

Charting the Course:

A Findings Report of research and community input to inform development of a Cultural Roadmap for Ottawa for 2019-2022

Prepared for delegate input at the January 17-18, 2019 Ottawa Cultural Summit

About this Document

This document is designed to contribute shared knowledge, insights and recommended ways-forward based on research and consultations conducted to the end of December 2018, towards the creation of a Cultural Roadmap for Ottawa for 2019-2022.

It is intended for participants to review in advance of the January 17 and 18, 2019 Cultural Summit. At the summit participants will work together to confirm, refine and validate its contents and identify the vision and more concrete areas for action.

Other forums for feedback will be made available post-summit to help optimize community participation and ownership.

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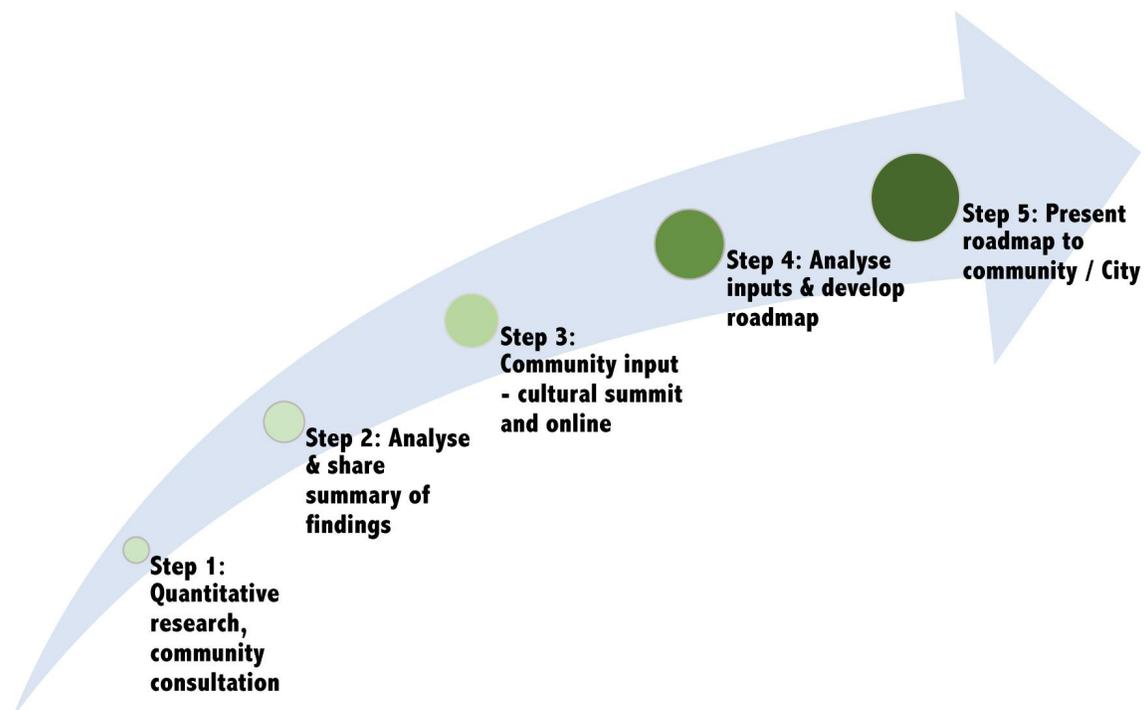
Introduction and Background

The Ottawa Cultural Alliance (OCA) is facilitating creation of a new community-driven Cultural Roadmap for 2019-2022 with the support of the City of Ottawa.

The new Cultural Roadmap and its associated research findings and recommendations are intended to provide current information to contribute to a new strategy for Ottawa's cultural sector¹ for 2019 and beyond. The results are also intended to inform the newly elected Ottawa City Council's planning and decision-making for the next four-year period.

This research Findings Report is Step 2 in a multi-step process (see Fig. 1) that integrates community participation into the roadmap's development.

Fig. 1 - Roadmap development process



It synthesizes the work of independent consultants who conducted research and provided data on Ottawa's cultural sector and consulted with the community to:

- develop a situation analysis of the state of culture in Ottawa;
- gather community views of culture and its presence in our community; and
- identify the key issues, challenges and priorities for Ottawa's cultural sector and scene over the next four years.

¹ Ottawa's cultural sector includes organizations, artists and workers in all arts, festival, heritage and other cultural fields, inclusive of people from a diversity of ancestries, abilities, ages, countries of origin, cultures, genders, incomes, languages, races and sexual orientations.

Validation and further development of the material presented in this findings report will take place at the Ottawa Cultural Summit on January 17 and 18, 2019, with additional opportunity to contribute feedback online. Community members, cultural organizations, individuals working in the sector, policy-makers, funders and others interested in advancing Ottawa's cultural sector and scene are encouraged to engage in the process. The input will drive the priorities of the new Cultural Roadmap for Ottawa 2019-22.

This report is based on an analysis of the following activities:

Hill Strategies – Situational Analysis

A leader in cultural sector data collection statistics in Canada, Hill Strategies developed a data-grounded Situation Analysis Report reflecting arts, culture and heritage activities, participation rates, registered charities, trends and key indicators for Ottawa's cultural sector. They identified and analyzed new and current data to determine the state of culture in Ottawa. Their methodology included: collection and analysis of data from Statistics Canada (2016 and 2013 General Social Surveys), Canada Revenue Agency (open data source), Federal and Provincial government data reports, and local (Ottawa) sources.

Synapcity – Community Consultations

Synapcity is a community-based, non-profit organization, founded in Ottawa and dedicated to creating an inclusive culture of participation and civic purpose. Synapcity staff led 15 community outreach and facilitation consultations in Central, West, East and South neighborhoods of Ottawa. They reached 224 people from diverse² backgrounds through one-on-one, facilitated tabletop sessions. The discussions focused on social gaps, economic barriers to entry, and understanding the communities' engagement with, knowledge of and priorities for Ottawa's cultural sector.

Lord Cultural Resources and Nordicity – Arms-Length Cultural Development Feasibility Study

Separate from and independent of this Cultural Roadmap initiative, Lord Cultural Resources and Nordicity completed an Arms-Length Cultural Development Feasibility Study to investigate how culture could be led and funded in our city. This independent, community-driven initiative was completed with funding from the City of Ottawa. It was informed by research on leading practices from other cities and extensive consultations with the community, its leaders, City staff and residents to help identify alternative models for cultural sector leadership that may apply to Ottawa's situation. Feasibility Study findings informed the Environmental Scan discussed below.

Lord Cultural Resources and Nordicity – Environmental Scan

Lord Cultural Resources and Nordicity completed an environmental scan and PESTLE (Political, Economic, Societal, Technological, Legal, Environmental) analysis report of the changing

² Synapcity consultations were designed to reach groups at risk of exclusion according to the City of Ottawa's Equity and Inclusion Lens, however there were no participants who self-identified as Aboriginal Peoples, LGBTQ, or persons with disabilities.

Ottawa cultural sector landscape; a comprehensive assessment of Ottawa cultural sector inventory, trends, gaps and growth opportunities; and a SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis providing current data and a clear understanding of the Ottawa cultural sector in 2018 including identification of key issues and opportunities. This work was informed by key informant interviews, literature review, the data listed above from Hill Strategies, and the Synapcity consultations and also drew from the Feasibility Study research and consultations.

Ottawa Cultural Research Group (OCRG)

OCRG is an innovative partnership that includes researchers from government, community organizations, the culture sector, and academia that are committed to analyzing and sharing reliable data and indicators about the state of Ottawa's culture sector. OCRG has developed the most comprehensive culture indicators ever published and their research on the state of Ottawa's culture sector fed into the research for this report, in particular Hill Strategies' Situation Analysis.

Ottawa Cultural Tourism Working Group (OCTWG) – Cultural Tourism Report

The OCTWG was created in recognition of the importance to develop Ottawa's cultural tourism through a strategic, integrated approach. Members determined that synergies and cooperative action were critical to better empower local tourism and cultural sectors, leveraging associated assets to support and attract sustainable, economic and creative atmospheres, year-round. The OCTWG prepared the report which presents results of a 2018 cultural tourism kiosk pilot project as well as findings from the 2018 United Nations World Tourism Organization's 'Tourism and Cultural Synergies' report, specifically identifying the importance of investment in cultural tourism now to capitalize on the tourism market buying decision trends for authentic, local and contemporary cultural experiences. The report identifies trends and present-day opportunities that Ottawa's cultural, tourism, hotel and business sectors should consider.

This document synthesises the results of the above-listed activities by:

- Summarizing at a high level the current state of culture in Ottawa as well as key issues, challenges and priorities articulated by community participating in the consultation process to date in the upcoming section: **Where are we now?**
- Reflecting community input to date regarding our aspirations, values, vision and areas to focus on for the future in the section: **Where do we want to go?**
- Summarizing **Next Steps** toward developing the Cultural Roadmap for Ottawa 2019-2022.

Where are we now?

Ottawa Cultural Sector Situation Analysis

Participation in Culture

Key Findings

Ottawa-Gatineau residents are avid cultural participants. Participation rates are higher than national averages and higher than in other large Census Metropolitan Areas (CMAs)³.

According to Statistics Canada data from 2016, among all Ottawa-Gatineau residents:

- 55% made or performed art
- 90% attended an arts activity
- 71% attended a performing arts event or artistic or cultural festival
- 75% visited a heritage site
- 63% visited a museum of any type, including art galleries
- 83% read a book

Participation is

- Lower for newcomers to Canada.
- Lower for linguistic minorities (non-English) than Ontario's English-speaking majority.
- Slightly lower for Indigenous people than non-Indigenous Canadians, particularly in areas of: reading a book, visiting a heritage site, visiting a museum.
- Lower for linguistic minorities than Ontario's English-speaking majority.

Challenges

- **Priority**⁴ - Improving diversity, inclusivity and equity were key themes in the research, particularly with respect to funding distribution and sectoral leadership.
- **Priority** - Reaching and attracting audiences, including improving opportunities for people to discover cultural offerings, promotion, and audience development were identified as key challenges facing the cultural sector, and considered priorities critical to success.
- Overall, improvements in the areas of communication (telling our story), collaboration and raising awareness of local cultural offerings are considered important.
- Joint efforts between tourism and cultural sectors were suggested as means of leveraging national events while increasing attention to and attendance for local cultural programming, and vice versa.

³ CMA's comparisons refer to Quebec, Montreal, Toronto, Winnipeg, Calgary, Edmonton, and Vancouver.

⁴ 'Priority' denotes recurring challenges and opportunities identified by community participants in the consultations to date.

Opportunities

- Work collectively to leverage cultural assets and tourism promotional initiatives, and support cross-sectoral development and collaboration to enhance Ottawa's efforts to become a cultural destination.
- Further leverage the city's many festivals, sightseeing, events, performances, historic sites, and local cultural offerings to strengthen the tourism market and help to increase length of stay.
- Increase financial accessibility of participation in culture, through flexible price structures (e.g. sliding scale, more free passes for museums, excess ticket sales to non-profits or discounted rush tickets).
- Increase physical accessibility by making venues and other physical infrastructure accessible to people with disabilities and mobility issues.
- Find innovative ways to bring grassroots groups together to leverage opportunities (e.g. "speed dating" to connect arts and culture organizations, artists' collectives).

Support for Culture

Key Findings

- In 2013, 2.8% of Ottawa-Gatineau residents (about 36,000) volunteered in a cultural organization⁵. That same year, 3.3% of the Ottawa-Gatineau residents (about 42,000), donated financially to a cultural organization. This is in line with the national average.
- The City of Ottawa's Arts and Heritage Development Unit (ADHU) is the main source of funding and centralized sectoral development support. Its budget of \$13.2 million is distributed by: 79% to Grants, 3% to Public Art, 3% to Programs and Initiatives (including considerable facility subsidy to funded organizations), and 16% for Staff and Administration costs.
- Total spending for culture by the City has grown very little (8%) since 2013, and the increases have not kept up with inflation and increases in the cost of living.
- The majority of funding grants for arts and culture are project-based and require annual application. This contributes to financial uncertainty and increases administrative costs for applicants.
- As Canada's capital, Ottawa is often host to large-scale, one-off, national cultural events. This is seen as having the potential to negatively impact local organizations with the associated funding/investments perceived to be delivered outside of and at the cost of the local community.

⁵ A direct measurement of local cultural volunteers and donors was not possible given the limitations of existing data sources. The (average) number of cultural volunteers across all jurisdictions in Canada is around 3% of the population.

Challenges

- **Priority** - Governance is a critical issue for non-profit and charitable organizations. Governance models for cultural sector organizations are seen as an area requiring improvement.
- **Priority** - A key challenge for the local (Ottawa) sector is competition with the large, federal, cultural institutions by “Ottawa’s non-profit arts, heritage and festival organizations” who cite challenges of “being visible”, having revenue-generating challenges, and experiencing “talent drain”.
- **Priority** - Human resources for leadership, succession, and sector development are limited in part because Ottawa cultural organizations are challenged to compete with the federal government and other public sector national cultural institutions that generally offer higher wages and benefits.
- **Priority** - The funding envelope – both from the municipal government and private sector – is insufficient to support current and future activities. Cultural sector stakeholders/workers struggle to “do more with less”. Ottawa’s cultural sector is seen as being fragmented, with missed opportunities for collaboration. Without greater strategic sector leadership and consolidated oversight over development, there is strong potential for the cultural sector to remain fragmented and possibly decline.
- There is a perceived lack of access to diverse, transparent and sustainable funding. Key gaps that stakeholders identified regarding the current funding model in Ottawa were:
 - Rigid funding eligibility criteria that limits or inhibits access to funding for individual artists and practitioners, emerging organizations or initiatives, as well as informal groups and collectives that lack the formal structures required to access existing funding programs.
 - Lack of sustained funding and a reliance on annual or project-based funding, which increases the administrative burden on applicants and inhibits longer-term planning.
 - Available funding for new initiatives is seen as negligible.
- It was noted that the cultural sector “does not have a voice at the Ottawa Gatineau Hotel Association (OGHA) table” which is seen as a gap.
- Many stakeholders expressed that the current municipal organizational model which governs Ottawa’s cultural sector development poses challenges to advancement potential. Specifically, the reorganization that moved the City’s Arts & Heritage Development Unit into the Recreation, Cultural and Facilities Services Department is seen as reducing the level of municipal leadership below what is needed to advance the cultural sector and scene.

Opportunities

- **Priority** - Develop a shared leadership model within the cultural sector, between multiple partners, across sectors and with community-level stakeholders.
- **Priority** - Improve wages, group and health benefits, pensions, and extended or continuing work terms for cultural sector workers.

- Support the OCRG as an innovative partnership that includes researchers from government, community organizations, the culture sector, and academia that are committed to analyzing and sharing reliable data and indicators about the state of Ottawa’s culture sector. Their work maps trends, acting as a building block to understanding the sector and represent data critical for the cultural sector’s future success.
- Refocus how to leverage philanthropy, funding, and social capital from outside the local “ecosystem”.
- Consider establishing a cultural foundation or other means to supplement municipal, provincial and federal funding, with a sector-wide approach to operations, capital needs and special events.
- Leverage existing partnerships and establish new partnerships to improve digital transformation of Ottawa’s cultural sector while becoming a key centre for digital media production/ creation.
- Enhance collaboration and integration with such organizations as Invest Ottawa (particularly in digital media), Ottawa Tourism and Business Improvement Areas as opportunities for sector growth.
- Pursue recommendations from the Arms-Length Cultural Development Feasibility Study such as a task force to address potential new models for cultural sector leadership and investment.
- Tap into Ottawa’s growing technology industry to develop partnership opportunities for cultural content.
- Ottawa is home to a huge and highly professional talent base in culture – arts, heritage, festivals, music, etc. Capitalize on these resources to undertake further sector development and provide sector leadership.
 - Better utilize Ottawa’s cultural sector’s highly professional talent base to support leadership and development.
 - Ensure inclusion of Indigenous and other communities at risk of exclusion in governance and sector development and planning.
 - Establish opportunities for cultural leadership training, for example through partnership work with organizations such as the Banff Centre for Creativity and/ or the Cultural Human Resources Council to assist the sector and coordinate training programs;
 - develop a human resources strategy to increase, attract, retain staff, and address core human resource issues and create more effective cultural sector staff and organizations.

Presence of Culture

Key Findings

Cultural Charities

There are 251 cultural charities in Ottawa-Gatineau. In the City of Ottawa, 221 cultural charities represented 9.5% of all local charities in 2016.

Social and Community Value (of 'Culture')

Communities and residents outside of the cultural sector value publicly funded cultural institutions. People consider Ottawa to be a festival city, and value its many multicultural festivals. In addition:

- Francophone and First Nations heritage are considered important aspects of Ottawa's cultural scene
- People noted that the city's green spaces encourage gathering, particularly outside of downtown, and may present opportunities for more cultural activities
- Large episodic events bring people out, such as: Parliament Hill Sound and Light Shows, Mosaiculture, La Machine
- Art in the public sphere is considered to make cities beautiful and help reduce crime
- Physical, public spaces that gather people together are valued
- People noted that 'Hidden Gems', such as smaller art and music venues need to be protected and appreciated
- Ottawa is known as the epicentre of the Francophone arts, culture and heritage community; the bulk of Francophone cultural leadership is based in Ottawa
- Recent advances like the Ottawa Art Gallery, National Arts Centre renewals, and a diversity of festivals have generated momentum for cultural sector development and the community sees this as a key time for further enhancement
- A wide variety of cultural organizations are seen as actively supporting and strengthening sector development, augmenting the municipal department model that is currently the main source of sector development and funding
- Ottawa is Canada's second largest technology hub. The technology sector is equal to government as an economic engine, which represents a unique opportunity for cross-sectoral (technology/ culture)
- The City is working to better engage Indigenous and independent and/or groups at greater risk of exclusion to build relationships, develop strategic cultural partnerships, focus on reconciliation and build access to municipal cultural opportunities for all.

Challenges

Some of the challenges identified in this area include:

- Cultural workers and organizations need affordable venues/spaces within which to operate, work, create, exhibit, perform, and sell.
- There are many underused spaces in the city that could benefit from revitalization to contribute to a thriving cultural scene, rather than traditional commercial development.
- It is recognized that while the rapid pace of development in the city will continue to exacerbate the space challenge, lack of affordable and accessible space is magnified for independent artists, persons with disabilities and Indigenous artists.
- Investments are needed to preserve, celebrate and permit discovery of our heritage properties.

Opportunities

- Develop accessible community cultural hubs for artists from all disciplines to work, perform and create, and for public attendance; and apply lessons learned from other cities which have done this successfully.
- Support and integrate national and international cultural events so local artists and the public benefit through expanded cultural programming with national/international talent and that encourages visiting.
- Recognize and leverage Ottawa's unique position as a capital city, and collaborate with other capitals.
- Nurture community level creative activities (e.g. more learning workshops, makerspace, innovation hubs, psy-trance music scene).
- Support spontaneity, amusement and joy (e.g. performances at traffic lights, sculptures with sound, guerilla art projects, pop-up events, swings at transit stops).

Where do we want to go?

The following diagram presents areas of priority and action that the initial research findings indicate should be the focus of Ottawa’s cultural development over the next several years.

These ideas are presented for further development at the Cultural Summit and follow-on feedback forums, through which the 2019-2022 vision for culture in Ottawa will also be defined:

Fig. 2 - Draft “Charting the Course” infographic (for validation):



The vision for culture in Ottawa

A long-term vision for culture in Ottawa will be a key discussion at the Cultural Summit and associated outreach. The goal is to articulate the vision of our diverse community in the Cultural Roadmap following these engagement activities.

The values that drive us

Community consultations identified the following draft shared values that should drive sector strategies and plans:

- **Authentic**
Serving and supporting traditional, emerging and innovative forms of creative and cultural work including the presentation and preservation of our intangible and tangible heritage
- **Inclusive**
Active relationships with diverse communities to ensure equitable opportunity and access for broader participation in cultural experiences, as well as to create, produce, and present cultural work
- **Responsive**
Grounded in community, serving the needs of the cultural sector through shared leadership, vision, planning and moral responsibility
- **Visionary**
Sustained, strategic investment that recognizes and helps realize the sector's value and distinctive contribution to economic, social and community health

How do we get there?

Analysis of findings synthesized the feedback into priority areas to focus on in order to fill gaps, seize opportunities and advance Ottawa's cultural sector in achieving the proposed vision for the future: Support for Culture, Participation in Culture, Presence of Culture.

Support for Culture

Ottawa's cultural sector and scene have grown to a point where there is evidence of 'what is working' and 'what needs improvement'. The community seeks supportive, local solutions that address specific gaps and forge beneficial partnerships, deepen community rootedness, and stabilize and improve the sector to the benefit of all citizens, including:

- **Multi-sector planning** and leveraging mutual benefits is a 'sum of all parts' principle. Specifically, the tourism, cultural, construction, business and educational sectors are targeted as working partners.
- New approaches and shared **leadership** are desired, with a focus on ongoing management and development of the cultural sector. The importance of cultural sector leadership that integrates with municipal, community and other cultural sector entities, and recognizes the critical contribution of culture to the city's well-being cannot be

understated. Diversity and inclusiveness with integrated indigenous and francophone participation are considered important in a new approach to sector leadership.

- **Human resources** need strategic development along with the stabilization of a skilled, sustainable, fairly compensated workforce. Issues like succession, long term sector planning, and integrating shared resources into areas such as promotion, training, cultural hubs, marketing, public relations, wages and benefits need to be addressed more effectively.
- **Funding and philanthropic giving** is addressed with a renewed approach, given the demand for and limitations of donors, grants and perspective resources.

Participation in Culture

Understanding the variety of challenges while supporting evidence-based solutions allows for the broadest participation within the cultural sector. Efforts to eliminate barriers ties closely to improved community leadership initiatives.

- Integrating cultural assets into **tourism strategies** increases the focus of Ottawa as a 'cultural destination', supporting multiple stakeholders and economic targets through expanded promotional, learning and engagement opportunities.
- **Requirement for space** considers participants (audiences, creators, etc.), ease of access (physical, cost, travel, etc.), heritage properties (accessibility, infrastructure investments, etc.), and purpose of space (makerspace, exhibition, performance, etc.).
- **Inclusion** considers barriers that may impede stakeholders' participation from various perspectives: creators, new immigrants, differently-abled; or limitations such as financial, linguistic, digital or mobility/travel. A '**barrier-free**' approach that encourages maximum participation for the general public, creators, venues, and other stakeholders ensures the broadest level of engagement in the sector.

Presence of Culture

There are numerous components of strategic, planning, societal development, technology, infrastructure, space and creative activity that can collectively and more effectively contribute to integrating the presence of culture.

- **Leverage the value** of the cultural sector recognizing traditional, contemporary and emerging art forms that support tourism and economic impacts as well as social and community-driven initiatives, specific to Ottawa as a capital city.
- **Expand the cultural asset profile along with a better understanding** of how the sector benefits youth, develops leaders and builds strong communities and societies.
- **Recognize current and developing assets** including Ottawa's technology sector, intangible 'products' as well as atmospheric elements that generate pleasure, surprise, and learning, presented in unexpected spaces or with creative technological methods.
- Remain mindful of **traditional cultural assets** by way of historical, societal, tangible and intangible presentation and their co-existence with contemporary cultural assets.

What is the road forward?

Within each of the priority areas, a number of action themes were identified to advance our cultural sector. These are summarized below as examples to generate discussion at the Cultural Summit and related outreach:

- “Next generation”, committed, collaborative leadership approach – actions could include:
 - Annual or semi-annual symposiums or similar planning initiatives to develop and implement a shared vision for the sector, bringing stakeholders together to plan a complementary approach to planning and development.
 - Implementing recommendations from the Arms-Length Cultural Development Feasibility Study regarding potential for a shared leadership model allowing for both oversight of the cultural sector, and connectivity with external supports and development opportunity for mutual stakeholders.
 - Identifying how to ensure that francophone and indigenous communities and others at risk of exclusion are included.
- Stable, more flexible funding – actions could include:
 - Committing to annual funding increases for culture aligned with inflation and cost of living, recognizing culture’s contribution to economic and social health integrated into City budgeting.
 - Looking at new ways of funding cultural work and different approaches to applying for funding.
- Improved human resource practices – actions could include:
 - A human resources strategy to increase, attract, retain, address core HR issues, and create more effective staff/organizations.
 - An audit of accessibility barriers/needs, governance models, cultural organizations’ life cycles, and financial resources including examining distribution platforms and financial instruments (change capital, investment changes, social financing).
 - Establish opportunities for cultural leadership training, for example through partnership with the Banff Centre, or establishing similar types of institutions in Ottawa.
 - Work with national organizations such as the Cultural Human Resources Council to coordinate training programs; partner with local secondary educational institutions to support cultural sector training and leadership training.

- Sustainable live, work, creation, and participation spaces – actions could include:
 - Increase the number and type of affordable spaces, particularly for creation, development and participation, expanding the sector’s creativity index/inventory while supporting economic, tourism destination and cultural worker/organizational objectives.
 - Incentivize re-purposing of under-utilized spaces for cultural purposes with focus on affordability and accessibility versus commercial re-development.
- Collaborative development and promotion of Ottawa as a cultural capital – actions could include:
 - Collaborative ventures that cross sectors and actively seek to include communities at risk of exclusion.
 - Strategically integrate contemporary and traditional cultural assets into local and national tourism strategies that enhance visitor experience opportunities and showcases and supports local creators.
 - Profile and leverage the value of the cultural sector by highlighting its many assets, finding public ‘champions’, and utilizing cultural sector contributors (artists, musicians, actors) into integrated promotional efforts.
- Greater diversity and inclusion (leading, working and participating) – actions could include:
 - Work proactively with municipal staff, cultural sector stakeholders and the community to develop strategies and solutions to eliminate barriers to inclusion. Ensure participation of francophone and indigenous communities and others at risk of exclusion in the solution.

Next Steps

Feedback from the cultural summit and subsequent input opportunities will be reviewed and analysed as the work continues toward the development of a community-driven final Cultural Roadmap for Ottawa.