director – has ushered in yet a new era for the institution where both now understand the value of each other and are willing to work in symbiotic partnership.

Conclusion: Historically, the relationship between art schools and museums have been established together at the same. These relationships have grown and evolved over time, waxing and waning as one becomes more influential and prominent than the other and vice versa. The success of these relationships is entirely based on a mutual recognition of the symbiotic and beneficial relationship of the two. MFA/SMFA present an example of when the financial viability of one diminishes to a point that is no longer sustainable for the other. AIC/SAIC present an important example of when both school and museum become too successful and reach a scale where complete integration is no longer needed.

A.2 PHYSICAL PROXIMITY AND SPACE SHARING

- AIC is comprised of 2 interconnected buildings – the original (2) Beaux Art building (562,000 sq ft) and a (3) modern expansion (264,000 sq ft) which opened 2009. SAIC's downtown campus consists of 6 academic buildings and 4 other residential buildings located in the immediate vicinity of the AIC building. The (1) 280 Columbus Drive building (120,364 sq ft) dating from 1979 is the only building conjoined with the AIC contemporary extension. Students are able to move freely between 280 Columbus and the museum through an internal access point. Both parties share loading docks and mechanical equipment which have individual usage meters attached. SAIC has shared use of the Rubloff Auditorium, as is able to use the collection, historic library and archive, and event spaces to host SAIC orientation sessions, graduation ceremonies and galas.



- MFA and SMFA occupy two separate but adjacent buildings which can be accessed across Museum Road. The museum has undergone several expansions over its history and now comprises approximately 616,937 sq ft. The SMFA also underwent expansion in 1987 and now comprises 45,000 sq ft. It is unclear from public sources the extent to which spaces are shared between the two buildings. SMFA students have free access to museum collections and exhibitions, as well as the Morse Study Room where works on paper not currently on view can be examined up close. Students often benefit from invitations to concerts, films and special events.



- PAFA – museum and school – were originally located together in a single building called the Furness Hewitt Building (or the Landmark Building) which was built in 1896. In 2002, Dorrance H. Hamilton made a large donation to PAFA that allowed it to purchase the former federal building and automobile factory immediately adjacent. Both buildings are located on the west side of N Broad St, separated by a pedestrianized portion of Cherry St. The Furness Hewitt Building displays the museum collection for the public and also includes classrooms, an auditorium, and offices. The Hamilton building (240,000 sq ft over 10.5 floors) includes student display galleries on the first 2 floors, classrooms, studios, and offices.
- RISD campus is located on College Hill and is made up of 61 buildings. It is also contiguous with the Brown University Campus. The RISD Museum is located in the heart of the campus and is comprised of 5 interconnected buildings: Waterman Building (57), Pendleton House (44), Radeke Building (50), Farago Wing (29), and Chace Center (17) for a total net assignable space 72,056 sq ft. The Chace Centre is a 5 storey complex that was opened in 2008 and provided the museum with a downtown-facing entrance. The centre includes a main floor lobby, gift shop and Metcalf auditorium shared between museum and school. The rest of the building includes a student gallery, object classrooms, a conservation lab, and first year student studios for the school, as well as a special exhibitions museum gallery (6,000 sq ft), storage for the works on paper collections, and curatorial offices.



Conclusion: The AGNS and NSCAD co-location between a separate art and educational institution is a ground-breaking concept. All of those interviewed were asked about examples that would be comparable to the AGNS/NSCAD co-location but none could think of anything of substantial comparability. The four institutions provide distinctly different options for co-location, fully integrated like PAFA (although the school outgrew this building and expanded into another adjacent building), entirely separate buildings like MFA/SMFA, and semi-integrated buildings such as AIC/SAIC and RISD which benefit from adjacencies, connectivity and partially integrated facilities. Shared facilities are typically those that are needed by both but are too large to maintain and program independently such as auditorium space. A centralized booking calendar and a regular schedule of annually occurring events seems to make the sharing process easier.

A.3 OPERATIONAL SHARING

- AIC and SAIC have several centralized services including human resources; accounting, payroll, accounts payable; IT infrastructure; the legal office (shared 50/50, 4 attorneys on staff) and the CFO who often looks after large capital projects, issuing bonds, etc. The AIC and the SAIC issue a joint annual report. There is some cross-over of AIC curators who also teach art history. Some joint shows are held occasionally as teaching staff also include artists. AIC and SAIC have historically been comingled from the institutions founding.
- SMFA has now been integrated into Tuft's administrative structure. It is unclear from public information sources whether there continues to be any shared operations. However, it is known that the SMFA community has access to the MFA's curatorial and conservation staff, and students have opportunities to intern or assist with installations. Internationally acclaimed artists visiting the MFA frequently make exclusive trips to the SMFA to meet, lecture, and work with SMFA students and faculty.
- A single Board of Trustees and the President oversee all PAFA governance and operations. The President is supported by the Museum Director and the Dean of the School who monitor their respective operations. Central services between the museum and school include marketing, development, finance, human resources, and security (The Director of Security is also in charge of events management). There is not a great deal of crossover with teaching staff and curatorial staff. The faculty curate school gallery spaces and the curatorial staff (3) curate museum gallery spaces. Faculty staff sit on exhibitions committee and the collection committee.
- RISD has a number of centralized services including human resources; accounting, and facilities management. There is very little crossover between teaching staff and curators. Curators are always accessible to students, however only rarely do they teach courses, as faculty union rules prohibit museum staff from joining. The museum also tries to maintain tight boundaries on exhibition planning and museum operations so that faculty staff do not think they have curatorial powers. The museum registrar oversees intake/insurance for the faculty biennial event. The high turnover in leadership has really taken its toll on RISD, particularly on staff morale, reputation, status amongst peers. These problems have really set RISD back. Only now is the governance structure being changed again so that the Museum Director role is reinstated in the President's cabinet along with the other VPs. The museum board is only philanthropic and provides some advice on exhibition plans.

Conclusion: Most institutions have centralized services such as human resource and, accounting. Those activities that are not required on a regular basis. Most students seem to benefit from direct access to curatorial staff, but union regulations may limit the amount of cross-staffing for faculty teaching positions.

A.4 FUTURE PLANS

- PAFA has just built a 300 sq ft glazed artist studio within the museum on the main floor – this initiative puts the school mission on show for everyone to see and elevates the school's presence with visitors. They are also working to build a shared auditorium. The \$25 million capital campaign for infrastructure is ongoing and will be opened in 2018.
- RISD Museum recently installed new sprinkler systems. This \$2 million campaign was entirely fundraised by the museum committee. A new Dean for Libraries was also recently appointed – a new position. Furthermore, the institution has also reframed its approach/thinking to be an “artist’s museum”, supporting all artists at any stage of their career. They now leverage this thinking for their interpretation present a cohesive narrative and talk about how artistic approaches have changed throughout history.

Conclusion: The museum plays the public facing role for these institutions and as such is often better known than the school. Providing greater opportunities to showcase the school and its work is a priority with PAFA in order to redress the balance. RISD’s new approach to focus on the artist and not the art provides a more holistic narrative that ties museum, collection, school and student together. It also appears to alleviate any tensions caused by the question “who is the museum for?”

Advice for AGNS and NSCAD

- AIC & SAIC – All challenges are easily overcome as long as both institutions and their Presidents are committed to the idea of partnership and have a shared understanding of the value and benefit that each other provides. A clear structure should be put in place early which outlines who does what, and how spaces are used so that there is no room for “bickering over the small things”. The key to success is being balanced, fair and transparent with each other. A co-location of AGNS and NSCAD “seems like a no brainer” and use common sense – share those items too big or too complex to have two of.
- PAFA – The institution’s very singular focus on fine art has allowed them to streamline mission, mandate and operations. Challenges identified for AGNS and NSCAD going forward will be to ensure that everyone is aware of the benefits and synergies of the relationship and work towards “floating all boats” together. As each department within the institution will need staff and resources to complete their work, it is important that the parameters of the relationship are set early on and very clear. Other challenges that PAFA faces that AGNS and NSCAD may face are getting museum audiences, donors and stakeholders interested in the school and vice versa. Market budgets may be higher as you are branding/marketing to multiple audiences. Other words of advice include – build projects as you get money and collaborate with outside institutions to get free programming and access to visiting lecturers.
- RISD – Address agreements and issues with as much clarity as possible from the outset of the relationship. Recognize that both school and museum bring a real richness to each other and try to stay away from adversarial language – “ours” and “theirs”.

| | Art Institute of Chicago & School of the Art Institute of Chicago | Museum of Fine Arts, Boston and Tufts School of the Museum of Fine Arts | Pennsylvania Academy of the Fine Arts and Museum, Philadelphia | Rhode Island School of Design and Art Museum, Providence |
|--|--|--|---|--|
| Relationship | Partnership (historically comingled, but both institutions grew too big to stay together. Integration stops working effectively at a certain scale) | Partnership | Integrated | Integrated |
| Mission • Museum • School | <p>AIC: The Art Institute of Chicago collects, preserves, and interprets works of art of the highest quality, representing the world's diverse artistic traditions, for the inspiration and education of the public and in accordance with our profession's highest ethical standards and practices.</p> <p>SAIC: "To provide excellence in the delivery of a global education in visual, design, media, and related arts, with attendant studies in the history and theory of those disciplines set within a broad-based, humanistic curriculum in the liberal arts and sciences. To provide instruction for this education in a range of formats: written, spoken, media, and exhibition-based."</p> | <p>MFAB: To house and preserve its preeminent collections and to serve a wide variety of people through direct encounters with works of art. The Museum's aim is to encourage inquiry and to heighten public understanding and appreciation of the visual world through increasing the standards of quality in collections, exhibitions, programs, research, and publications; assuming conservation as a primary responsibility; celebrating diverse cultures and welcoming new and broader constituencies; and creating educational opportunities for a wide range of visitors.</p> <p>SMFAT: To provide an education in the fine arts—for artists at all levels—that is interdisciplinary and self-directed. This education values cultural, artistic and intellectual diversity; it embraces a wide range of media; it stresses the development of individual vision and its relation to culture in general; it values equally the knowledge gained by thinking and doing; it is deeply engaged with the world as a whole. If the mission is constant, its practice is always transforming.</p> <p>School has separated from the museum and merged with Tufts University 2015/16</p> | <p>PAFA: Founded in 1805, PAFA is the oldest art museum and school in the nation. Through the rare combination of our spectacular galleries, our internationally known school of fine arts, and our public programs, PAFA strives to provide students and visitors alike with a unique and thrilling experience. PAFA promotes the transformative power of art and art making and will inspire the future of American art by creating, challenging, cultivating, and celebrating excellence in the fine arts.</p> | <p>School: The mission of Rhode Island School of Design, through its college and museum, is to educate its students and the public in the creation and appreciation of works of art and design, to discover and transmit knowledge and to make lasting contributions to a global society through critical thinking, scholarship and innovation.</p> <p>Museum: The RISD Museum acquires, preserves, exhibits, and interprets works of art and design representing diverse cultures from ancient times to the present. Distinguished by its relationship to the Rhode Island School of Design (RISD), the Museum educates and inspires artists, designers, students, scholars, and the general public through exhibitions, programs, and publications.</p> <p>Museum provision established in the founding documents of the school.</p> |
| Collection | <p>AIC: African, American, ancient and Byzantine, architecture and design, arms, armor, Medieval and Renaissance, Asian, contemporary, European decorative art, European painting and sculpture, Indian art of the Americas, modern, photography, prints and drawings, textiles, miniatures</p> <p>Museum does not actively collect alumni work</p> <p>SAIC: Roger Brown Study Collection (RBSC); Flaxman Library Special Collections house an array of archives, rare films, artists' publications and other unique materials; Randolph Street Gallery Archives features photographs, event calendars, posters, and other materials documenting the nearly twenty-year history</p> | <p>MFA: contains more than 450,000 works of art, making it one of the most comprehensive collections in the Americas.</p> | <p>Museum: 19th and 20th century American paintings, sculptures, and works on paper. Its archives house important materials for the study of American art history, museums, and art training. Works by leading American artists, as well as distinguished Academy alumni and faculty. Includes of works by modern and contemporary American artists, every spring semester concludes with the purchase of a student work for the permanent collection - \$1 million for contemporary work, \$1 million for historic collection. Managed to accredited museum standards.</p> <p>School: Teaching collection, mostly alumni work, not formalized/accredited, often used to decorate administrative offices.</p> | <p>Museum: Houses about 100,000 objects—ranging from ancient art, Asian art, contemporary art, costume and textile, decorative arts and design, painting and sculpture, prints, drawings and photographs, trying to make more effort to bring in works by alumni (internal initiative)</p> <p>Campus Collection: not kept to accredited standards, used to decorate offices and houses,</p> |

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| | Roger Brown Home and Study Collection, 4,020 sq.ft , 2 stories with 1 basement, Departments: Museum | | | |
| Size of exhibition space (nsf) • Museum • School | AIC Beaux Arts: 273 galleries AIC Modern Wing: 66,640 sq.ft SAIC: Sullivan Galleries offer 32,000 sq.ft for thesis shows | MFA: Art of the Americas Wing (121,307 sq.ft) devotes 51,338 sq.ft to 53 galleries SMFA: Exhibitions feature internationally recognized artists and curators, as well as work by celebrated faculty, alumni, and students. Major annual exhibitions include: SMFA Art Sale, Students Curate Students, MFA Thesis Exhibitions, Senior Thesis Program Exhibition. Barbara and Steven Grossman Gallery , 1,720 sq.ft, primary exhibition space used several times/year, hosts exhibitions of work by artists of international stature as well as work by current students and alumni. Anderson Auditorium 2,100 sq.ft, used for lectures and exhibitions. Weems Center/Atrium , used for large scale exhibition 850 sq.ft, 3 stories tall. Project Space (Weems Center) , dedicated to exhibitions organized by students. BAG Gallery holds frequently rotating exhibitions featuring student work, often curated by students. Mission Hill Building Gallery 2,000 sq.ft. Tufts University Art Gallery: Aidekman Arts Center 4,000 sq.ft hosts MFA thesis | Landmark/Furness Building (Museum): 22,000 sq.ft gallery Hamilton Building (School): First 2 floors, Fisher Brooks Gallery 7,000 sq.ft, alumni gallery 600 sq.ft | Chace Center has 6,000 sq.ft of special exhibitions space Museum Net assignable sq.ft 72,056 (Source RISD FAQ factbook 2016) |
| Distance Between Facilities | 280 Columbus Dr & Modern extension – conjoined facility | 0.3 miles. School situated within 1 block of the Museum. The School's main campus is adjacent to and just to the west of the Museum of Fine Arts. | The Academy is comprised of 2 buildings located at 118 and 128 North Broad Street. They are situated across the street from each other. | The Museum is located at the heart of the RISD campus. Also located adjacent to Brown University Campus and is used often by the students and staff there as a teaching museum. |
| Shared Facilities | <ul style="list-style-type: none"> • Large auditorium – agreed allocation • Mechanical – chiller plant, boilers with individual meters • Loading docks | | <ul style="list-style-type: none"> • Very cooperative relationship. • School takes overall Hamilton Galleries for thesis show (1.5 mth installation) • Sometimes school curate shows at SFA Gallery • Coordinates events/weddings/parties | The Chace Center: <ul style="list-style-type: none"> • Main floor lobby • Gift shop • Metcalf auditorium |

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| | | | <ul style="list-style-type: none"> Shared calendar for scheduling management | |
| School Facilities Used by Museum (e.g. classroom, theater spaces) | | <ul style="list-style-type: none"> Van Alan Clark Jr Library? Writing Studio? Grossman Gallery? Computer Labs? Advanced Production Lab? Media Stockroom? School Store? Café des Arts? Shuttle? | | |
| Museum Facilities Used by School (e.g. rentals spaces, retail) | <ul style="list-style-type: none"> Historic library and archive SAIC orientation/graduation/gala uses museum event spaces Students walk freely between the school at 280 Columbus and museum – separate door | SMFA students have free access to museum collections and exhibitions, as well as the Morse Study Room where works on paper not currently on view can be examined up close. | | |
| Other Benefits of Close Proximity | <ul style="list-style-type: none"> Students continue to have open access to the museum, its research library, and its collections Visiting artists lecture at the school and for the museum’s public Collaborative education programs – able to teach museum studies in a practical setting Have a “much deeper bench” when it comes to staff and are able to attract more experts and specialized knowledge Keep each other fresh and energized | In addition to invitations to concerts, films and special events, the SMFA community has access to the Museum’s curatorial and conservation staff, and students have opportunities to intern or assist with installations. Internationally acclaimed artists visiting the MFA frequently make exclusive trips to the School to meet, lecture, and work with SMFA students and faculty. | Students from a list of recognized colleges and universities receive free admission | |
| Approximate Current School Enrollment <ul style="list-style-type: none"> Full-Time Undergraduate Full Time Graduate Part-Time Undergraduate | <ul style="list-style-type: none"> Undergraduate students: 2,842 Graduate students: 748 Total Enrollment: 3,590 (2015) | <ul style="list-style-type: none"> Undergraduate 385 Graduate 163 Total Enrollment: 548 <ul style="list-style-type: none"> Incoming Freshmen: 70 Undergraduate Acceptance Rate: 90.4% Tuition: \$40,388 | <ul style="list-style-type: none"> FT Undergraduate students 173 PT Undergraduate students 9 FT Graduate students 112 PT Graduate students 0 | <ul style="list-style-type: none"> FT undergraduates 1,971 PT undergraduates 0 FT Graduate students 415 PT Graduate students 0 Total: about 2,400 (Source: 2016 Niche.com) |
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| <ul style="list-style-type: none"> Part- Time Graduate | | | | |
| Average Annual Museum Attendance Past 3 Years | <ul style="list-style-type: none"> 1.55 million (2015) 1,424,105 (2014) 1,539,716 (2013) | <ul style="list-style-type: none"> 1,227,163 (2015) 1,132,206 (2014) 1,029,734 (2013) | <ul style="list-style-type: none"> 132,532 (estimate), 2016, 2015, 2014, 2013 | <ul style="list-style-type: none"> 2016: 100,987 (estimate) 2015: 100,987 (estimate) 2014: 100,000 (estimate) |
| Estimated Museum Audience Characteristics: <ul style="list-style-type: none"> Museum school students, faculty staff as % of total Residents (50-mile radius) School groups (elementary and secondary level) Tourists 100% | | MFAB: <ul style="list-style-type: none"> Visits to mfa.org: 4,876,260 Education and public program attendees: 137,999 Member households: 72,356 Youth visitors: 86,467 Visitors to MFA touring exhibitions: 809,876 Patron Members: 831 Council Members: 342 Corporate Members: 123 | <ul style="list-style-type: none"> Museum visitors predominantly come to see the collection and attend the end of year student show where works are on sale 39.7 million visitors to Philadelphia in 2015, 88% for leisure purposes (<i>source: Visit Philadelphia 2015 annual report</i>) | 2015 Museum Visitor Information (Source RISD FAQ Factbook 2016) <ul style="list-style-type: none"> Adult (general admission) 39,575 or 39.1% Seniors 7,240 or 7.2% College Student other than RISD 12,789 or 12.6% Youth (5-18) 8,308 or 8.2% Children under 5 years 894 or 0.9% Museum Members 2,544 or 2.5% RISD Students 15,344 or 15.2% RISD Staff Member 1,632 or 1.6% Brown University Student/Staff 4,519 or 4.5% Student Tour (incl. chaperone) 8,365 or 8.3% Museum has one mission but multiple constituencies Museum attendance has never been higher Museum donors tend not to be alumni but members of the community – RISD Museum very much seen as the Rhode Island State Museum 6,000 artworks pulled per year by students for research Museum has little access to alumni network |
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| | (1979-1998) of an important Chicago cooperative, gallery, and performance space; 16mm Film Study Collection - discipline specific and managed by the department | | | |

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| <p>Approximate Total Size of Buildings – gross sq. ft.</p> <ul style="list-style-type: none"> • Museum • School | <p>AIC: 2 interconnected buildings, Beaux Arts building (562,000 sq.ft) and 2009 expansion (264,000 sq.ft) increased footprint to nearly 1 million sq.ft, second largest museum in the US after the MET, includes 15,300 sq.ft Ryan Education Center</p> <p>SAIC: downtown campus consists of 6 academic buildings located in the immediate vicinity of the AIC building. 280 Columbus Drive 120,364 sq.ft, built 1976, conjoined with AIC comprises 3 floors, 1 basement, Departments: Ceramics, Painting and Drawing, Performance, Photography, Print media, and Sculpture, classrooms, departmental offices, studios, Betty Rymer Gallery. Sharp Building, 193,681 sq.ft, 13 stories with one basement, Departments: Contemporary Practices, Art Therapy, Art Education, Writing, Fiber and Material Studies, Visual Communication Design, Deans and Division Chairs, President’s Office, Flaxman Library, Campus Life. MacLean Center, 237,256 sq.ft, 17 stories with 3 basements, Departments: Art History, Theory, and Criticism; Visual and Critical Studies; Liberal Arts; New Arts Journalism; Art and Technology Studies; Film, Video, New Media, and Animation; graduate studios; undergraduate studios. 116 South Michigan Ave, 43,527 sq.ft, 17 stories with 1 basement, Departments: Historic Preservation, IRFM main office, Wellness Center, graduate studios, general use classrooms, science labs, and Art Institute of Chicago museum offices. Sullivan Center, 150,693 sq.ft, 4 floors leased to SAIC, departments: Architecture, Interior Architecture, and Designed Objects; Fashion Design; Office of Exhibitions and Exhibition Studies; Student Affairs; Admissions; Financial Aid; Registrar; Continuing Studies; and graduate studios. Spertus Institute, Departments: 5 leased classrooms for Liberal Arts/Art History.</p> | <p>MFA: 1909 Beaux Arts building, Jean S. and Frederic A. Sharf Visitor Center 5,000 sq.ft West Wing (designed by I.M. Pei) in 1981</p> <p>Art of the Americas Wing (121,307 sq.ft) opened 2010, includes Barbara and Theodore Alford Auditorium, 150-seat, 2,128 ft., Gund Gallery 8,300 sq.ft, 16 ft. high, Shapiro Family Courtyard (12,000 sq.ft), enclosed by glass. Increased building’s total sq.ft by 28%, from 483,447 sq.ft to 616,937 sq.ft.</p> <p><u>Total:</u> Latest expansion increased building’s total sq.ft by 28%, from 483,447 sq.ft to 616,937 sq.ft.</p> <p>SMFAT: Original building (45,000 sq.ft) designed by Guy Lowell, completed in 1927. 1987 renovation and expansion designed by Graham Gund. More than doubled the size of the existing structure and provided an auditorium, enlarged library, expanded studios and classrooms, a spacious new entrance, cafeteria, and increased gallery and exhibition spaces.</p> <p>Central Katherine Lane Weems Center/Atrium connects the two buildings, houses Café des Arts and the community gathering area, and is also a popular spot for exhibitions and performances.</p> <p>Mission Hill building, recently renovated, includes studio spaces for graduate and Post-Baccalaureate students as well as classrooms, workshops, the Writing Center, and the Registrar's office.</p> | <p>Museum: Furness Hewitt Building (National Historic Landmark), built 1896, 18-20th century galleries, 72,000 sq.ft total, of that 11,000 sq.ft classroom – not accessible to public, and storage, mechanical, office. Auditorium, Theatre seating - capacity 140 guests, Washington Foyer and Rotunda, offices, classrooms, and gallery space for PAFA</p> <p>Samuel M.V. Hamilton Building 240,000 sq.ft, 10.5 floors (approx. 25,000 sq.ft/floor), of that 136,000 sq.ft classrooms, Fisher Brooks Gallery 7,000 sq.ft, 3,000 sq.ft student studios, rest are offices, first 2 stories used for galleries, opened 2006, includes a doubling of gallery space, café, and gift shop; specific floors for administration, library, and student services; several levels for sculpture, printmaking, and foundry shops; individual student studios; and major painting studios with northern light. Center for the Study of the American Artist 4,000 sq.ft, 5th floor, Works on Paper Collection storage space.</p> | <p>Museum: comprised of 5 interconnected buildings: Waterman Building, Pendleton House, Radeke Building, Farago Wing, and Chace Center - opened 2008 with 6,000 sq.ft for special exhibitions and a downtown-facing entrance</p> <p>Total net assignable sq.ft. 72,056 sq.ft (Source RISD FAQ factbook 2016)</p> <p>The Chace Center is a 5-storey complex:</p> <ul style="list-style-type: none"> • Main floor shared lobby, gift shop and Metcalf auditorium • 2nd floor student gallery • 3rd floor special exhibitions museum gallery (6,000 sq.ft.) • 4th floor works on paper collections storage, 3 curatorial offices, 2 object classrooms and a conservation lab • 5th floor RISD first year student studios <p>School: Total net assignable sq.ft for Academic space 396,347 sq.ft</p> |
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