Bruce County Museum & Cultural Centre
Feasibility Study
RFP BCM&CC #16-01
08 February 2017
Preface

The Commission

The Bruce County Museum & Cultural Centre (hereinafter referred to as the Museum or BCM&CC) has had an active role in the community and been growing since its creation in 1955. The Museum’s last major building project was completed in 2005; and since that time, the Museum has continued to grow serving thousands of visitors and showcasing insights into the land, people, marine heritage, and culture of Bruce County. The 2005 expansion did not, however, include a plan for further physical expansion on site. The implementation of the new five-year Strategic Plan as well as the outcomes of the 2015 Accommodation Plan offers the opportunity to consider the future physical needs of the Museum and Archives.¹

The proposed study will investigate and document through research and consultation, the feasibility of the two recommended options purposed in the Accommodation Plan. The study should provide direction in regards to the purposed recommendations to provide a framework for future decisions regarding use of space for the BCM&CC. The Feasibility Study will analyze necessary elements in order to support future projects and be structured to ensure decisions by County Council are supported through accurate documentation including operating and capital budget projections.²

The Study

In undertaking this Feasibility Study, the authors completed 14 interviews with Community stakeholders, reviewed 6 key documents, held 3 meetings with Museum/Archives staff, and carried out a fundraising assessment of the Community. This work was in addition to the 16 community consultations, 6 physical and virtual meetings with BCM&CC staff and the review of 6 key documents, undertaken during the original Accommodation Study.

In this Report, all quotes are noted in *italic type* and footnoted for ease of reference. The full Fundraising Report is appended for reference and its key findings are referenced in the body of this Report. The authors recognize the seminal contributions of the staff of BCM&CC and the Client leadership of its Director, Cathy McGirr in completing this Study. We also thank the more than 30 community members who have participated in the consultations to date.

BCM&CC also recognizes with appreciation the financial support of the Canadian Cultural Spaces Fund for a portion of the cost of this Feasibility Study.

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² Request for Proposal for Services to Develop a Feasibility Study, RFP BCMCC #16-01, August 4, 2016.
Executive Summary

There has been no physical expansion of space for the BCM&CC since 2005. The four major challenges facing the Museum are identified and recognized by County Council as:

1. The Archives will reach 100% capacity by 2020.
2. Collection Management will reach 100% capacity by 2022/25.
3. In both the Archives and Collections Storage facilities there are already challenges to the care and access of these heritage materials owing to increasing lack of space and facilities.
4. A serious lack of public program space which limits community engagement and public program development.

In addressing these challenges in the Accommodation Study 2015, the Museum considered 5 options, each with strengths and weaknesses and successful in varying degrees. After discussion and consideration, two options were identified by the Museum and the Bruce County Council to be explored:

1. New Build of an Archives in a shared space with community partners, and the repurposing of existing Archives space in the BCM&CC building for collection and program development purposes.
2. New Build of an off-site storage facility, perhaps with other County(s) partners.

Declined Options:

3. Convert the Theatre to Archives space (declined as space insufficient & unsuitable for Archives and loss of theatre creates a program challenge. The solution also did not address Collections or non-collections storage needs, or the need for new program spaces).
4. Loss of double height galleries (declined as space does not address Archival or Collection needs and created inferior gallery spaces and would close the Museum for a minimum of one year).
5. Loss of temporary gallery space (declined as space does not address Archival or Collection needs and diminishes the capacity for BCM&CC to continue its diverse program of temporary exhibitions which drives attendance).

In considering local, logical partners, the authors approached community stakeholders with the Anglican Church about the use of its Community Centre and Manse (Rectory), with the Library Board about the potential to link Library and Archives, with the School Board to understand the future intent for G.C. Huston Public School and its lands, and with the broader recreation programs of Saugeen Shores to understand the leisure time options in the Community. The authors also noted how the proposed program for BCM&CC would support elements of the Bruce County Economic Development Strategic Plan 2017-2021 as is reference in section 1.2.1 of this current Study.

Members of the Consulting Team conducted 14 interviews with stakeholders and interested parties from early November to mid-December 2016. Those interviewed represented a wide range of experience and expertise from participants in volunteer organizations, educators, residents, administrators as well as knowledge workers and heritage professionals. Interviewees noted that BCM&CC and the heritage and
tourism resources in the immediate neighborhood by the Lake are well positioned to function as a dynamic cluster of activities and services as part of a Community/Cultural Hub. This approach would likely entail a combination of some of the elements of a Cultural Campus/Massed Model in combination with facilities at St. Paul’s Anglican Church Community Hall, the Rectory and the Town Hall.

We recommend that a new Archives be built either 1) over the Community Gardens between the Lake walking path and Victoria Street parking, or 2) over the Garage area of the former Rectory between the Lake and Victoria Street. In either option the new Archives would be physically connected to the existing BCM&CC facility via an enclosed walkway or bridge as appropriate. We project the capital cost of the new Archives to be approximately $5.29 million of which the Museum’s Archive Trust would contribute $500,000 the County $1.2 million, fundraising $3 million and government grants $600,000. This includes retrofit of repurposed space and the fit-out of these spaces. It has a projected planning and implementation period of 36 months from approval and completion of the Fundraising Plan.

We also recommend that a new off-site storage be built at a site agreed among/between County partners. We project the program cost of the off-site facility to be $2.63 million of which Bruce County would pay $500,000, a potential department or County partner $500,000, with fundraising of $1 million and government grants of $625,000.

All fundraising assumptions should be tested by a Financial Fundraising Study included in the overall cost of the program. It has a projected planning and implementation period of 60 months from the completion of Fundraising Plan.

It should be noted that these projected costs are exclusive of specific elements noted in section 6.1 (Capital Budget) of this Study such as land acquisition, parking and county project management costs.
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1.0 Strategic Contexts for BCM&CC Project

In considering the two options to accommodate the space needs of BCM&CC, it is important to understand the project within the context of Provincial, County, and Institutional strategic plans and ambitions.

BCM&CC is a County service and its ambition is to touch the lives of all residents and visitors of the County. Near- and long-term planning must, therefore, assume a continued growth in the use of technology and a continued emphasis on encouraging the growth of knowledge-based industries in the County to achieve these ambitions. Therefore, the recommendations for the implementation of the Accommodation Program can not solely address the physical space needs of the Museum but also how the spaces created contribute to the Provincial, County, and Museum ambitions for service to the County.

1.1 Provincial Context

In the Ontario Culture Strategy paper, *Telling Our Stories, Growing Our Economy*, the Provincial Minister of Tourism, Culture, and Sport noted that “This Strategy (The Ontario Culture Strategy) builds on all of that (consultation) work by focusing government support where it is needed most: to promote cultural engagement and inclusion, strengthen culture in communities, maximize the contributions of culture and creativity to our knowledge economy and promote the value of the arts throughout government.”

Today cultural industries represent 3.4% of the total GDP of Canada. Of this number 44.7% comes from Ontario. The Province of Ontario generates more money from cultural industries than any other province in Canada. There are about 301,100 jobs in the cultural industries in Ontario, which is 4.5% of all the jobs available in Ontario. As noted in the Ontario Museums 2025 Study for Museums (but true for all the cultural industries) more research and more emphasis on knowledge transfer is necessary to broaden the development of cultural industries and their employment opportunities, particularly in smaller population centres.

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3 The Ontario Culture Strategy: Telling Our Stories, Growing Our Economy, 2016, Ministry of Tourism Culture and Sport, p. 4.
Three strategic goals of the Province are to:

1. **Promote cultural engagement and inclusion** with the expectation that “People of all ages and abilities will have more opportunities to engage with arts and culture” and that “Youth will have more information and supports available to help them pursue careers in the culture sector.”

2. **Strengthen culture in communities** and that "Community museums, historical societies, historic sites, archives and other heritage organizations conserve and promote our cultural heritage through their collections, interpretive displays and diverse programming. They act as research centres and community spaces for public education, dialogue and knowledge-sharing"; that community museum must "Work with government partners and culture stakeholders to maximize the use of public libraries, museums, galleries and other culture facilities as community hubs and explore opportunities to integrate arts and culture activities and spaces into schools and other community facilities. The government notes the expected results will be that “Funding will be targeted to support a greater diversity of organizations and key priorities (e.g., digital services).”

3. **Fuel the Creative Economy** with the expected results that "The Ontario government will develop more effective tools to help our culture sector compete in the digital world", that "There will be more opportunities for Ontario government/industry collaboration to drive cultural industry productivity, innovation and exports." and that "More Ontarians will be equipped with the skills and knowledge necessary to contribute to the creative economy.

The Strategy envisions that by 2025, museums across the Province, through knowledge of the range and significance of collections held by individual institutions "have collections that are used to inform discussions and promote public understanding of contemporary issues and environmental sustainability. Museums explore creative ways and use digital technologies to facilitate not only public access to but also public use of collections."

It is suggested in the Study that enhanced reality and distant learning may be the best practices for communicating and engaging with youth (15-24) and seniors (60+). Like most museums, BCM&CC works well with nearby residents 60+ but is challenged by engaging directly with youth and with those residents who live at a distance from the core facility. The Museum recognizes that it must seek to "develop models for shared spaces, shared service delivery and shared resources, identifying potential partners to better optimize the use of resources" with a focus on regional solutions.

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6 The Ontario Culture Strategy: Telling Our Stories, Growing Our Economy, 2016, Ministry of Tourism, Culture, and Sport, p. 17.
7 Ibid., p.19-20.
8 Ibid., p. 25.
9 Ibid., p. 5.
10 Ibid., p. 5.
1.2 County Context

1.2.1 Development

*Exploring in Bruce County is part of everyone's story here, whether you're a small business owner, a farmer, a high school student, a mom or an engineer in the power sector.*\(^{11}\) BCM&CC is a key partner for anyone exploring the County and it can deliver more.

Economic development in any location is not just about tax rates, the economics of the business sector, or the quality of the labour force; it is also about an entrepreneur, an innovator wanting to raise their family in a safe and culturally enriching environment. This cultural imperative is particularly demonstrated where the five Business Development Target Audiences intersect with the five Tourism Sector Development Audiences.\(^{12}\) At most of the intersections (five by five matrices of target audiences) is the BCM&CC.

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<th>Tourists</th>
<th>Seasonal Residents</th>
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As well, in considering the *11 Elements of a Comprehensive Approach to Economic Development*\(^{13}\), BCM&CC and its programs are a significant part of **Element 6 Focused Sector Development** and important in **Element 7 Enhancing Trade Opportunities, New Foreign Investment and Entrepreneurial Immigration**. While the Economic Study does not specifically address the Cultural Industries in its analysis, the Museum and its cultural partners in the County (music, theatre, festivals, etc.) are essential to the development of the Tourism Sector, both in attracting new visitors and in developing repeat visitation to the Region. Equally, when considering Foreign Investment or New Canadian Entrepreneurial Investment, the Museum is a connection point, both as a welcome and orientation to the Region and as a demonstration that Bruce County is contemporary, connected, and engaged with all its citizens. BCM&CC is a cornerstone of cultural life in Bruce County and the exploration of life in Bruce most often begins with the exploration of BCM&CC.

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\(^{11}\) Bruce County Economic Development Strategic Plan 2017-2021, p. 3.

\(^{12}\) Ibid., p. 21.

\(^{13}\) Ibid., p. 9.
1.2.2 Strategic Plan\textsuperscript{14}

The County, in its Strategic Plan, recognized these Provincial goals and embraced them in the thinking of many of the County's specific ambitions including to:

1. \textit{Develop and implement tactics for improved communications - One County with a unified voice.}
2. \textit{Leverage Technology seeking effective, understandable communication (web based and special media).}
3. \textit{Find creative new ways to engage our public - Make the county fully accessible to the people through access to information and 4) Focus on the internal and the external customer/client needs first.}
4. \textit{Explore alternate options to improve efficiency, service - Coordinate working with other agencies.}
5. \textit{Stimulate and reward innovation and economic development - Vocally support all industry in Bruce County.}
6. \textit{Actively seek out post-secondary campus for Bruce County - Capitalize on knowledge/skill/experience of our residents.}

\textsuperscript{14} 2013-2023 Bruce County Corporate Strategic Plan.
\textsuperscript{15} BCM&CC 5 Year Strategic Plan Update March 2015, p. 4.
1.3 Museum Context

The Bruce County Museum & Cultural Centre’s Strategic Plan shows that "the museum, archives and cultural program activities of the BCM&CC are all seamlessly integrated into one organization that provides services in the collection of relevant materials relating to the historical growth, development and current situation of Bruce County, and the interpretation of this resource through programs and activities both in the Centre and throughout the County."¹⁶

The Plan identifies that the Museum is simultaneously working on five pillar activity areas.

1. **Forge Partnerships and Relationships**: A measure of the utility and relevance of the BCM&CC is the extent to which it is able to develop partnerships and relationships with other County-level organizations. These provide credibility, resources, and reach to the BCM&CC (in the sense of helping them to get out of the building and serve people across the County).

2. **Provide Compelling Relevant Programming**: A strong focus on providing relevant programming is inherent in the plan. Relevance is demonstrated by awareness and interest in exhibits and programs, translating into visitation and participation.

3. **Optimize the Use of Space**: The process revealed many areas in which the existing footprint of the building was not being used to best advantage. A third strategic pillar is thus to ensure that existing space is being used for maximum benefit and, once this has been achieved, to assess current and future needs for more space for key critical functions.

4. **Create County-Wide Awareness**: It is recognized that as a County-level institution, the BCM&CC needs to be seen as such and strive to overcome a ‘Southampton-centric’ focus. Strategically, the first task is to create a higher level of County-wide awareness, which then over time will translate to higher levels of awareness and attendance. This, of course, also supports the importance of partnerships that can help take programs (and possibly exhibits) into the farther reaches of the County.

5. **Develop the Resources Required**: All of the foregoing requires resources – both staff and financial – and the fifth essential pillar of the strategy examines ways and means of increasing those resources available to the BCM&CC.

¹⁶ Bruce County Museum & Cultural Centre, 5-Year Strategic Plan Update, Final Report March, 2015.
1.4 Accommodation Program Contributions

The general recommendation from the Accommodation Study 2016 was to build two new facilities: one near-term, a dedicated Archives and one longer-term, a shared off-site Collections Management Centre.

It was always assumed that the Archives would be in a shared facility with specific areas designed for use by Community partners. The Library, the School Board, County Public Services, First Nation communities and the broader community in general, and other potential partners including municipal recreation programs particularly for seniors and research\textsuperscript{17} were all considered and investigated as part of the Community consultation.

In recognizing the Provincial, County, and Museum goals and ambitions, the Feasibility Study embraces the new vision for museums in Ontario to look far beyond the Museum as a repository of collections and to consider the Museum as more of a research facility with the opportunity and obligation to celebrate the stories these collections tell. Museums in the 21\textsuperscript{st} century will be less "missionary" sending its content and messages out across the County and Province, and more of an empowering vehicle for dialogue as across a "council fire" or a "council table."

In considering the feasibility of the Accommodation Program, the Consultants recognized that simply housing the growing collections (Archives and Museum) and shifting the desks within the existing facility will not achieve the strategic goals of any of the Museum's partners (Provincial, County or Community) and that the new facilities must integrate the tools, resources, and vision of these partners into the thinking of these two new facilities.

For this reason, and through Community consultation, we have sought to identify opportunities to link the strategic planning of our partners with the proposal and planning for new facilities.

\textsuperscript{17} Saugeen Shores, Recreation Master Plan, October 2016, Monteith + Brown.
2.0 Community Consultation

As part of the process of studying current uses and levels of satisfaction with the existing site as well as exploring future aspirations and opportunities for the Museum, the Consulting Team Project Lead conducted 14 interviews with stakeholders and interested parties in Bruce County over a five week period from early November to mid-December 2016. Those interviewed represented a wide range of experience and expertise from participants in volunteer organizations, educators, residents, administrators as well as knowledge workers and heritage professionals. Further, as much as possible, they represent members of different parts of Bruce County and persons of different age groups and backgrounds.

We are grateful for the time and insight our interviewees provided. The Consulting Team thanks them and is always happy to learn about the people and places of this wonderful part of our Province.

2.1 The Role of Bruce County Museum & Cultural Centre

These consultative discussions addressed what people think of the Museum in the Community and how the Museum/Archives might change in the future. It was evident from all the respondents that the Museum and its facilities such as the exhibitions, Archives, meeting rooms and programming spaces are seen as taking an active role in the life of Bruce County in terms of:

- **Preserving and interpreting the past** acting as a collective memory and a representation of an increasing understanding of the region’s unique heritage.

- **Enhancing life today** by staging events, programs, and exhibits in ways that are interactive, participatory and responsive to the interests and needs of the community. People see the Museum as an active place that is engaged with the public. Further, there is awareness that the Museum contributes to the economy and leverages the work of other services such as arts groups, schools, and communities.

- **Preparing for Bruce County’s future with services** for the next generation, attracting families with programs of value as well as “beautifying” the surrounding areas and supporting education by collaborations with the school system and helping to make the case for investments by businesses, colleges and universities.

A common theme that emerged here was the concept that the Bruce County Museum & Cultural Centre is, and should continue to grow, as part of some form of a Community/Cultural Hub. This may entail expanding or extending some of the Museum’s facilities and programs as well as specifically collaborating with other organizations and sites with complementary objectives and resources.
2.2 Working with Bruce County Museum & Cultural Centre

The ways that people in the Community are connected to the Museum reveal the diversity and depth of the services and resources the institution provides. Further, this suggests opportunities where the Museum might partner with others, and areas where there could be effective alliances in the delivery of important services.

The range of responses reflect participation in the volunteer and area interest groups that support the Museum – such as local history societies and genealogy enthusiasts but also the active role of the school and library services in the Museum’s key role of supporting archival and records management resources to the County.

The Museum has facilitated the work of groups set up to preserve and interpret local history (e.g. marine heritage) and also partnered with members of the public in generating unique exhibits and programs based on community-generated content (e.g. recent exhibitions on Freemasonry and World War I). Further, the Museum is an important player in efforts to preserve County records and assist with access through cooperation with government digitization efforts.

2.2.1 Strongest Features/Best Things about the Current Site and Building

Interview responses, in total, express an overall very favourable view of the Bruce County Museum and what it offers to the public. These positive features all into the following broad categories:

- **The Museum as Partner**: Respondents were very pleased by their experience working with Museum staff stating that they were dedicated, hard-working and enthusiastic.

- **The Museum as Experience**: Again, people enjoyed the exhibits, lectures, concerts and events they experienced at the Museum; sometimes being pleased that the Museum was there as a place for group visits and lectures and other times being surprised (and pleased) when they saw the Museum’s active participation and cooperation with non-museum generated community programs such as the Scottish Festivals and Pumpkin Festivals, for example. The interactive and changing nature of the exhibits as well as the value of the Museum and Archives as a research resource were among the most mentioned positive features at the Museum. The overall sense of the BCM&CC experience is that it can be something of a “surprise” to have a museum of this quality in a community of this size.

- **The Museum as Place**: Most people like coming to the Museum and its grounds; they find it a pleasant and attractive setting and its presence supports a sense of civic pride. Some respondents like the sense of light and the vista they receive when they enter the building while others love the connection to the Lake and the connections of the outdoor and indoor experiences. Whatever happens at the Museum in the future, it will be important to build on these affirmative elements.
Under the separate question about “what are the best things about the Museum?” the Consultants probed for more specific ideas about how the grounds and building were working for the public. Here people told us:

- They were pleased with the landscaping and overall appearance of the Museum and Cultural Centre.
- They appreciated access to the meeting rooms and public event spaces.
- The parking situation at the Museum is very good. Most visitors stated that the site is easy to reach by car.

### 2.2.2 Improvements Needed at the Museum

There were a significant number of ideas under this category but it is important to note that most of these comments were made in the spirit of constructive ideas that might help the Museum do more of what it is already doing very well. The main theme here was that the BCM&CC was having to deal with the outcomes of its on-going success.

Suggested improvements fell into the following categories:

- **Location and mandate**: These comments addressed the reality that Bruce County is a large and relatively sparsely populated area. There were some concerns that the BCM&CC is perceived as “Southampton’s museum” and does not really service the more outlaying edges of Bruce – who may see museums and historic sites in Grey County, Owen Sound or Huron as more “their museum”. People are free to visit and love any museum they want to, however interviewees correctly indicated that it is desirable to find ways both to extend the presence of the BCM&CC throughout all of Bruce and encourage people to travel further to visit.

- **Site and building**: In some instances, the site and building were seen as over-crowded, inefficiently laid out or suffering from outmoded equipment. The Archives were described in this manner – the staff were highly commended as were the research holdings but there were concerns about collections care and processing. The Theatre was also discussed at some length, notably the need for more seating and a better AV/lighting system. Other comments related to meeting rooms, gallery and floor layouts and the gift shop and kitchen.

- **More generalized use of technology**: Again, while elsewhere interviewees noted their approval of the interactive elements in the galleries, some also noted that some displays could be more participatory and immersive and that the Museum should consider improving its electronic media strategy by improving its AV system and upgrading its website. In light of the CRTC’s recent decision declaring the internet an essential service to all Canadians, the latter option may become more achievable to institutions such as the BCM&CC.

- **Improved programming and services**: These comments ranged from more French language content and interpretation, a greater representation and participation by local First Nations groups as well as provision for the needs of both very young and senior visitors. All these ideas should be applied as criteria in the next phases of planning and development. It is noted that there are not a lot of French emersion classes in Bruce and the primary French speaking community is modest. It was also noted that BCM&CC does provide bilingual text and interpretation in all of its
traveling exhibitions. As to participation with First Nation groups, the Museum is currently engaged with First Nation communities on the reinterpretation of its First Nation Gallery.

2.2.3 Development Options/Best Options for Groups and Community

One of the surprising outcomes of the interview process was that most participants seemed reluctant to identify one or two preferred options or even to note which options they definitely did not want to pursue. This was in spite of the fact that interview questions were structured to give “three passes” at a preferred option.

However, those interviewed still provided very useful information by providing the Consulting Team with conditions and criteria they recommend us to use in selected the optimum development model:

- **Affordability and Sustainability**: These were the most common concerns raised in this discussion. Respondents felt that the Campus/Massed Model options would most likely best serve the needs of the Community in the long-term.

- **Heritage Architecture VS New Construction**: Almost very respondent stated that they greatly appreciated the mix of “old and new” building elements at the existing Museum. Even those with concerns about the current layouts say that they would like some aspect of this combination to be maintained in the future.

- **Separate Collections Storage and Archives**: There was some concern expressed at this proposal, especially by those involved in local history and genealogical research who state that they get good use out of the proximity of the current Museum’s meeting rooms and back-of-house storage. There was also concern about diffusing communication and collaboration between staff as well as staff and volunteers if the storage and support facilities were located too far away from the exhibition and public programming spaces.

- **Rationalization of Administrative Spaces**: Some respondents were not so concerned about location of administrative offices in a new and/or separate building, although this also might spread staff across different locations.

- **Central VS Satellite**: Related to the above points, there was commentary about the desirability of centralizing as much of the BCM&CC’s facilities and operations as possible and what happens if the Museum has a programming and preservation presence throughout the whole of Bruce County. The central “campus” or “massed model” has the potential of becoming an even more substantial attraction to the area but could also be viewed as an even larger institution that is “just” for Southampton and Port Elgin. Another idea that arouse was the idea of having the Museum export its exhibits and programs through “satellite” installations that could be placed at libraries, community centres and smaller museums throughout Bruce. A central campus complex could develop traveling displays like this but so could a smaller, more networked museum.

- **Shared Facilities and Collaboration**: This area of discussion is informed by the above points and also relates the future of G.C. Huston Public School. The future of that school very much impacts on any plans for the BCM&CC’s future development at or adjacent to that site. According to representatives of the Bluewater District School Board and the G.C. Huston School itself, the
plan is to keep the school open for the foreseeable future and this may entail refurbishment and new construction at some point. There is the possibility that the Museum and G.C. Huston could collaborate and establish a “museum school” and/or history lab where students could work with collections and museum staff and volunteers to “go to school at the museum”. This approach may have particular merit as the student population at G.C. Huston is now 45% First Nations and Metis and the Museum has existing collections and research that would support the School’s Elder-Youth Education initiatives.

Interviews also included that the proposal made in the 2016 Accommodation Study of adding a branch of the local public Library to a Museum campus is not achievable under current circumstances. This is because of different funding and ownership policies between the Township and County. New legislation would be required to allow for this arrangement.

Other opportunities for collaboration include the Rectory associated with St. Paul’s Anglican Church. The Church itself has a recently refurbished community meeting hall which is suited for concerts, performances and lectures. The service and programming opportunities presented by long-term partnerships with the Church and Town Hall should be factored into the selection and articulation of the Development Option.

### 2.2.4 Special Needs and Concerns

The last question was intended to give participants a final chance to qualify or add to any of the statements made earlier – as well as to put their thoughts into a wider context. Most of the ideas here addressed:

- **Audience and role**: There is a pressing need for more First Nations participation in the future of the Museum. The view by most respondents was that the BCM&CC is currently reaching out to these groups but this needs to be continued and increased whenever possible. Also, the needs of seniors and youths were noted. Seniors are a loyal and constant user group who have special needs for access while young people tend to be under-served in smaller population centres.

- **Coordination with Existing Programs and Initiatives**: The future of the Museum should be coordinated with other things that are happening in the County – ranging from services for New Canadians to continuing to offer work placements for local families to incorporating the new County branding and tourism campaigns.

- **Ideas for making the Museum more fun and accessible**: Including joint membership programs with other attractions.
### 2.2.5 Community and Cultural Hubs

Another recurring idea that came up throughout many of the interviews was that of Museum serving as a key element in a Community or Cultural “Hub”. Interviewees noted that the County and the Province are promoting this concept in communities and that the BCM&CC and the heritage and tourism resources in the immediate neighbourhood by the Lake are well positioned to function as a dynamic cluster of activities and services, i.e. a Community Hub.

This approach would likely entail a combination of some of the elements (perhaps with some off-site storage that is not too distant) in combination with the Church Community Hall, the Rectory and the Town Hall. This would allow for a diversity of appeal, flexibility in what can be offered to the public, and the potential of provide more experience on a year-round basis. While not directly addressing the space challenges of the Museum, and the purpose of this current Study, it is important to recognize that cooperation among and between these adjacent and proximal facilities offers a significant leveraging opportunity to increase the total community public program offering at a minimal capital cost and extremely low additional administrative costs for Bruce County and Southampton. This integrated approach and service provision strategy is consistent with County and Museum strategic plans and ambitions.

The authors note that the definition of a cultural or creative hub is, "a place, either physical or virtual, which brings creative people together, which provides space and support for networking, business development and community engagement."\(^\text{18}\) The British Council's Creative Economy study noted that "work on knowledge hubs and knowledge clusters suggest that it is the hub’s capabilities in the exchange, transfer and facilitation of knowledge that is their primary focus. This work states that knowledge hubs fulfill three major functions: 'to generate knowledge, to transfer knowledge to sites of application, and to transmit knowledge to other people through education and training'. They define knowledge hubs as 'local innovation systems, [that are also] nodes in networks of knowledge production and sharing'. They are predominantly characterised by high internal and external networking and knowledge sharing capabilities where they also act as meeting points of communities."\(^\text{19}\)

The Community Hub being suggested by the opportunities identified during this Study, reinforce the concept of Southampton as a knowledge/cultural hub serving the County. The thinking of the BCM&CC is absolutely consistent with international trends for the development of such hubs and the creation of the new Archives building; when envisioned as part of a larger community rethinking of the entire extended site and surrounding facilities, this may provide very significant benefits to the Community beyond the establishment of a new facility in Southampton to meet near-term archival needs.


### 3.0 Fundraising

The Fundraising Plan prepared by FUNDING matters inc. for the Capital Campaign in support of the BCM&CC outlines principles of Major Gift fundraising, determines success factors for achieving the campaign goal, and defines roles and responsibilities of volunteer leadership throughout the campaign. The Plan elaborates upon the procedures, policies, activities, cost and organizational structure through which BCM&CC will attract the funds needed to achieve its campaign goal. Although the Plan clearly outlines the theoretical background of why and how BCM&CC should fundraise, the Plan also includes a timeline (9 to 24 months) with actions items for each step required:

<table>
<thead>
<tr>
<th>Process</th>
<th>One-Time Activities</th>
<th>On-Going Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brainstorming &amp; Strategy</td>
<td>Review and revise Strategic Plan</td>
<td>Execute Strategic Plan</td>
</tr>
<tr>
<td></td>
<td>Form Leadership Team</td>
<td>Expand Leadership Team</td>
</tr>
<tr>
<td>Prospect Research &amp; ID</td>
<td>Set up Prospect database</td>
<td>Prospect research and identification</td>
</tr>
<tr>
<td></td>
<td>Compile initial Prospect list</td>
<td>Continue to add information into database</td>
</tr>
<tr>
<td>Connectors</td>
<td>Identify initial Connectors</td>
<td>Identify Connectors with Leadership Team</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Expand number of Connectors</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cultivate Connectors</td>
</tr>
<tr>
<td>Communication</td>
<td>Configure database to send out materials</td>
<td>Develop outreach materials</td>
</tr>
<tr>
<td></td>
<td>Procure or implement email tracking system</td>
<td>Send outreach materials to Prospects</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Prospect email tracking</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Follow up and book meetings with Prospects</td>
</tr>
<tr>
<td>Leverage</td>
<td>Educate Leadership Team on best ways to give</td>
<td>Send <em>Best Ways to Give</em> communication materials out</td>
</tr>
<tr>
<td></td>
<td>Distribute appropriate materials to Leadership Team</td>
<td>Prospect email tracking</td>
</tr>
<tr>
<td>Alliance</td>
<td>Brainstorm session with BCM&amp;CC</td>
<td>Prospect cultivation and solicitation</td>
</tr>
<tr>
<td></td>
<td>Communication and integration set up</td>
<td>Proposals developed for Prospects</td>
</tr>
<tr>
<td>Close</td>
<td>Create Donor Agreement template</td>
<td>Prepare Leadership Team to close and secure gifts</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Stewardship</td>
</tr>
</tbody>
</table>

As a preliminary consideration prior to developing the capital/endowment case for support, it is recommended by FUNDING matters, that BCM&CC consider a plan to raise between $3.5 and $5 million which they feel should be feasible based upon their experience. FUNDING matters notes that while budgets for large campaigns ($10 million+) can be kept as low as 2% or 3% of the campaign goal, it is likely that for the BCM&CC campaign (as the Museum lacks an appropriate fundraising infrastructure in the beginning), the cost of the campaign will be closer to 10-12%. To ensure success, BCM&CC should review the recommendations from the Museum Feasibility Study and plan accordingly to retain a Fundraising Consultant to undertake a Major Gift Feasibility Study which will uncover funding and leadership opportunities based on the elements within the Museum and the opportunity to maintain a
sustainable future by creating an endowment fund for future needs. The Financial Feasibility Study will determine (1) if the appropriate course for the Museum is to conduct the campaign and (2) what level of funding is required and what campaign goal is needed to run a successful campaign. In general, the Fundraising Feasibility Study will take approximately three months to complete.

It is noted that within the Bruce County catchment region, there are (or have recently been) a number of multi-million dollar campaigns. The success of these campaigns indicate a positive philanthropic community in the region; but the success of a BCM&CC capital campaign is predicated on its ability to identify and engage with donors with specific interest in the arts and culture.

The full Fundraising Plan is attached in the Appendices of this Report in Section 8.
4.0 Recommendations and Rationales

4.1 Matching Mission and Values

In reviewing the input from the Community consultation and consolidating these views with the Provincial, Municipal and Museum (BCM&CC) strategic and economic planning goals discussed above, it is clear that any physical expansion of the facilities of the Museum must take into account the needs of potential Community partners and seek to integrate a greater "shared facilities" philosophy into the planning.

We know that "over the past half century, hundreds of researchers have spent thousands of hours and millions of dollars" and that "arts participation really does improve lives". From these studies, it is clear that participating in arts activities helps to maintain the health and quality of life for older adults, that arts participation in early childhood promotes social and emotional development, and that student participation in structured arts activities enhances cognitive abilities and social skills that support learning such as memory, problem-solving and communications.20

From the Ontario Museum studies noted earlier in this Report, we also know that the average museum in Ontario has 4 community volunteers for every paid employee21 and that we should be seeking to build a virtual volunteer network across the County in achieving BCM&CC goals. In addition, we know that school training in the cultural industries from art shows to museum internships expands the skill sets of young people and provides new paths and options for careers.

We know that in the 21st century community dialogue is about "their voice in our house, rather than our interpretation of their voice". In considering the requirements of any new Museum/Archives facility, it will be imperative to embrace this direction and accommodate this goal.

4.2 Recommendations

4.2.1 New Archives Building

It is our primary recommendation to build a new Archives building adjacent to, and connected with, the BCM&CC.

For all of the reasons noted above, we are recommending an Archival facility to meet the needs of the County for 15+ years, together with the integration of new public spaces specifically designed to allow heritage awareness and training of students, seniors, and participation from community organizations across the County.

The Five Year Action Plan: Business 22 identifies the promotion of local career opportunities to young people in high school and partnering with educational institutions to offer internships and co-op opportunities in Bruce County; these are two areas where BCM&CC already has experience and could expand its offerings if additional space can be identified. Of particular importance to the Museum is the creation of an opportunity to engage primary school children in heritage protection and development heritage education programs. This is particularly important for the empowerment of these students to identify and claim their own histories, their families' histories, their communities' histories, both the tangible and intangible heritage elements of who they are within the fabric of Bruce County and our global community.

Level 1 has two distinct areas each segregated and secured. The new public facilities includes a Community Voices Gallery designed to host self-generated poster exhibitions by students, community groups and others, and two classrooms -- one with a heritage study focus and one with a virtual museum focus. Here students, depending on grade and curriculum needs, will learn to handle and respect Archival and Museum materials, to do primary research, and to write up that research for either printing or digital presentation. These new public facilities would provide a vehicle to host school children during school days and adult programs evenings with the same goals. Every individual and family in Bruce has a biography which contributes to the mosaic of Bruce and the new Community Voice facilities will seek to link and engage Community populations via the internet across the County, not with just a website but a channel for bi-directional communications potentially driven by volunteers and led by Museum/Archives staff.

The space is also suitable for rental by community groups expanding the revenue potential for BCM&CC while providing the Community with cost effect space to host receptions, meetings, and poster shows. The space is also suitable for potential County tourism programs which could link Bruce County tourism events with visitors to the Museum who are already committed seekers and community program consumers, thus leveraging the attendance of the Museum with other cultural event opportunities across the County.

22 Bruce County Economic Development Strategic Plan 2017-2021, p. 45.
We believe this approach does not just secure participation from other organizations (School Board, Recreation Department, Senior Living Organizations and Heritage Groups) with a dedicated space for them to express themselves but it allows the Museum/Archives to be less Southampton-Centric.

In addition to the public facilities on Level 1, the Archival holdings of Bruce County will be hosted on this floor with significantly improved collections handling facilities. The two spaces, public and restricted, do NOT overlap; and due to this segregation, it is possible to make the community spaces available with extended building hours by physically segregating the Archives space from the Community Gallery. In this way, the facility could be used not just 10 hours a day, five days a week but potentially 14 hours a day and seven days a week.

Level 1 has washrooms and cloak rooms to allow for receptions and evening programs when the rest of the building is locked down.
Level 2 is dedicated to the utilization of the Archives assets. There are offices for the Archivist and the Assistant Archivist as well space for the Archival Volunteers. There is a large research room where Archival material and general Archival reference may be used by the public and a restricted Special Projects Room to be used by staff. Level 2 also has lockers for visitors and its own washrooms for staff and visitors using the Archives.

Many of the rooms could have glass walls to both allow the staff to monitor the Research Room and to provide a sense of space. It is suggested the Architect could include nice office windows with views of the lake, appropriately filtered for UV.

The space is provided with an elevator to both allow visitors, including those with mobility challenges to access the space, but also to allow staff to bring material from Holding to the Special Projects Room; this room is an enhanced security room where material requested by researchers could be held until required in the Research Room.

There are two options for locating the new Archives facility. The selection depends on the availability of land for acquisition and Client preference. Both options would have adjacent parking and would accommodate loading dock requirements. Both offer a view of the lake for staff and visitors while ensuring a black box for the holdings areas.

Option 1 may be best for working with the students of GC Huston Public School, with the easier access for loading and greater potential for evening and weekend parking.

Option 2 may be best if there is a desire to create a post-secondary Academy in Southampton, perhaps with a First Nations Heritage focus. This option speaks to the ambition of the Economic Development Study to attract a post-secondary school to the community where access to the BCM&CC collections and expertise would be of significant and unique value. Such an association could assist in attracting such potential partners as Trent University's Indigenous Studies Program or its First Peoples House of Learning initiative.

With either option, there would be a direct physical link with the primary Museum facility to allow a visitor flow between Galleries and Archives.

---

23 Bruce County Economic Development Strategic Plan 2017-2021, p. 27.
LEVEL 2

ARCHIVAL STORAGE (open to below)

EXPANSION SPACE OVER ENTRY
275 sf

MECHANICAL
500 sf

SPECIAL PROJECTS ROOM
500 sf

ARCHIVIST ASSISTANT
250 sf

ARCHIVAL VOLUNTEERS
470 sf

ARCHIVIST OFFICE
320 sf

RESEARCH ROOM & MICROFILM
1425 sq ft

glass walls

cost check

glass walls

elevator

glass walls

glass walls

elevator
4.2.2 Repurposing of Existing Spaces

The relocation of the Archives to a new facility would free a significant amount of space in the existing Museum facility.

Level 1

As noted in the 2016 Accommodation Study, due to the shortage of designated non-artifact storage space, BCM&CC has had to use everything from washrooms to mechanical services spaces and even the loading dock for the storage of program elements, exhibit furniture and other non-artifact needs. One of the benefits of the proposal for the New Archives Facility and the reuse of space made available in the existing building by the move, is that most of these elements and non-artifact material currently in BCM&CC, may be centralized in a designated non-artifact storage space on level 1 (Room 127). This change alone opens up space in Room 144 for the necessary Landscape Maintenance equipment, moves furniture from the loading dock, and returns the Garage Room and the Clean Workshops back to their original purposes. It also creates the opportunity to remove an unused shower on Level 2 currently hosting interpreter costumes to hold much needed Emergency Supplies. Ultimately the goal would be to move all furniture off-site to the proposed off-site Collection Management Facility's Exhibit Prop Storage unit (650 sf) as no furniture has an unplanned immediate access need as all such needs evolve from reuse of exhibit props and cases, or recycle furniture as part of a program planned for months.

Level 2

The Consultants believe that the freed-up space in the existing BCM&CC provides the opportunity to increase public program space with the creation of a dedicated Discovery Centre (Rooms 222 and 223) adjacent to the Theater for lectures and presentation and access to the rear door to the deck and historic houses (and the new Archives). This expanded and proposed dedicated gallery space provides greater opportunity for serving the family in multigenerational and exploratory hands-on learning.

This approach preserved the popular and necessary Dundas and Sterling Meeting rooms for community and staff use. The proposed plan thus maintains the facility rental spaces (Dundas and Sterling) with the addition of the proposed Discovery Centre to increase the opportunity for rental spaces as needed.

This repurposing respects and retains the existing Theatre and Green Room, reestablishes washrooms on this floor, and consolidates staff functions on the third level.

Level 3

Naturally the proposed move of the Archives to the New Archives building offers the greatest opportunity to repurpose space in the Existing Facility. It is proposed that the former Archives holding area is converted to a space for Museum small-size collections holding, perhaps utilizing existing compacted shelving. This expansion of on-site storage could provide an additional 5+ years of storage for collection growth.

As well, the adjacent repurposing of the Research Room and Office allows staff to be consolidated on one floor to enhance opportunity for greater sharing of ideas and team work.
BRUCE COUNTY MUSEUM & CULTURAL CENTRE
Level 1 PROPOSED CONDITIONS
BRUCE COUNTY MUSEUM & CULTURAL CENTRE
Level 3 PROPOSED CONDITIONS
4.2.3 Off-Site Collections Holding

Longer term, 5-15 years, the County, perhaps in association with a neighbouring county or counties, will require the development of an Off-Site Collections Management Facility. The purpose of this facility is the long-term, secure and climatic control retention of both Archival and Museum collections which are not the basis of any current exhibition or research program. The facility would also host space for the storage of exhibition furniture and props not of immediate need but valuable assets retained for future exhibitions and program purposes.

The facility is assumed as a double height building although initially only the ground floor may be occupied. The posts and foundations would be designed and built assuming a fully loaded second floor, thus amortizing the capital investment over a longer period.
5.0 Space Utilization Analysis

When we compare the current space utilization program of BCM&CC including the space temporarily used at the Walkerton Off-Site Storage, with the proposed repurposed Museum with the addition of the new Archives Facility, we see that this plan addresses the near- and mid-term accommodation challenges addressed in the 2016 Accommodation Study.

5.1 Analysis of Changes in Space Utilization

Based on the above recommendation the Accommodation and Utilization Plan for the BCM&CC significantly changes with increases in collection and archival storage, public program space, gallery space and revenue generation space. The recommended areas are noted below.

<table>
<thead>
<tr>
<th>Current Space Utilization Program</th>
<th>Repurposed Space Utilization Program In Existing Facility</th>
</tr>
</thead>
<tbody>
<tr>
<td>8383 Public Area without Collections</td>
<td>8058 Public Area without Collections</td>
</tr>
<tr>
<td>13199 Public Area with Collections</td>
<td>13955 Public Area with Collections</td>
</tr>
<tr>
<td>3611 Private Area With Collections</td>
<td>3915 Private Area With Collections</td>
</tr>
<tr>
<td>6261 Private Area without Collections</td>
<td>5652 Private Area without Collections</td>
</tr>
<tr>
<td>1799 Building Service Areas</td>
<td>1674 Building Service Areas</td>
</tr>
<tr>
<td>NA Walls &amp; Misc Spaces</td>
<td>NA Walls &amp; Misc Spaces</td>
</tr>
<tr>
<td>33253</td>
<td>33254</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>New Archives Facility</th>
<th>New Off-Site Facility</th>
</tr>
</thead>
<tbody>
<tr>
<td>1221 Public Area without Collections</td>
<td>1100 Public Area without Collections</td>
</tr>
<tr>
<td>3945 Public Area with Collections</td>
<td>0 Public Area with Collections</td>
</tr>
<tr>
<td>4300 Private Area With Collections</td>
<td>6650 Private Area With Collections</td>
</tr>
<tr>
<td>1040 Private Area without Collections</td>
<td>895 Private Area without Collections</td>
</tr>
<tr>
<td>2694 Service Areas (incl circulation)</td>
<td>1455 Building Service Areas</td>
</tr>
<tr>
<td>994 Walls (~7%)</td>
<td>681 Wall thicknesses (~7%)</td>
</tr>
<tr>
<td>14194</td>
<td>10781</td>
</tr>
</tbody>
</table>

Some of the changes in the existing facility are recovery of existing spaces for their original purposes; clearly much of it is the net gain in public and non-public space from the total program stems from the construction of potentially two new facilities. Clearly the plan cannot increase the physical space within the existing building but simply propose a better use of the spaces available. However, the proposed New Archives and new Off-Site Facilities add approximately 24,000 sf to the BCM&CC, an approximately 60% increase in the total occupied space for the museum, archives and their programs.
The current temporary storage in the Walkerton Off-Site Storage represents a potential storage area of 1334 sf although it is unclear how much of room #2 is used as it recorded that it currently contains only a loom. Many of the items currently in Off-Site Storage are not suitable for the new small collections storage area (1774 sf) and would have to be accommodated in the general collections storage area in the existing facility. Some of the space created by moving small finds to the new compacted storage in the existing Archives could be used to accommodate these larger objects but it will put pressure on the large artifact storage area.

The physical program of the Study’s recommendations is scalable. For example, if no partner county or Bruce County Departmental partner is found to share the off-site facility, the facility could be cut in half and constructed in full with one future expansion over a 20 year program as need arises. The same is true for the New Archives. Should the County feel that the project is too ambitious, the new Archives Facility could be built entirely on one floor and the Community Voice Gallery and linkage study rooms could be deferred or canceled. The net gain from the Archives would be retained. As well, the current plan provides an option for a second archives storage floor in the new Archives Facility should it become desired, a potential 2000-2500 additional sf of archival collection storage, not counted or costed in the current Study.

When comparing space utilization by BCM&CC between existing 2016 facilities and available space after implementation of the proposed new facilities, the net gains are approximately as follows:

<table>
<thead>
<tr>
<th>Space</th>
<th>Increases With New Archives Facility and Repurposed Spaces</th>
<th>With New Off-Site Storage Facility (Additional)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Additional Gallery Space</td>
<td>1995</td>
<td>0</td>
</tr>
<tr>
<td>Additional Archival Space</td>
<td>6400</td>
<td>1500</td>
</tr>
<tr>
<td>Additional Collection Space</td>
<td>1744</td>
<td>1500</td>
</tr>
<tr>
<td>Additional Public Program Space</td>
<td>430</td>
<td>650 (storage)</td>
</tr>
<tr>
<td>Additional Administrative Space</td>
<td>1040</td>
<td>245</td>
</tr>
<tr>
<td>Additional Revenue Space</td>
<td>1030</td>
<td>3000</td>
</tr>
</tbody>
</table>

Note: Some spaces are counted in two lines, as they have dual usage.
6.0 Budgets

6.1 Capital Budget Projections

When considering the capital budget for the entire program including all renovations to the existing facility, the construction of a new Archives Facility and the eventual construction of an off-site Collections Management Facility, and the fit-out of all spaces, the total projected price is approximately $7.9 million.

<table>
<thead>
<tr>
<th>Capital Program Elements</th>
<th>SF</th>
<th>$/SF</th>
<th>Estimate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Archives New Building</td>
<td>14194</td>
<td>$135</td>
<td>$1,916,190</td>
</tr>
<tr>
<td>Renovations to Existing Archives</td>
<td>5000</td>
<td>$150</td>
<td>$750,000</td>
</tr>
<tr>
<td>Projected Estimate for Fit-Out New Archives (incl Compacted Storage)</td>
<td></td>
<td></td>
<td>$450,000</td>
</tr>
<tr>
<td>Projected Estimate for Fit-Out New Community Gallery</td>
<td></td>
<td></td>
<td>$250,000</td>
</tr>
<tr>
<td>Projected Architectural and Contractor Fees</td>
<td>19000</td>
<td>$50</td>
<td>$950,000</td>
</tr>
<tr>
<td>Projected Fundraising Financial Study</td>
<td></td>
<td></td>
<td>$30,000</td>
</tr>
<tr>
<td>Projected Estimate Fundraising Costs</td>
<td></td>
<td></td>
<td>$350,000</td>
</tr>
<tr>
<td>Contingencies (10% Planning, 15% Construction, 10% Fit Out)</td>
<td></td>
<td></td>
<td>$602,929</td>
</tr>
<tr>
<td><strong>Total New Archives and Renovation to Existing</strong></td>
<td></td>
<td></td>
<td><strong>$5,299,119</strong></td>
</tr>
<tr>
<td>New Off Site Collections Management Facility</td>
<td>10100</td>
<td>$135</td>
<td>$1,363,500</td>
</tr>
<tr>
<td>Projected Architectural and Contractor Fees</td>
<td>10100</td>
<td>$50</td>
<td>$505,000</td>
</tr>
<tr>
<td>Fit Out Off Site Space (including double height racking)</td>
<td></td>
<td></td>
<td>$450,000</td>
</tr>
<tr>
<td>Contingencies (10% Planning, 15% Construction, 10% Fit Out)</td>
<td></td>
<td></td>
<td>$300,025</td>
</tr>
<tr>
<td><strong>Total Off-Site Collections Facility</strong></td>
<td></td>
<td></td>
<td><strong>$2,618,525</strong></td>
</tr>
<tr>
<td><strong>Total New Facilities Projects</strong></td>
<td></td>
<td></td>
<td><strong>$7,917,644</strong></td>
</tr>
</tbody>
</table>

Notes:
1) Exclusive of Land Costs
2) Exclusive of Inflation, or Costs of Financing
3) Exclusive of Project Management Costs
4) Exclusive of Electrical Substation Costs
5) Exclusive of Landscaping, Parking, Exterior Lighting, Security, Utilities, Site Preparation, site studies, or Permits
We have made some assumptions on the funding structure of the proposed program. It is not advised by a Financial Fundraising Study or agreement with any potential funding partners. It is our best estimate of a potential funding model which will have to be tested once the program is approved.

In the potential funding program model, we note the heavy dependence on the success of fundraising and the early support from the County Capital Budget. Our estimate of Provincial and Federal government grants is just an estimate based on the quality of the cultural investment and existing funding programs.

<table>
<thead>
<tr>
<th>New Archives and Renovations</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Archives Trust</td>
<td>$500,000</td>
<td>9.44%</td>
</tr>
<tr>
<td>Capital Projects Bruce County</td>
<td>$1,200,000</td>
<td>22.65%</td>
</tr>
<tr>
<td>Fundraising</td>
<td>$3,000,000</td>
<td>56.61%</td>
</tr>
<tr>
<td>Government Grants</td>
<td>$600,000</td>
<td>11.32%</td>
</tr>
<tr>
<td>Total Budget</td>
<td>$5,299,119</td>
<td>100.02%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Off Site Storage</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Capital Projects Bruce County</td>
<td>$500,000</td>
<td>19.05%</td>
</tr>
<tr>
<td>Fundraising</td>
<td>$1,000,000</td>
<td>38.10%</td>
</tr>
<tr>
<td>Government Grants</td>
<td>$625,000</td>
<td>23.81%</td>
</tr>
<tr>
<td>County Partner (other county)</td>
<td>$500,000</td>
<td>19.05%</td>
</tr>
<tr>
<td>Total Budget</td>
<td>$2,625,000</td>
<td>100.00%</td>
</tr>
<tr>
<td>Total Program Budget</td>
<td>$7,924,119</td>
<td></td>
</tr>
</tbody>
</table>
6.2 Operating Budget Projections

The program assumes only two incremental FTE position in the archives building: one position operating as a facilitator for the activities on Level 1 and coordinating with users of the Community Voices Gallery and the second to provide maintenance for the facility (interior and exterior). There are operating assumptions made for passive electronic security monitoring and for general facility and landscape maintenance costs.

As well, when the Off-Site Facility is opened, it is assumed one additional position will be required to facilitate and coordinate the day-to-day activities of the facility; it is recommended that the same costs be recognized in its operations.

These investments represent extremely modest incremental operating expenses for staff but do represent on-going costs to maintain the value of the investment.

### Incremental Operating Budgets

<table>
<thead>
<tr>
<th>Operating Budgets</th>
<th>SF</th>
<th>$/SF</th>
<th>Estimate</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>The New Archives Facility</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Utilities (incremental for New Archives Only)</td>
<td>14194</td>
<td>$3.1</td>
<td>$43,608</td>
</tr>
<tr>
<td>Fire &amp; Security Monitoring (Electronic)</td>
<td></td>
<td></td>
<td>$2,760</td>
</tr>
<tr>
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Notes:
1) Exclusive of Public or Operational Program Costs
2) Exclusive of inflation, or Costs of Financing
7.0 Next Steps

The currently Feasibility Study has explored in detail the two approved options stemming from the original Accommodation Study 2016: a new Archives Facility and an Off-Site Collections Facility. The new Archives Facility is critical in addressing near-term archival collections pressure and providing opportunity for increased Museum collection storage, public program spaces, and general storage. The Off-Site Collections Management Facility is intended to provide mid-term and long-term collections (Museum and Archives) secured holding spaces.

In addition to these original goals, and based on the ambitions and strategic direction of the Museum, County, and Province, the opportunity provided by this Study also enabled the consideration of including the achievement of several additional strategic goals as part of the overall study.

The current study is an Accommodation Feasibility Study of concept spaces. Moving forward, there are several critical steps to be achieved by the County.

1. A Financial Feasibility Study by a respected fundraising firm to test the assumptions in this Report and give the County comfort in achieving the goals proposed. Funding for this Study and the running of a campaign are included in the costs of the overall program presented here.

2. Selecting the site option, north or south of the existing BCM&CC, and securing the land and permits to build (land costs are not identified in this Study).

3. Securing an architect to develop the concepts of the two new facilities presented in this Report and the extent of renovations to the existing structure. These costs are included in the overall financial program presented here.

4. Securing County funding, and beginning the process to secure Government Funding grants.

The current Feasibility Study is ambitious but not aggressively so, given the tremendous opportunities for the Museum and its programs to make significant and material contributions to the Region as envisioned in the Economic Study, the Strategic Planning by County and Province and the growth of Bruce County as an economic destination and not simply as an agricultural or recreational County.
8.0 Appendices

8.1 FUNDING matters inc.: Fundraising Plan

BRUCE COUNTY MUSEUM & CULTURAL CENTRE

FUNDRAISING PLAN

For the

BCM&CC Capital Campaign

Prepared by

FUNDING matters Inc.

Museum Planning Partners
studioARTISTRY
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1.0 INTRODUCTION

The Fundraising Plan for the Capital Campaign ("campaign") in support of the Bruce County Museum & Cultural Centre ("BCM&CC") outlines principles of Major Gift fundraising, determines success factors for achieving the campaign goal, and defines roles and responsibilities of volunteer leadership throughout the campaign.

This document will elaborate upon the procedures, policies, activities, cost and organizational structure through which BCM&CC will attract the funds needed to achieve its campaign goal. Not only does this document clearly outline the theoretical background of why and how BCM&CC should fundraise, the plan also incorporates the FUNDING matters Inc. 7 Step Power Donor Solution, which guides BCM&CC step by step to create a successful fundraising initiative. Appendix I contains an activities chart detailing each step.

The level of success achieved by the campaign will depend on the persuasiveness with which the case can be presented to potential contributors. The most effective process is face-to-face solicitation by campaign volunteers, who are personally committed to BCM&CC, and who are properly prepared to make the calls. To produce optimum results, limited personnel resources must be used efficiently.

Simple procedures and a clear assignment of responsibilities will contribute to the campaign's efficiency. Inevitably, opportunities will arise that will dictate modifications to this Fundraising Plan as the campaign unfolds. Planning is effective if it provides for a flexible response to changing conditions. This Fundraising Plan is intended as a general guide to action as well as a summary of campaign policies, which may evolve as circumstances change. Campaign volunteers are encouraged to refer to this plan whenever strategic or procedural questions arise.

The 14 interviews conducted by Museum Planning Partners (MPP) covered some elements of the preparation phase of a Capital Campaign. For instance, there is sufficient insight from respondents to indicate further stakeholder engagement to determine the appropriate leadership for a BCM&CC Capital Campaign. BCM&CC should consider engaging the same 14 individuals in preparation for the Capital Campaign. MPP’s interviews were an important initial step to understanding public support for a campaign and perspectives on priority funding areas. What follows is a comprehensive Fundraising Plan that BCM&CC will need to comprehend and then implement to ensure a successful campaign.
2.0

STEP I: BRAINSTORMING & STRATEGY

BCM&CC’s path to creating a successful campaign starts through brainstorming and strategy. Major and planned gifts are the result of a comprehensive strategic plan and the long-term cultivation of donors. To ensure a continuous stream of major and planned gifts to BCM&CC, BCM&CC will need to identify, cultivate and solicit high net worth donors. The initial activity in this stage is to conduct a Planning Study, which will take approximately three months. The Planning Study will focus on factors that will directly affect the giving of major and planned gifts to BCM&CC. Through the Planning Study, BCM&CC will determine the campaign goal, create a draft Case for Support and the campaign opportunities that are connected to the draft Case for Support. When the draft Case for Support has been sufficiently reviewed internally, it will be taken to selected stakeholders. In addition, there is a set of specific interview questions that can have quantifiable. Appendix II includes these sample questions for use in the interviews to be conducted during a Planning Study. These stakeholders should be engaged through an in person one on one interview process where the stakeholders will review the draft Case for Support. Through these interviews BCM&CC will be able to determine the public image, the likely pool of campaign leadership and hone the draft Case for Support.

2.1 FAVORABLE PUBLIC IMAGE

A favourable public image is a prerequisite for any organization seeking funds. In order to ascertain whether or not the public has a favourable public image of BCM&CC, it will need to conduct interviews during a Planning Study which will show the level of support from public and private sector respondents.

It is imperative that BCM&CC follow a proven process to raise the funds necessary to facilitate a successful campaign laid out in this fundraising plan, which will thus provide the money which will be need to complete the archives.

2.2 A STRONG CASE FOR SUPPORT

The primary objective of the Case for Support is to convince prospective donors that they are investing in an outstanding cause. The Case for Support outlines in detail the campaign's goals, challenges and proposed solutions. The Case for Support will effectively and persuasively present BCM&CC’s needs and show the benefits of supporting a campaign. Pride and satisfaction will result from prospective donors’ knowledge that their pledges will support a Museum that promotes fun and accessibility for visitors. The knowledge that BCM&CC takes a client-centered and interactive approach to its programming in a friendly and welcoming environment, focuses on providing interesting and memorable experiences for visitors, and strives to ensure that all educational experiences are exciting and memorable for participants will help prospective donors understand and connect with the campaign.

2.3 LEADERS OF AFFLUENCE AND INFLUENCE

Individual volunteers possessing both power and wealth are the most critical factor in determining the successful outcome of the campaign. They must be willing and able to inspire others of similar stature and means to accomplish the face-to-face solicitation of all prospective donors.
2.4 A REALISTIC, DEADLINE-DRIVEN TIMETABLE

A sample timeline includes the following activities: three months for a Planning Study; two months for prospect identification and finalizing the Case for Support; and 9-24 months for campaign implementation. The timeline may change in response to changing conditions, however adherence to pre-determined deadlines requires attention and diligent engagement by the fundraising committee. Further breakdown of the process to conduct a Planning Study and the subsequent campaign are in the final section of this report.

2.5 CLEAR OBJECTIVES

All successful fundraising campaigns require clear and realistic objectives. The primary objective of the campaign is to raise the necessary funds to complete the campaign goal. To achieve this goal, the campaign must focus on the priorities that will be identified in the Planning Study and deliver on promises based on funding milestones. Emphasis on the campaign goal is important for visibility and promotion. However, as a practical matter, it often makes the process of reaching that goal vague and uncertain. Establishing milestones and specific goals strengthen the campaign by showing volunteers what must be done in more achievable and manageable terms.

2.6 ACTION ITEMS

**REVIEW EXISTING FUNDRAISING DOCUMENTS:**

BCM&CC will need to review all of its previous fundraising and campaign materials to prepare for the internal brainstorming and Planning Study.

**BRAINSTORMING AND STRATEGY SESSION:**

BCM&CC will flesh out the basics for the campaign by discussing ideas and working creatively define clear campaign objectives, realistic deadlines, identify viable prospects and basic information necessary to explain a case for the campaign.
3.0
STEP II: PROSPECT RESEARCH & IDENTIFICATION

Through proactive research, BCM&CC will discover valuable prospects and collect available information about their finances, values, interests and philanthropic activities. Prospective donors capable of contributing gifts of this magnitude must be identified and researched. In addition, a prospect review committee must determine how much to solicit from each prospect.

3.1 PROSPECT REVIEW AND EVALUATION

Prospect Review is a process by which a committee of volunteers considers the specific sources of funds to be raised during the campaign. Through a review of prospective donors, the committee attempts to match the gifts that are required with those who will be asked to donate them.

Prospect review is a study of each prospect's potential, the amount they could give if sufficiently interested and properly prepared. Prospect review is undertaken in order to establish suggested levels of giving - levels that will ensure the success of the campaign.

Giving is voluntary. It is an opportunity to support a cause that the individual donor believes to be of value. Prospect review is a part of this voluntary process, providing a "think about" donation figure for the prospect to consider. The "think about" figure is in proportion to the giving of others, and in proportion to the individual's ability to give.

Without careful planning and a comprehensive evaluation of all potential donors, there is no road map to guide the volunteers. The campaign must be "won on paper" before solicitation begins. Otherwise, volunteers will work diligently, devote countless hours to the campaign, and still fall short of the goal. Prospect review directs each volunteer to specific levels of potential support, thereby maximizing the likelihood of success.

Prospect review also plays an important role in the development of specific solicitation strategies. The process helps to identify:

- Linkages to the organization and to the campaign.
- The aspects of the case that are of the greatest interest.
- Individuals/ volunteers who would likely have the most influence with the prospect.

The dialogue that occurs during prospect review is also helpful in identifying new prospects. It identifies those potential donors about whom further research is needed, those who need to be cultivated, and those who could be approached for leadership roles in the campaign. The approach to prospect review should be consistent throughout the campaign. Consideration should always be directed toward the amount a prospect could invest over a number of years provided he or she is asked by the right person and is sufficiently interested in advancing the values of the BCM&CC.
One of the dangers in a capital campaign is the tendency of interested donors to give at levels that are consistent with their support or past giving standards. The magnitude of the campaign goal makes it imperative that all potential donors consider participating at a scale greater than their previous giving levels. Effective prospect review will raise the sights of all who participate and will ensure that giving is indeed proportionate to the objective.

Sequential solicitation is another aspect of successful campaigns for which the prospect review committee is responsible. The best prospects for the largest gifts should be canvassed at the beginning of the campaign. Success at the outset will influence all subsequent levels of giving. The prospect review committee will identify these leadership prospects and will develop effective strategies for approaching them.

Finally, most people want to know what is expected of them both in terms of what a proportionate gift might be and in terms of what others are being asked to consider. Prospect review is the most appropriate way of determining an appropriate and defensible response to this question.

3.2 ACTION ITEMS

PROSPECT IDENTIFICATION:
Develop a prospect list of individuals, primarily high-net-worth individuals, with a giving capacity based on earnings, assets and connections to the Leadership Committee.

BROADEN SEARCH:
Broaden prospect list to include corporations, foundations, and grants and identify what connections exist through the Leadership Committee.
4.0

STEP III: CONNECTORS

The Leadership Committee will identify connectors. Connectors are individuals who build bridges to BCM&CC’s prospects. Connectors have, in some way, an association or relationship with BCM&CC and prospects, and may even be able to influence them. The Leadership Committee will naturally identify connectors through meetings and engagement with prospects. Please note that the “Leadership Committee” concept is defined below in section 4.3.

4.1 LEADERSHIP AND OWNERSHIP

No other factor will influence the degree of success of the campaign as much as leadership. Therefore, the entire campaign structure is designed to maximize the BCM&CC volunteer resources and to ensure those who are able and willing to take a position of leadership can do so with a high likelihood of success. This section will act as an illustration of the type of leadership that may be involved in the campaign. Appendix IV contains a sample campaign structure illustration.

4.2 STEERING COMMITTEE

Organizations starting campaigns frequently establish a Steering Committee and Leadership Committee to support the campaign. The BCM&CC should establish a Steering Committee that reports directly to BCM&CC Board of Directors. This Committee should consist of members of the BCM&CC Board of Directors (i.e. Chair and Treasurer) and the Executive Director, representatives from prominent corporations throughout Bruce County, and individuals who have a relationship or connection with BCM&CC. The Steering Committee is responsible for overseeing the campaign and carrying out the plan according to the timetable. Their input is particularly important in the early stages of strategy development especially as it relates to the enlistment of key volunteers and the identification of the leadership gift prospects.

The following lists the major responsibilities of the Steering Committee, as it relates to the campaign:

- Approve fundraising programs and concepts prior to implementation by an internal or external entity as the Development Office.
- Assist with the identification and evaluation of all prospects.
- Assist with the solicitation of key leadership donors as appropriate.
- Assist with the recruitment of key volunteers as appropriate.
- Approve policies for donor recognition.
- Approve the campaign Communications Plan.
- Report to the Board of Directors on the progress of the campaign.
- Report on activities dealing with public relations.
4.3 LEADERSHIP COMMITTEE

The Leadership Committee usually consists of members recruited as part of the campaign leadership. The Leadership Committee members are usually mostly volunteers. The responsibilities of the Leadership Committee shall include the following:

- To take on the leadership role in the development of the capital campaign and related fundraising initiatives.
- To provide input and advice on the campaign.
- To actively participate in campaign cultivation, solicitation and recognition activities.
- To participate in prospect review meetings as needed.
- To report on a quarterly basis to the Steering Committee on the activities and progress of the capital campaign.
- To take on the stewardship of the capital campaign.
- To provide communications/public relations support for capital campaign initiatives.

4.4 DEVELOPMENT OFFICE

In order to meet the overall objective for the campaign for the BCM&CC of obtaining the fundraising goal, the Museum will need to hire an internal or external entity as the Development Office. The Development Office will be in charge of the fundraising aspects of the campaign. To achieve this, the Development Office will need to continue identifying prospects and conducting the necessary research, prepare the fundraising materials, and continue on-going communications with all campaign leadership, senior volunteers and committees under the leadership of the Steering Committee.

The mandate of the Development Office is to provide the required strategic direction, support and fundraising coordination to ensure that the campaign achieves its objectives in providing funds for operations and capital needs. This includes the implementation of the strategies contained within the campaign plan; and the necessary day-to-day activity management and financial controls for an efficient and effective overall operation.

4.5 HONORARY CAMPAIGN CHAIR(S)

Frequently, fundraising campaigns also have Honorary Campaign Chair(s). The Honorary Campaign Chairs’ primary function is to lend his/her name and credibility to the campaign. He/she may take an active role in campaign activities such as: leadership recruitment, canvassing key individuals, corporations, and/or foundations on behalf of the campaign.

The Honorary Chair should attend volunteer meetings when possible and where appropriate may be asked to speak at campaign leadership meetings. He/she will receive all reports that are circulated in connection with the campaign.

4.6 CAMPAIGN CHAIR(S)

Similarly, campaigns also have Campaign Chair(s). The Campaign Chair heads the Leadership Committee and is the Chief Executive Officer of the Campaign. Acting with the authority of the BCM&CC, through the Development Office, the Campaign Chair’s primary function is to provide overall leadership and to manage the Campaign process through the members of the Leadership Committee. The Campaign Chair’s duties include the following:

- To take overall responsibility to ensure that the overall goal of the campaign is met.
- To solicit the top-level prospects.
• To ensure that members of the Leadership Committee have made their gift to the Campaign prior to the recruitment of their volunteer teams and the solicitation of their prospects.
• To participate in Prospect Review meetings as needed and to report on the progress of the Campaign to the Steering Committee at appropriate intervals.
• To chair meetings of the Leadership Committee.
• Where appropriate, to speak at Campaign leadership meetings and Campaign events.

4.7 COMMITTEES

The Prospect Review Committee is a committee made up of members of the Leadership Committee and selected individuals who consider, based on research and identification, the donation amount to be solicited from prospects during the campaign.

Other committees to consider forming include the Building Committee and the Professional Advisor Committee. The Professional Advisor Committee could be divided into subsections, such as Accountants, Financial Advisors, and Lawyers.

4.8 MUNICIPAL, PROVINCIAL AND FEDERAL GOVERNMENT

All levels of government must be involved in the campaign, as funders and with elected members supporting the campaign as honorary patrons. Their presence will add credibility and validity to the fundraising process.

4.9 ACTION ITEMS

IDENTIFY CONNECTORS:

Connectors will help BCM&CC to introduce new prospects to cultivate and solicit for campaign gifts.

LEADERSHIP COMMITTEE EXPANSION:

The Leadership Committee will grow the number of connectors to increase major and planned gift opportunities.
5.0
STEP IV: COMMUNICATION

BCM&CC will cultivate and solicit prospects. Communication materials will build prospects’ enthusiasm and commitment and motivate them to consider making a major or planned gift by showing the immediate and long-term impact of their gift. The Leadership Committee will present them with the Case for Support and other relevant materials that demonstrate the work being undertaken by BCM&CC and present a case for funding.

5.1 SUCCESSFULLY COMMUNICATING

To be successful, the campaign must obtain support at significant levels of giving from the community. Many prospects are accustomed to receiving top-calibre communications materials. Although people primarily make their decisions to support a campaign on the basis of the person who is soliciting their support, some will also judge the campaign’s worthiness from the contents of the campaign communications materials and activities, and the image they portray. The following Communications Plan includes publications that keep the community abreast of the developments regarding the campaign.

5.2 ACTION ITEMS

The Communications Plan provides a comprehensive and logical program of activities and materials to assist in the dissemination of information, and ultimately successful completion of the campaign. This plan is intended as a strategic guide to communicating the campaign messages to the key target audiences, thereby supporting the campaign leadership and volunteers in their efforts.

OBJECTIVES:

- To improve internal communications in regards to the campaign with council, staff, management and volunteers.
- To heighten awareness of the BCM&CC and its campaign within the community and the general public.
- To effectively use communications to assist with the solicitation of new donors and stewardship of present donors.

STRATEGIES:

- Campaign key message development.
- Campaign media relations guideline development.
- Development of campaign communications materials including: Case for Support, detailed funding proposals, letters of intent, campaign newsletter (4 per annum), interactive donor presentations and campaign notice board.
- Development of Gift Naming Opportunities.
**SUCCESS FACTORS:**

- Consultation with the Steering Committee and BCM&CC on material development.

- Final review and approval of all communications and media documents from the campaign prior to their distribution will ensure that all messaging is consistent with this Communication Plan, its objectives and strategies.
6.0

STEP V: LEVERAGE

In order to obtain major and planned gifts BCM&CC will use leverage in engaging prospects to understand the benefits and impact of major or planned gifts. There are two ways to use leverage to cultivate prospects. The first is the ability to discuss relevant estate, financial and taxation planning with them. The second is utilizing the Leadership Committee’s relationships and connections in prospect engagement. At this stage, BCM&CC invites the prospect to use the Best Ways to Give web app to explore the idea of giving a gift.

6.1 BEST WAYS TO GIVE APPLICATION

Developed by FUNDING matters Inc., the Best Ways to Give illustrates how to structure major and planned gifts. Best Ways to Give allows individuals, in the privacy of their home, to interact with BCM&CC’s website and run through multiple major and planned giving donation scenarios.

The approach optimizes the donation section of BCM&CC’s website to guide individuals through the process of formulating a gift that is tailored to their unique financial situation.

The take-away message for users is making a gift to BCM&CC is achievable. Donors will likely learn a few new things about how major gift and planned giving donations through dynamic and easy to understand illustrations. Integrating the Best Ways to Give application into BCM&CC’s website will increase donor ROI.

6.2 ACTION ITEMS

The Leadership Committee should be prepared to discuss the financial landscape impacting potential donors.

COMMUNICATION MATERIALS:

BCM&CC will send out materials to prospects, directing them to BCM&CC’s Best Ways to Give web application. Materials will be in the form of emails informing supporters about the Best Ways to Give web app.

TRACK ACTIVITIES:

BCM&CC will track these emails and will prompt the Leadership Committee to follow up with prospects.

FOLLOW-UP:

BCM&CC and the Leadership Committee should follow up with the prospects that receive the emails. The Leadership Committee will utilize their relationships to engage prospects.
7.0

STEP VI: ALLIANCE

Alliance is the relationship between the Leadership Committee and prospects. Major and planned gifts from total strangers are wonderful but exceedingly rare. BCM&CC will develop deeper relationships with prospects through genuine and coordinated engagement. The result of these efforts is soliciting prospects for major and planned gifts.

7.1 ACTION ITEMS

PEER SOLICITATION:

In order to ask for funds, there needs to be credible volunteers who have already made a thoughtful commitment at the level similar to that which they are asking of others.

THE RIGHT VOLUNTEER:

People give to people. Every effort should be made to enlist the most appropriate volunteers at all levels of the campaign. In most cases, the right volunteer will be the canvasser who is deemed to have the most influence with the potential donor.

GIVING BEFORE ASKING:

Every volunteer will be expected to make his or her own commitment before canvassing another. The enlisting volunteer is usually responsible for ensuring this happens.

PERSONAL SOLICITATION:

All solicitation and enlistment should be done on a face-to-face basis.

REALISTIC REQUESTS:

No one can presume to tell another what he or she should give. "Think about" figures are not quotas; they are realistic appraisals of giving potential for prospects to consider.

CAREFUL ASSIGNMENTS:

Volunteers should agree to solicit a prospect only if they believe the "think about" figure is reasonable, and that they are the most appropriate person to ask for the maximum amount.

THE TEAM APPROACH:

The team approach will substantially increase the chance of success. Teamwork bolsters confidence, ensures the correct amount is asked for, and demonstrates commitment. The team approach is preferred because it ensures that "the ask"
will be made and that it will be made at the agreed upon level. It also tends to increase the volunteer’s level of comfort in soliciting gifts which can ultimately increase their effectiveness and willingness to make the calls.

The team approach also enables each member of the team to monitor the progress of the meeting and to adjust the strategy accordingly. Through observation and sensitivity, the team members can work together to reinforce one another’s comments and to handle any objections or misconceptions that may arise.

The ideal canvassing team includes a campaign leader, a senior volunteer, and a Development Office staff member. Experience has shown that this combination of influence and knowledge is the most effective in securing leadership gifts. Such a team combines strengths that cannot be found in any other combination of canvassers. The volunteers, with their influence and commitment and passion, can open doors that would otherwise remain closed; while the Development Office staff member is the "expert witness", who with their experience, can explain the case for support in a compelling and credible way and the rationale for giving at the requested amount.

For these reasons, the optimum team consists of three canvassers. The dynamics of the process determine that any additional participants contribute little in the way of additional benefit, but their presence can undermine the intimacy of the smaller group meeting. The presence of more than three canvassers could be overwhelming and intimidating for a prospective donor.

Teams of three make the most effective calls. The team approach, therefore, should be used whenever possible during a campaign.

**EFFICIENT USE OF LEADERSHIP:**

Prospects will be assigned to Divisions based on their giving potential, not on their business classification (i.e. corporate/individual). Volunteers will be assigned to groups where they will be most effective. A volunteer should be capable of donating at the level of the Division they are assigned to. Peer solicitation means big donors canvass big gifts. A $50,000 donor, therefore, will be assigned to canvass a peer at a similar gift level.

**FOLLOW-UP:**

Large gifts are secured through careful planning, thoughtful strategies and the persistence of committed volunteers.
8.0
STEP VII: CLOSE

BCM&CC’s ultimate goal is to raise funds through major and planned gifts. BCM&CC must close each donation ask by creating donor agreements, signed by the donor, and keep track to ensure each donation payment is received on time.

8.1 ACTION ITEMS

PREPARATION:
BCM&CC, the Leadership Committee and the connectors will need to prepare to present the best case and ideal donation opportunity to the prospects when asking for gifts.

CLOSE:
The appropriate Leadership Committee members will make the gift ask and follow-up to close.

STEWARDSHIP:
BCM&CC will recognize donors and continue to engage them. This is an ongoing process known as stewardship.
9.0 CAMPAIGN PRINCIPLES

9.1 GIVING BEGINS AT HOME

Experience conclusively demonstrates that successful fundraising begins from within the organization and from the top prospects. Thoughtful and proportionate giving by those closest to the BCM&CC campaign, who understand the need most intimately, will enhance the credibility of the Case for Support and will demonstrate a level of urgency. This includes BCM&CC’s patrons, members and Board of Directors.

9.2 CAMPAIGN LEADERSHIP MUST GIVE AT PROPORTIONALLY HIGH LEVELS

Others, not as close to the campaign, will respond more generously if they see that the campaign leadership has given at a high level in relation to their capacity to give. Token gifts by the campaign leadership will result in token gifts from outside interests. Volunteers must be able to point with pride and enthusiasm to the benchmarks they have set.

9.3 NAMING AND LEADERSHIP GIFTS DETERMINE SUCCESS

Giving from the top is a matter of impact. Those who are financially able to consider a major investment in the campaign will be looked upon as leaders by those of lesser means. Gifts by campaign leadership [Chair(s), Honorary Chair(s)] will validate the campaign and will increase the likelihood of success in the eyes of all subsequent donors.

These gifts also make a big difference. For instance, a $500,000 gift has a visible impact on a $2,000,000 goal.
10.0 CAMPAIGN STRATEGY

In successful campaigns, the following are axiomatic:

- The top 10 gifts to a campaign will account for 50-55% of the goal.
- The top 100 gifts to a campaign will account for 80-90% of the goal.

To be successful, the campaign must realize gifts of both a sufficient number and magnitude to meet the above criteria. Consequently, recruiting leadership and soliciting them for major gifts needs to be the early focus of the fundraising efforts. During the initial stage of the campaign you will need to carefully target, cultivate, and solicit lead gifts from high net-worth individuals, some corporations, and foundations, representing breakthroughs in giving that will challenge others to do the same.

It is essential that the very best prospects for the largest commitments be solicited at the outset of the campaign. As their large initial gifts are secured and publicized, other prospective contributors will be motivated to donate their own giving levels accordingly.

Since campaign resources are limited, it is important to prioritize activities. Potential contributors must be divided into groups corresponding to the levels at which they are able to contribute, and those potential contributors with the greatest potential must be solicited first.

As there are fewer potential donors for the largest gifts than there are for the gifts at the other levels, campaign leaders can concentrate their attention initially on those "top" prospects. The success of the campaign depends on the attainment of these gifts. Also, large gifts committed early in the campaign will serve to further validate the effort and generate additional momentum.

It is important to recruit informed, enthusiastic volunteers who are fully committed to BCM&CC. It must be a principle of the campaign that volunteers in each division make their personal gifts to the campaign before they ask others to do so. In this way, the volunteers become even more committed campaigners and they will be asking others to follow their lead.
DONORS TO ACHIEVE SUCCESS

In a capital campaign, it is essential that a scale of funding be projected in line with the proposed objective. Donors must relate their commitments to their ability to give, and to the campaign goal. Giving must be proportionate to the size of the goal if the campaign is to be successful. It is imperative to determine whether the necessary standards of giving can be realized. Failure to establish and adopt a realistic standard of giving will result in token gifts - gifts inadequate to both the donor’s capacity to give and to the overall campaign goal.

Experience has shown that certain levels of giving must be achieved in every capital campaign.

Typical major gift donation divisions are included in the sample campaign structure illustration in Appendix IV.
12.0

AWARENESS AND CULTIVATION

Donor awareness and cultivation are important adjuncts to the soliciting of gifts. The critical group of prospects - those whose gifts are critical to the success of the campaign - must be cultivated before they are asked to contribute.

The capacity to make a major gift to the campaign will not necessarily result in proportionate gifts unless there is a corresponding readiness to give. In most cases, it will be beneficial to establish a relationship between the BCM&CC and the prospect before asking for their gift.

Relationships begin with knowledge and evolve through the stages of interest, involvement, investment, and finally, ownership. Cultivation accelerates the process and increases the likelihood of securing the maximum gift possible.

In addition to the on-going personal cultivation by the campaign leaders, it will be necessary to hold a series of meetings where prospective donors and leaders can learn more about the project. In most cases, these meetings will be one-on-one.
13.0 DETERMINING CAMPAIGN COSTS

Costs vary significantly by campaign. The budget is calculated as a percentage of the campaign goal – the larger the goal, the smaller the percentage. The reasoning is some campaign costs will be the same, not matter how big or small the goal. Budgets for large campaigns ($10 million+) can be kept as low as 2% or 3% of the campaign goal. However, for campaigns under $10 million, run by organizations lacking an appropriate fundraising infrastructure in the beginning, the cost of the campaign will be closer to 10-12%. The steps in determining the cost of the campaign is to retain a consultant or have your development department conduct a Planning Study.
14.0 CONCLUSION

The key to a successful campaign for BCM&CC is to create the framework for the 7 step Power Solution which will develop a culture of philanthropy among BCM&CC administration and potential community leadership. It is important in early stage planning that BCM&CC defines a funding model which addresses the immediate capital requirements and builds a sustainability component within the overall organization for future funding.

Given the evolving nature of funds needed for a capital campaign it is possible that BCM&CC will potentially need to increase the overall size and scope of the financial goal. That being said, BCM&CC should consider incorporating an endowment component in the campaign goal. The endowment component is important for the future sustainability of BCM&CC, in that it will provide ongoing funding for operations and programming. As a preliminary consideration prior to developing the capital/endowment case for support, it is recommended that BCM&CC consider a plan to raise between $3.5 and $5 million.

The overall benefit of conducting a campaign which falls within the cultural heritage envelope presents an opportunity to identify and access governmental grants. There are options for such funding available from federal, provincial and municipal departments and agencies specific to museums and arts organizations. A chart listing the various potential granting bodies has been outlined in Appendix III within this report. It is important to remember when pursuing grants that a large portion of the funds must be matched by the grantee and therefore grant funds alone will not cover the total costs of any capital project or program. To raise the funds needed to match a government grant, BCM&CC will require private sources which will be leveraged by the public funds.

The environmental scan of campaigns within the catchment area of Bruce County, shows that there are a number of multi-million dollar campaigns either underway or concluded. This also indicates that funding at levels commensurate with positive philanthropic giving is also available in the Region in support of these capital campaigns. Examples of recent campaigns in the region, include the Wingham Hospital’s “Our Hospital, Our Future” Campaign for $4 million; Grey Bruce Health Services’ “Light the Way Campaign” for $11.4 million; the Chapman House’s “Help Build Our Home in 2016” Campaign for $4 million; and the YMCA of Owen Sound Grey Bruce’s Capital Campaign for $5 million. Certainly, there is still funding available for BCM&CC but success is predicated its ability to identify and engage the donors who have a specific interest in the arts, culture, and BCM&CC’s vision.

As a point of reference, Federal grants are available through the Department of Canadian Heritage and the Department of Employment and Social Development Canada (ESDC). Examples include the Museum Assistance Program (Canadian Heritage), Enabling Accessibility (EDSC), the New Horizons for Seniors Program (ESDC), and the Canada Cultural Spaces Fund (Canadian Heritage). In Ontario the Ontario Trillium Foundation provides capital and program grants. Please see attached a more detailed list of federal and provincial grant opportunities. Funding matters has 20-year history of accessing federal and municipal funding for cultural organizations.

To ensure success, BCM&CC should review the recommendations from the Museum Feasibility Study and plan accordingly to undertake a Major Gift Feasibility Study which will uncover funding and leadership opportunities based on the elements within the Museum and the opportunity to maintain a sustainable future by creating an endowment fund for future needs.
APPENDIX I
7 STEP POWER DONOR SOLUTION

The process of securing a major or planned gift can take 9-24 months. The 7 Step Power Donor Solution describes this process and the below chart outlines the activities for each step. Ongoing activities for each step will continue until the fundraising goal is reached.

<table>
<thead>
<tr>
<th></th>
<th>One-Time Activities</th>
<th>Ongoing Activities (continue once started)</th>
</tr>
</thead>
</table>
| **STEP 1** BRAINSTORMING & STRATEGY | • Review Existing Fundraising Materials  
• Define Campaign Objectives, Deadlines  
• Write Case for Support | • Brainstorm prospects and campaign leadership |
| **STEP 2** PROSPECT RESEARCH & ID | • Set up Prospect Database  
• Compile Initial Prospect List | • Prospect Identification and Research |
| **STEP 3** CONNECTORS | • Recruit Steering Committee and Leadership Committee  
• Identify connectors | • Expand Leadership Committee  
• Grow and cultivate connectors |
| **STEP 4** COMMUNICATION | • Develop key message, campaign communications materials, and gift naming opportunities | • Refine Case for Support  
• Cultivate prospects |
| **STEP 5** LEVERAGE | • Use the Best Ways to Give web app in prospect as a cultivation tool | • Develop proposals for prospects  
• Discuss gift options with prospects’ financial and legal advisors |
| **STEP 6** ALLIANCE | • Leadership Committee advances prospect cultivation | • Multiple face-to-face meetings with prospects |
| **STEP 7** CLOSE | • Solicit prospects and secure gifts | • Donor stewardship |
APPENDIX II
PLANNING STUDY INTERVIEW TEMPLATE

SAMPLE QUESTIONS FOR BCM&CC CAPITAL CAMPAIGN

QUESTIONS FOR BCM&CC:

1. On a scale of 1 to 5 what is your personal image of BCM&CC?
   Rate from one to five (1) (2) (3) (4) (5) with 5 being “Very positive” and 1 being “Very negative”

2. How aware are you? do you visit or volunteer, when was the last time you were there and what kind of image did it present to the public?
   Comments:

3. On a scale of 1 to 5 what is the public’s image of BCM&CC?
   Rate from one to five (1) (2) (3) (4) (5) with 5 being “Very positive” and 1 being “Very negative”

4. How aware is the community of BCM&CC? What have you heard, if at all, from others?
   Comments:

5. A few days ago, you received a copy of the draft Case for Support for BCM&CC Capital Campaign, which proposed a $xx Million Campaign. Have you had a chance to review it?
   Yes, No, N/A
   Comments:

6. On a scale of 1 to 5 (5 being “Very persuasive” and 1 being “Not at all persuasive”) how would you rate this document overall as a compelling Case in Support of the proposed $xx Million Campaign?
   Comments:

7. On a scale of 1 to 5 (5 being “Very effective” and 1 being “Not at all effective”) how would you rate the effectiveness of the Case for Support in creating a realistic picture of the need and the objectives for BCM&CC?

8. Do you agree with the proposed name BCM&CC Capital Campaign?
9. Where, in your view, do you feel the arguments in the Case for Support are weak or unsubstantiated?
   Comments:

10. Please rank the funding priorities in order of importance to you (1 being “Most important “)
    Ranking 1 - 2
    a. Capital Expenses $XX Million
    Why?
    b. Endowment is $XX Million
    c.

11. Do you feel it is important to conduct a Campaign to raise $XX Million for this project? Yes, no, N/A
    Comments:

12. Do you believe the fundraising goal $XX Million can be raised?
    Yes, No, N/A
    Comments:
    If no, what do you think might be feasible?

13. Who are the likely funders for the BCM&CC Capital Campaign?
14. Do you think that in the giving levels required to be successful in a $XX Million Campaign are there potential donors who would make the following gifts over a 5-year period?

a. $5 million gift?
   Yes, No
   Who?

b. $2 million gift?
   Yes, No
   Who?

c. $1 million gift?
   Yes, No
   Who?

d. $500,000 gift?
   Yes, No
   Who?

e. $250,000 gift?
   Yes, No
   Who?

f. $100,000 gift?
   Yes, No
   Who?

g. Other possible donors?

15. 70% of Canadians over the age of 50 do not have wills as part of their estate plans. Do you have a will? If yes, have you included a charitable bequest as part of your estate plan?

16. Leadership Committee: Campaigns of this nature succeed based on who lends his/her name and influence to the campaign; these people are responsible for personally negotiating many of the lead gifts and are expected to personally contribute a major gift to the campaign. Could you suggest the names of individuals who should be considered as candidates for positions in the campaign leadership?
# APPENDIX III
## SAMPLE GRANT CHART

<table>
<thead>
<tr>
<th>Canada Cultural Spaces Fund</th>
<th>Government of Canada</th>
<th>Application Deadline: No Deadline</th>
</tr>
</thead>
</table>

## Program Description

As part of the 2016 budget, the federal government announced that over the next two years, it will be investing an additional $168.2 million in cultural infrastructure through the Canada Cultural Spaces Fund. As of May 1, 2016, Public Art and Feasibility Studies are now eligible for support under the Fund.

The Canada Cultural Spaces Fund (CCSF) supports the improvement of physical conditions for artistic creativity and innovation. The fund supports the improvement, renovation and construction of arts and heritage facilities, as well as the acquisition of specialized equipment.

By supporting improvements to our country’s cultural spaces, the CCSF increases access for Canadians to performing arts, visual arts, media arts, museum collections and heritage displays.

## Eligibility

Eligible applicants include:

- not-for-profit arts and heritage organizations, incorporated under the Canada Not-for-Profit Corporations Act, Part II of the Canada Corporations Act or under corresponding provincial or territorial legislation;
- provincial/territorial governments, municipal or regional governments and their agencies; and
- Aboriginal people’s institutions or organizations. Federal organizations and federal Crown corporations are not eligible for funding.

## Funding Details

### CAPITAL

**Deadline**

*The Canada Cultural Spaces Fund receives applications on an ongoing basis.*

**Funding Conditions**

*The Program can finance up to 50% of eligible project.*

Please note that the CCSF is a highly competitive program and the demand exceeds available resources. Even if eligibility requirements are met, there is no guarantee of support. The average approved contribution is 37% of total project cost.
| Program Description | The Enabling Accessibility Fund is a federal Grants and Contributions program that supports capital costs of construction and renovations related to improving physical accessibility and safety for people with disabilities in Canadian communities and workplaces.

From installing screen reader devices, hearing induction loop systems, automated door openers, constructing a universally designed office or retrofitting a washroom with an accessible toilet, grab bars and taps, the Enabling Accessibility Fund works to enable Canadians with disabilities to participate in their community and the economy.

Since its creation in 2007, the program has funded over 2,300 projects across the country and has improved accessibility for thousands of Canadians. For information on past funded projects, you may browse the approved projects list. |

| Eligibility | The Community Accessibility Stream provides funding to eligible recipients for projects that improve accessibility in communities across Canada. Projects may include:

- renovating, retrofitting or constructing community facilities where programs and/or services are or will be offered to people with disabilities;
- retrofitting motor vehicles used as community-based transportation; and,
- providing information and communications technologies for community use.

To be considered eligible for funding, projects must be directly related to removing barriers and increasing accessibility for people with disabilities in Canadian communities. All projects must also meet the specific eligibility criteria identified in calls for proposals, including support from the community. |

| Funding Details | No details on funding amount available on website.|

**As 2017 Jan 03: the application process is not open; nor are there any details about upcoming deadlines**
Community-based projects under the New Horizons for Seniors Program (NHSP) that enable seniors to share their knowledge, skills and experiences with others, and help communities increase their capacity to address local issues, are eligible to receive up to $25,000 per year, per organization. Projects must address one or more of the program’s five objectives:

1. promoting volunteerism among seniors and other generations;
2. engaging seniors in the community through the mentoring of others;
3. expanding awareness of elder abuse, including financial abuse;
4. supporting the social participation and inclusion of seniors; and
5. providing capital assistance for new and existing community projects and/or programs for seniors.

The NHSP seeks to fund programs or projects that:

- are seniors’ led or inspired;
- benefit a broad clientele;
- present an innovative and creative approach to address a community concern;
- strive to have a lasting impact on communities;
- involve collaboration and partnerships; and
- use resources efficiently and effectively.

Funding is available for a project only once and cannot be renewed. Each year, communities must propose project activities different from those previously funded. If your project will be ongoing, you should consider what resources you will need in order to continue after NHSP funding ends.

Projects must:

- be led or inspired by seniors. If inspired by seniors, they must be involved in the project’s development and/or implementation in a meaningful way.
- occur within a 12-month (52-week) period. NHSP only funds projects that will be completed within this time frame.

The role of seniors is a key element when NHSP projects are being considered for funding:

- It is not enough that an organization proposes to carry out an activity and
then recruits seniors to take part in it.

- Consulting with seniors to develop a project of benefit to them is also not sufficient.
- Projects must be led or inspired by seniors. For those projects that primarily meet one of the first four program objectives, projects must:
  - involve programs or activities not already carried out by your organization

**Footnote**
For those projects that primarily meet the fifth objective, projects must:

- involve programs or activities not already carried out by your organization

These new programs or activities must also meet one of the first four program objectives; and/or

- involve current programs or activities that are at risk of not continuing should the renovation and/or equipment purchase not be funded. These current programs or activities must also meet one of the first four program objectives.

**Eligible projects**
In order to be eligible, project activities must be led by seniors, or seniors must play a meaningful role in the project (planning and/or delivery). Activities eligible for funding can include, but are not limited to, the following:

- seniors developing approaches to encourage new and emerging cohorts of seniors to be more actively involved in community activities;
- adopting approaches (policies and tools) to more effectively attract, recruit and retain diverse cohorts of volunteers, including other generations;
- expanding and/or adapting successful approaches (programs and activities) to reach new group of seniors (e.g. a specific population of seniors such as Aboriginal seniors or seniors from a different geographical location that do not currently have access to the approach). A project could include identifying target group(s); adapting programs and activities to meet needs, and/or overcoming barriers to participation and undertaking outreach to these seniors

**Funding Details**

As of 2017 Jan 03:
The application period for Community-based projects under the New Horizons for Seniors Program 2016-2017 is now closed. Information on future calls for proposals will be posted as it becomes available.

Organizations are allowed to submit multiple applications; however, the total of all applications combined must not exceed $25,000, including applicable taxes per year, per organization. Otherwise, the organization will have to withdraw an application to respect the funding limit.
<table>
<thead>
<tr>
<th>Seniors Community Grant Program</th>
<th>Province of Ontario</th>
<th>Application Deadline:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Competition Not Yet Open</td>
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<tr>
<td></td>
<td></td>
<td>Application:</td>
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<table>
<thead>
<tr>
<th>Program Description</th>
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<tbody>
<tr>
<td>The Seniors Community Grant Program, the first grant program in Ontario dedicated solely to seniors, was introduced to give seniors more opportunities to participate in their communities by providing funding to not-for-profit community groups for projects that encourage greater social inclusion, volunteerism and community engagement for seniors.</td>
</tr>
<tr>
<td>The program is focused on encouraging initiatives and projects in the non-profit sector that encourage greater social inclusion, volunteerism, education and community engagement for seniors across the province.</td>
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<table>
<thead>
<tr>
<th>Funding Details</th>
</tr>
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<tbody>
<tr>
<td>Applications will be accepted between November 25, 2016 and March 3, 2017. Projects must not start prior to June 15, 2017 and be completed by March 31, 2018.</td>
</tr>
<tr>
<td>Grants range from $500-$8,000.</td>
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<thead>
<tr>
<th>Proposed Projects and Other Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Over the past two years, the Seniors Community Grant Program has already supported 544 projects and helped approximately 116,000 seniors across the province. List of past recipients available on website, but no dollar amounts available.</td>
</tr>
</tbody>
</table>
**Program Description**

**Purpose**
OTF provides capital funding to improve the infrastructure required for communities to thrive. Funding is delivered through a process that allows OTF to respond flexibly and effectively to the broad and deep need for community-oriented capital funding across Ontario. The Capital Investment Stream is for capital-specific projects that align with one of the OTF Priority Outcomes and its related Grant Result.

**Types of projects**
All supported Capital specific projects must achieve measured impact in their community. Specifically, the purpose of OTF capital funding is to:

- Enhance access to community spaces, programs, activities and services, and facilitate community members’ full participation in the life of the community
- Promote energy efficiency and contribute to environmental outcomes by ‘greening’ community spaces
- Enhance and build community spaces that support OTF Priority Outcomes
- Enhance the efficiency and effectiveness of programs and make better use of technological resources

**Funding Details**

NEW CAPITAL STREAM DEADLINE IS **OCTOBER 25, 2017, 5 P.M. ET.**

- Amount range: $5,000 to $150,000
- Duration: Up to 1 year
- Note: 10% of the funding will be held back, to be paid upon satisfactory review of the final report.
APPENDIX IV
SAMPLE CAMPAIGN STRUCTURE

- **Board of Directors**
- **Development Office**
- **Steering Committee**
- **Campaign Chair(s)**
- **Leadership Committee**
  - **Honorary Chair(s)**
  - **Patron(s)**
- **Professional Advisors**
  - Accountants
  - Financial Advisors
  - Lawyers
- **Prospect Review Committee**
- **Building Committee**
- **Major Gifts**
  - $1,000,000 +
  - $500,000 - $999,999
  - $250,000 - $499,999
  - $50,000 - $249,999
  - $50 - $49,999

Communication