



Janis A. Barlow & Associates



Haliburton Highlands Performing Arts Centre Feasibility Study

A presentation by Janis Barlow
& Rebecca Cann

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Study Credits

Sponsored by the
Haliburton Highlands Performing Arts Centre
Foundation

Thank you!

Study team:

Janis A. Barlow & Associates

Yallowega Architecture Inc.

Novita Techne Ltd.

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What is a Feasibility Study?

A feasibility study is **an assessment of the practicality of a proposed plan or project**, analyzing the viability of a project to determine its success.

A basic yet comprehensive study that examines

- Market (audience)
- Needs (of the community)
- Programs (of the future facility)
- Preliminary Architectural Evaluation
- Resources (financial, human)

AGENDA

1. Welcome and Introductions
2. Community Profile, Needs, Program and Market
3. Market – Supply/Demand, Audiences/Facilities
4. Building Program
5. Site Evaluation, Selection and Architecture
6. Outline Business Plan
7. Resource Analysis – Capital Costs, Funding Sources
8. Economic Impact
9. Next Steps



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**Community Profile, Needs,
Program and Market**

Community Consultation included...

Prospective Arts Users Surveys	24 respondents
General Public Survey	305 respondents
Community Interviews	37 participants

Community Profile

- 20,571 f/t population in 4,000 km²
- increased 13%> in 5 years
- Seasonal population of **over 48,000**.
- Each year, over 800,000 visitors to Algonquin Park
- 5 municipal governments within Haliburton Highlands

Haliburton's four adjacent counties are:

- | | |
|---|---------|
| • Peterborough City and County population | 147,688 |
| • Kawartha Lakes | 79,247 |
| • Muskoka | 66,674 |
| • Hastings | 91,100 |

Strengths

- The Environment – its physical beauty, the outdoors, lakes, trees, rocks
- The People - strong sense of community
- The Arts – vibrant arts community, lots of artisans and activity
- Growth due to pandemic

Community Needs

- Housing – affordable, attainable, any
- Poverty – two solitudes of the Highlands
- Transportation/ Access – no public transportation
- Growth due to pandemic

Strengths of the arts community

- Lots of activity and artists
- High calibre and diverse
- Haliburton School of Art & Design, Artist Studio Tours, two Public Art Galleries, +++++

“From drum circles to knitting circles.”

“Authentic.”

Concerns Related to this Project

- Do we need it?
- Can we afford it?
- Where will it go?
- What will happen to the Northern Lights Performing Arts Pavilion?

EVALUATING COMMUNITY NEEDS

Purpose-Built Performing Arts Facilities

Northern Lights Performing Arts Pavilion

- Owned and controlled by the school
- Available for community use evenings, weekends and in holidays
- Managed by an independent board, which rents to community
- Seating capacity – 226 seats

Concerns with NLPAP

- Access is limited – school use takes precedent
- Poor noise control and acoustic in the auditorium
- Insufficient stage size and backstage facilities
- No front-of-house services provided, and unlicensed
- Not enough seats for all users

Local Performing Arts Organizations include

Founding Dates of Local Performing Arts Organizations

	1970s	1990s	2000s	2010s	2020s
Highlands Little Theatre	1978				
Haliburton County Folk Society		1995			
Highlands Wind Symphony		1998			
Highlands Summer Festival			2001		
Heritage Ballet			2001		
Those Other Movies Haliburton			2004		
Highlands Opera Studio			2007		
Highlands Chamber Orchestra				2012	
Rural Rogues Productions				2016	
Highland Harmony Choir					2021

Members of the Haliburton Arts Council: 200

Performance Venues Used by Survey Respondents

Northern Lights Performing Arts Pavilion	10
Local Churches	5
Local Community Centres	5
Abbey Gardens	3

Rehearsals are often held in a warehouse space with no heating/cooling.

We asked Arts Users what Size of Venue they Wanted

of Users and Maximum Use Days per Venue Size

Venue Size/Nature	# of Users	Total Max Use Days
220 - 399 seat performance space	9	171
75-150 seat flexible space	9	154
400-500 seat performance space	1	22
Outdoor performance space	8	23

What other kinds of Space are Needed?

Other Types of Space	# of Users
Rehearsal Space	10
Audio Recording Space	6
Meeting or Function Space	5
Classrooms	3
Exhibition Space	1
Office Space	0

Need for Music Studio Space

Size of Space	Total Use Days
6 x 10 sf.	36
10 x 14 sf.	8
14 x 18 sf.	16
22 x 26 sf.	104
26 x 30 sf.	67

Ticket Prices & Rental Rate Levels

Ticket Price Range Charged by Survey Respondents	
Price	# of Users
\$0	1
\$1-15	2
\$16-25	6
\$26-40	2
\$41-60	0
over \$60	0

User Group Daily Rental Rate Expectations	# of Users
\$1.00 per seat of capacity	3
\$1.50 per seat of capacity	1
\$2.00 per seat of capacity	4
\$2.50 per seat of capacity	3
\$3.00 per seat of capacity	1

Summary of Community Need

- Local arts organizations are doing well – 70% to 100% capacity sales at the NLPAP
- Local arts organizations would rent approximately 170 days per year of a “main” space + other spaces
- Community user groups do not want to pay high rents
- The NLPAP cannot support all arts groups effectively, and is limiting potential for growth.

Programming Gaps / Opportunities from Consultation

“Don’t forget country music, rappers, and Star Trek enthusiasts!”

“The PAC could run music programs for toddlers, kids, youth.”

“Feature local artists as well as bringing talent in from
elsewhere.”

“The Full night out – dinner and show, and/or drink afterwards.”

“Lots of shared resource opportunities – equipment +...”

“An arts program that is mobile, agile, and accessible across the
geography and socio-economic spectrum in the Haliburton
Highlands.”



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Market

**Supply/Demand,
Audience/Facilities**

Public Survey

Do People Attend the Arts in Haliburton?

Activities Family Enjoys

Attending concerts	84%
Seeing a play or musical	84%
Visiting outdoor public art sites (ie outdoor monuments, murals and sculptures)	78%
Attending festivals	76%
Visiting art galleries and/or museums	75%
Touring artists' studios	71%
Learning an arts discipline as part of lifelong learning - painting, singing, playing a musical instrument, writing etc.	62%
Taking an arts or craft class for fun - flower arranging, painting	51%

Public Survey Results – out of 305 respondents

How do the Arts Serve the public? Their perspective:

In general, do you think the arts in the Haliburton Highlands are:

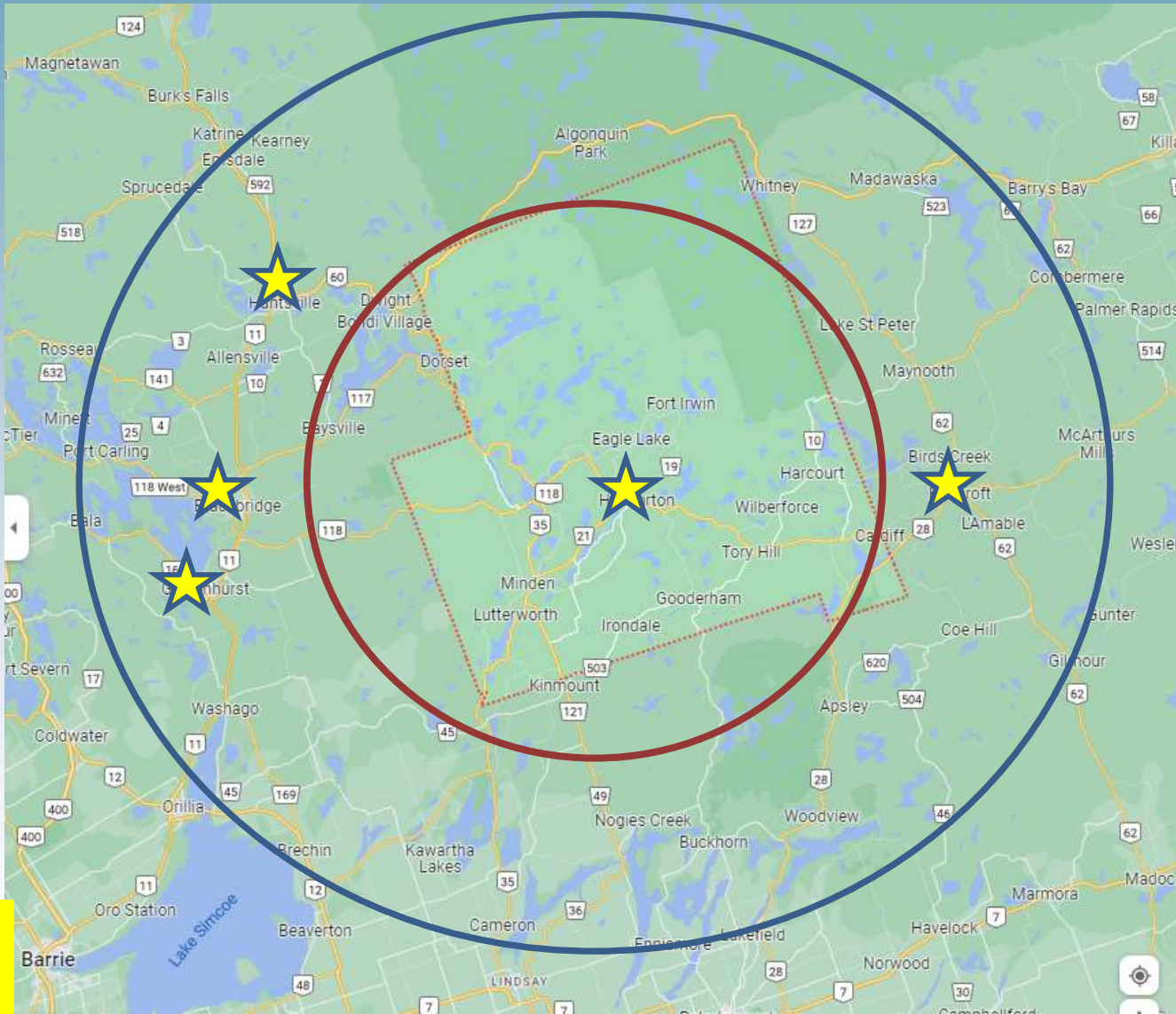
	Strongly agree, or Agree
Contributing to local quality of life	94%
Important to our local economy	91%
Important to individual self-expression, creativity and skills-building	91%
A recreational opportunity for all ages	91%
Essential to a local sense of identity	87%
In need of a purpose-built facility for professional and community artists	79%
Offering sufficiently diverse arts experiences for local arts audiences	81%
Primarily for tourists and seasonal residents	18%

MARKET AREA VENUES	Pop.	Driving Distance	Seating Capacity			
			50-150	151-250	251-399	400+
Studio Theatre, Orillia Opera House	31,166	127 km	108			
Trillium Court, Opera House, Gravenhurst	12,312	89 km	150			
Theatre by the Bay, Barrie	153,356	162 km		120-200		
Village Playhouse, Bancroft	3,881	62 km		192		
Northern Lights Pavilion, Haliburton	20,571			226		
Port Carling Memorial Community Centre	6,588	108 km			268	
Rene M Caisse Memorial Theatre, Bracebridge	16,010	83 km			303	
Main Stage, Opera House, Gravenhurst	12,312	89 km			320	
Market Hall, Peterborough	147,688	99 km			348	
Algonquin Theatre, Huntsville Place	19,816	94 km				408
The Stockey Centre, Parry Sound	6,408	167 km				415
Gordon Lightfoot Aud., Orillia Opera House	31,166	127 km				700
Flato Academy Theatre, Lindsay	20,713	99 km				900

Market Area Map

Haliburton plus tourists and regional area theatre-goers.

Primary Audience
30 to 60km radius



Secondary Audience
90km radius
+ Tourists

**** Rental Competition**

Observations of Market Area

- Inventory of market area venues suggests there is room for a new 300 – 400-seat venue
- Demographic analysis confirms audience growth potential
- Potential presenting partners:
 - Market Hall, Peterborough
 - Stockey Centre, Parry Sound

Program Considerations

- Acoustic music, musical theatre, opera, film – all will likely use a main space. Will also need to support amplified music, theatre and dance.
- Community use can be augmented with a presentation program of touring artists
- Outreach and/or educational programming will serve to engage local audience, children, youth

Operating Implications of Findings to Date...

- Low rental rates will mean a need for higher contributed income (sponsors, donors, grants)
- There may be additional partnership opportunities
- A “presentation program” can increase earned revenues and serve a broader audience
- Balancing professional arts with community arts use is critical to funding
- Facilitating community outreach and/or transportation for those who need it is important
- Housing for professional staff, artists, students and part-timers...?



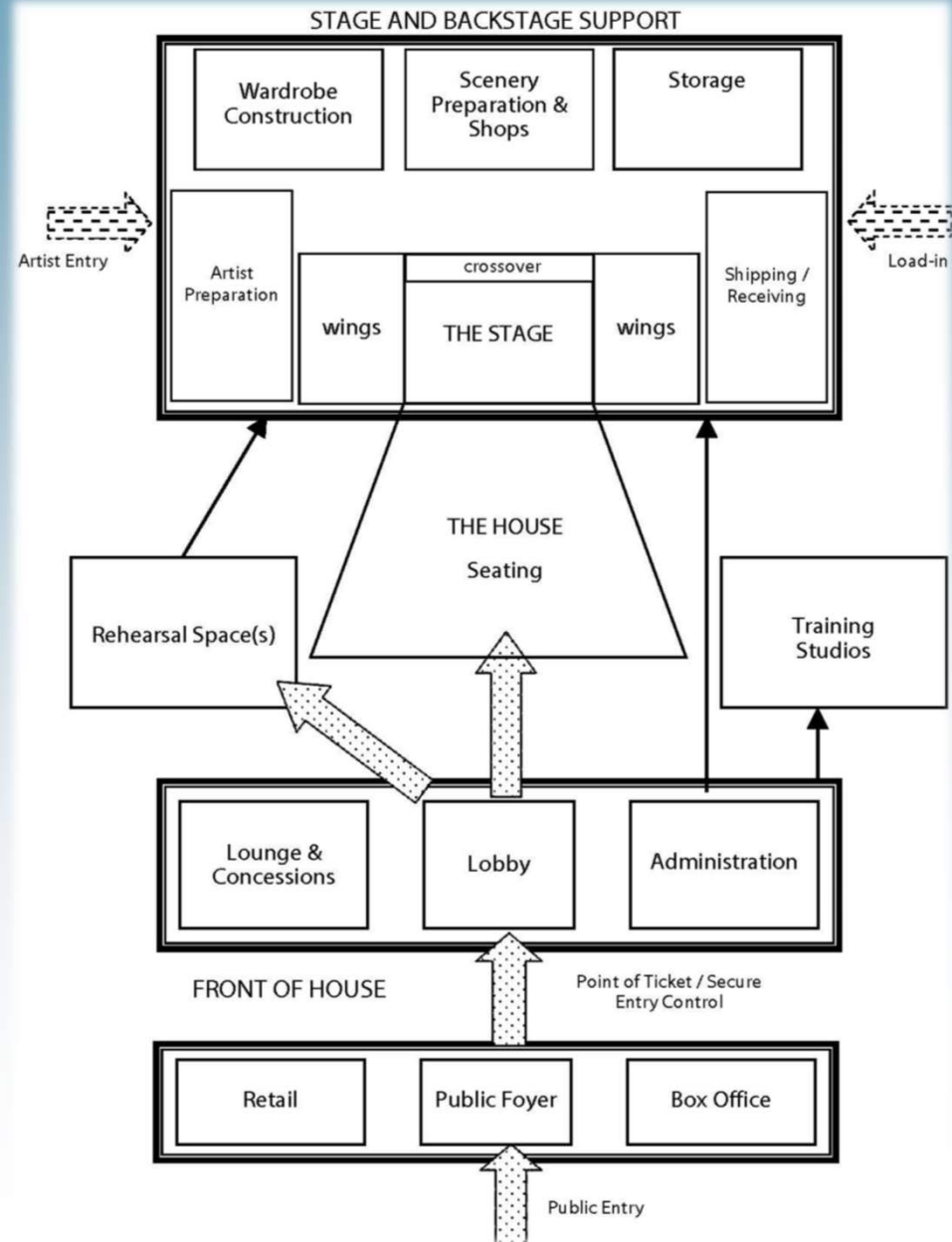
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Building Program

Articulate Activity and Building Programs

- A clear mission, values, vision, inform the building program
- A **building program** is a list of spaces and dimensions
- An **adjacency chart** maps critical circulation patterns
- **Outline specifications** are the qualitative and code narrative
- **Seat counts** dictate the formulae for all FOH spaces.
- The **program and business model** affects everything else.

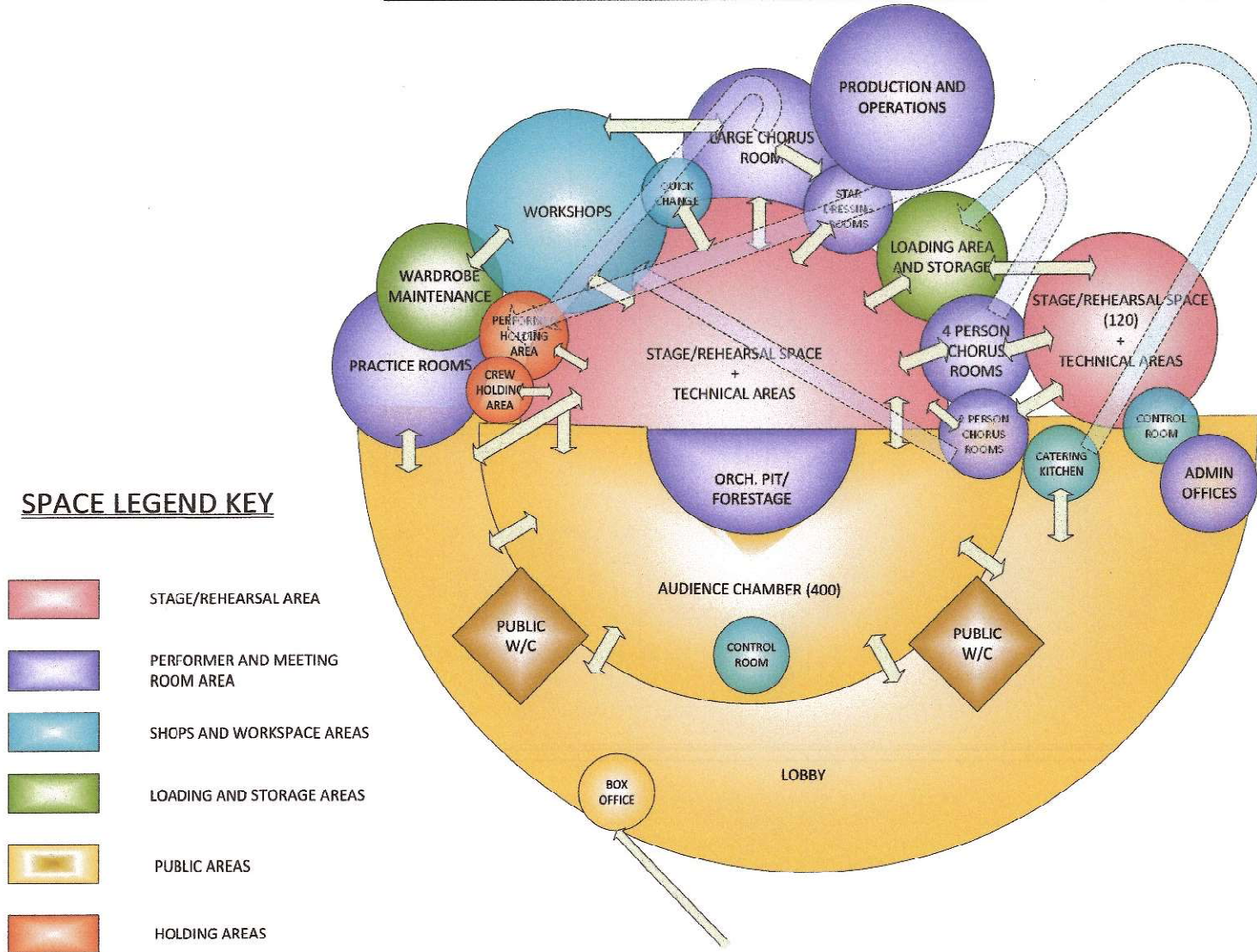


Building Program – Primary Revenue Generating Spaces

Proposed Building Program

- 300 – 400 seat performance venue – 300 seats in orchestra, 100 in balcony
- Versatile rehearsal hall – can be used as a small performance space
- Professional standards for backstage facilities
- Front of house lobby with concessions, catering kitchen, event space
- Administration space for theatre management
- Additional spaces for rent:
 - Offices
 - Music studios
 - Education space
 - Partnership space?

400 Seat Theatre and 120 Seat Rehearsal/Performance Spatial Size and Relationship Diagram

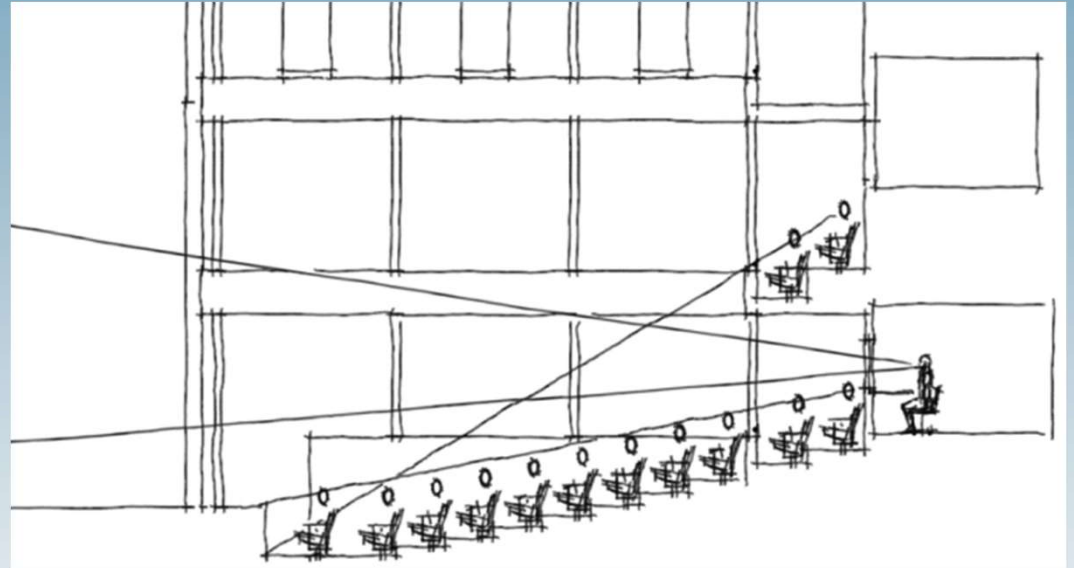


HOW – Theatres Are All About Seeing and Hearing Program/Building Program Basics



ACOUSTICS:

Noise Control, Tone, Clarity,
Amplification, Reverberation (decay
of sound) – differs by program



SIGHTLINES:

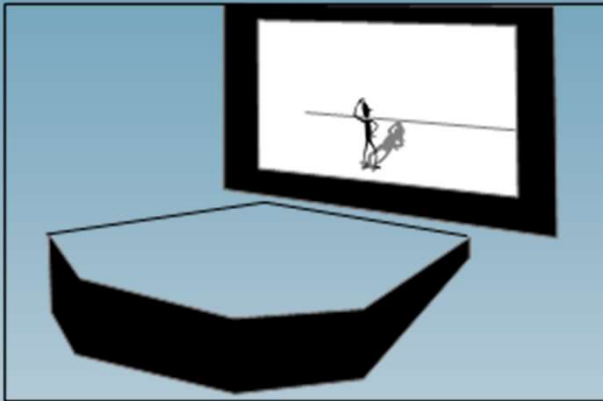
Dance: toes at stage edge (in the picture frame)

Drama: knees at stage edge (or better)

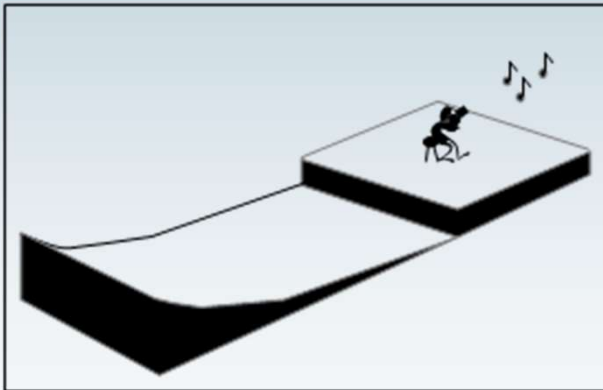
Music: waist at stage edge (or better)

Film: full screen with seats pitched to
centre of screen

Types of Theatres

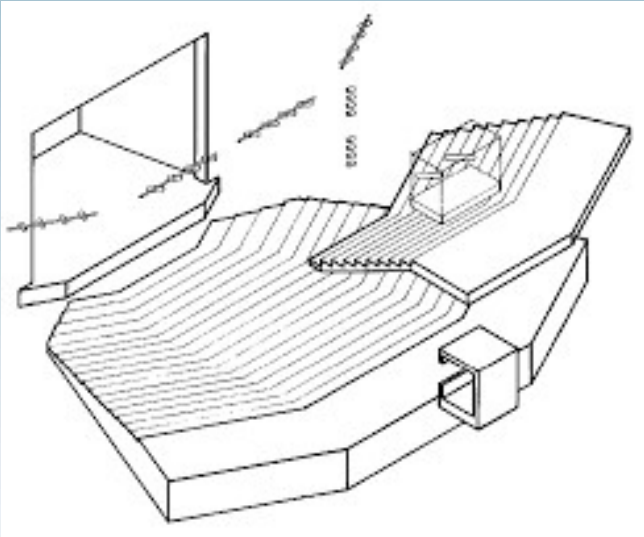


Proscenium Playhouse (no pit)



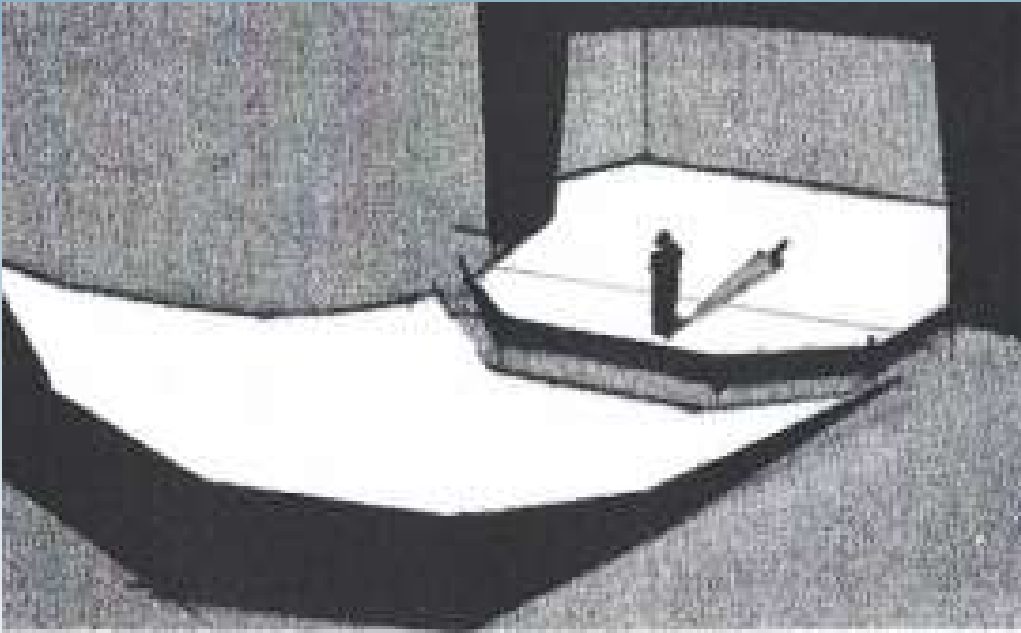
End Stage or Recital Hall (NLPAP)

Types of Theatres cont'd



Proscenium Lyric Theatre (with pit)
This has been discussed for the
Haliburton Highlands as a 300-seat
orchestra and a 100-seat balcony.

Choice of Theatre Type for Haliburton

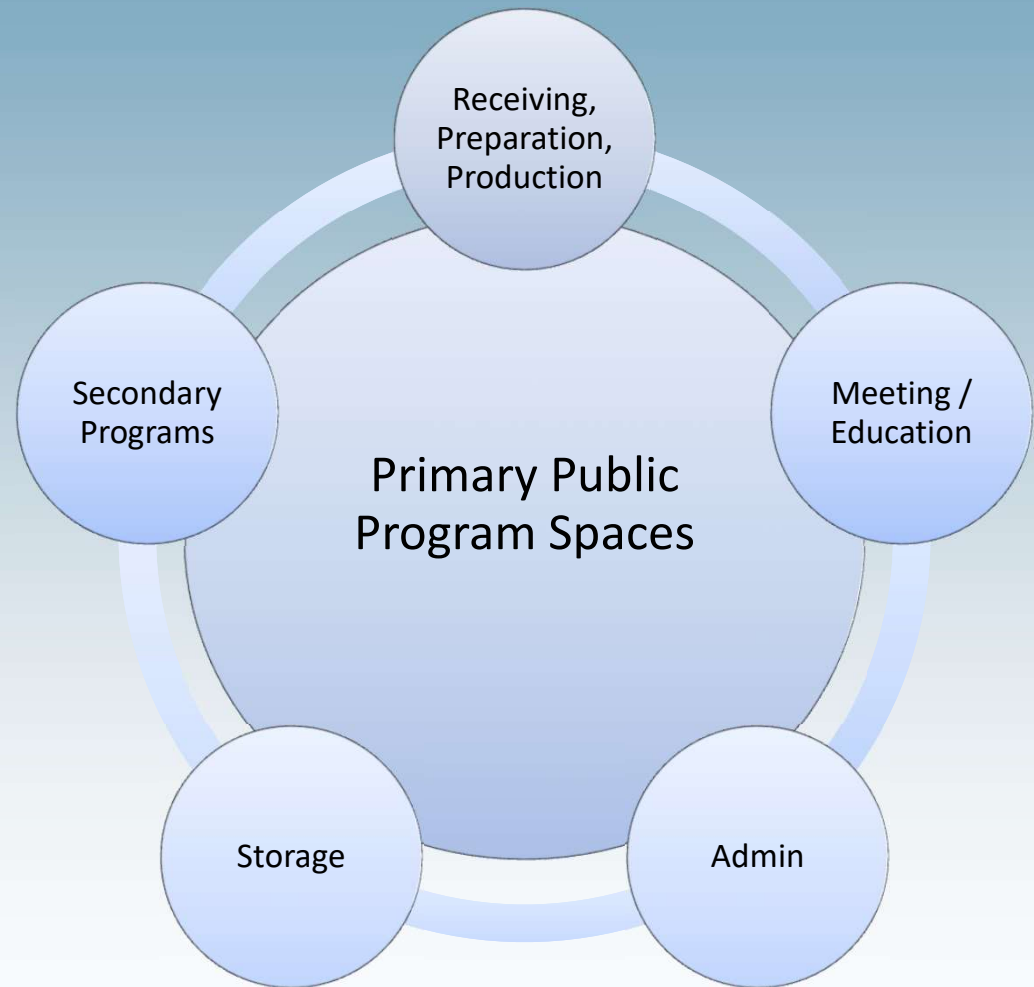


Hybrid - Proscenium Lyric/Recital Hall Convertible

The orchestra pit elevator brings the pit up to the stage level to form a thrust stage and acoustic shells come into place to shape the sound reflection so it doesn't disappear into the grid, upstage or into the wings.

Building Criteria

- Safety
- Function
- Comfort
- Aesthetic
- Cost
- Cost Effectiveness





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Site Evaluation and Selection

Optimal Location

- A buildable site with 5 to 10 acres.
- In or near an active village with restaurants, retail, services and parking.
- Best location determined to be between Minden and Haliburton.
- A site that will be donated / free to the project.
- Adequate electrical, hydro and sewage services.
- Well ploughed main highway access.

Site Evaluation

- Eight sites were reviewed.
- Two sites fulfill the site evaluation criteria
- One site offers more opportunities in terms of possible partnerships and highway visibility.
- The architectural concept that has been developed could be adopted to either site.

**THE RECOMMENDED SITE IS UNDER
WRAPS UNTIL FURTHER NOTICE**



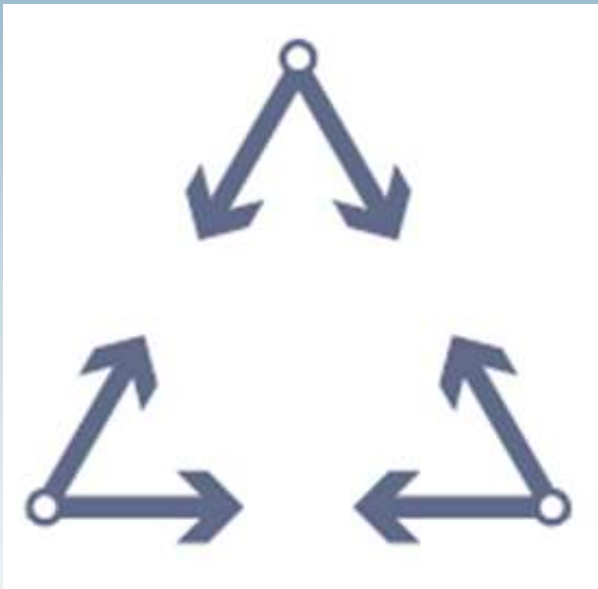
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Outline Business Plan

Business Plans and Operating Budgets Rely On...

Mission and Program



Capital
Structure

Organizational
Capacity

“The Iron Triangle:”

- Clear Mission and Program
- Sufficient Organizational Capacity
- Supportive Capital Structure
- An equilateral balance of:
 - **Mission First**
 - **Capacity (Human)**
 - **Capital (Financial)**

Proposed Mission

The Haliburton Highlands Performing Arts Centre is a not-for-profit charitable organization dedicated to serving the performing artists and audiences of the Haliburton Highlands.

We will program a full range of performing arts and film, independently and with community partners, and will provide purpose-built, professional facilities for shared experiences of the arts and a range of community gatherings.

Proposed Vision & Values

The HHPAC will bring the people of the Haliburton Highlands together in a centre for innovation, creativity and self-expression to build the cultural, social, environmental and economic fabric of our community, together.

Community Enrichment

Collaboration

Welcoming

Bold

Sustainable

Programming

- Primary – Renting & Presenting
- Ancillary – Outreach, Education, Partnerships

We see a community in which cultural programs and activities are accessible to all parts of our community and throughout all phases of life.

- Creative Together: A Cultural Plan for the Municipality of Dysart et al

Theatre Operational Considerations – Renting & Presenting are the Priorities

1. Business Models	2. Policy Governance	3. Market Conditions	4. Mgt. Resources	5. Start-Up Resources	6. Key to Success	7. Risk
“Rental” Theatre Facility(ies)	Client-driven (clients have audiences)	Demand for seating capacity(ies)	Expert theatre facility mgt.	Theatre Mgt. + 1 year of operations	Resident Companies, Versatility	Lowest risk, mitigated by client groups
Presenting Program	Audience-driven (focused on customer)	Market size/type, demand for programs	Expert in programming and audience development	Presenter + 3- years of annual operations	Signature program/ audience relations	Risk is higher, will vary with program
Producing Company	Mission-driven	Support for a specific or unique voice	Visionary artistic leadership	Producer + production costs + 5 yrs	Appeal or star power of the vision	Much higher risk

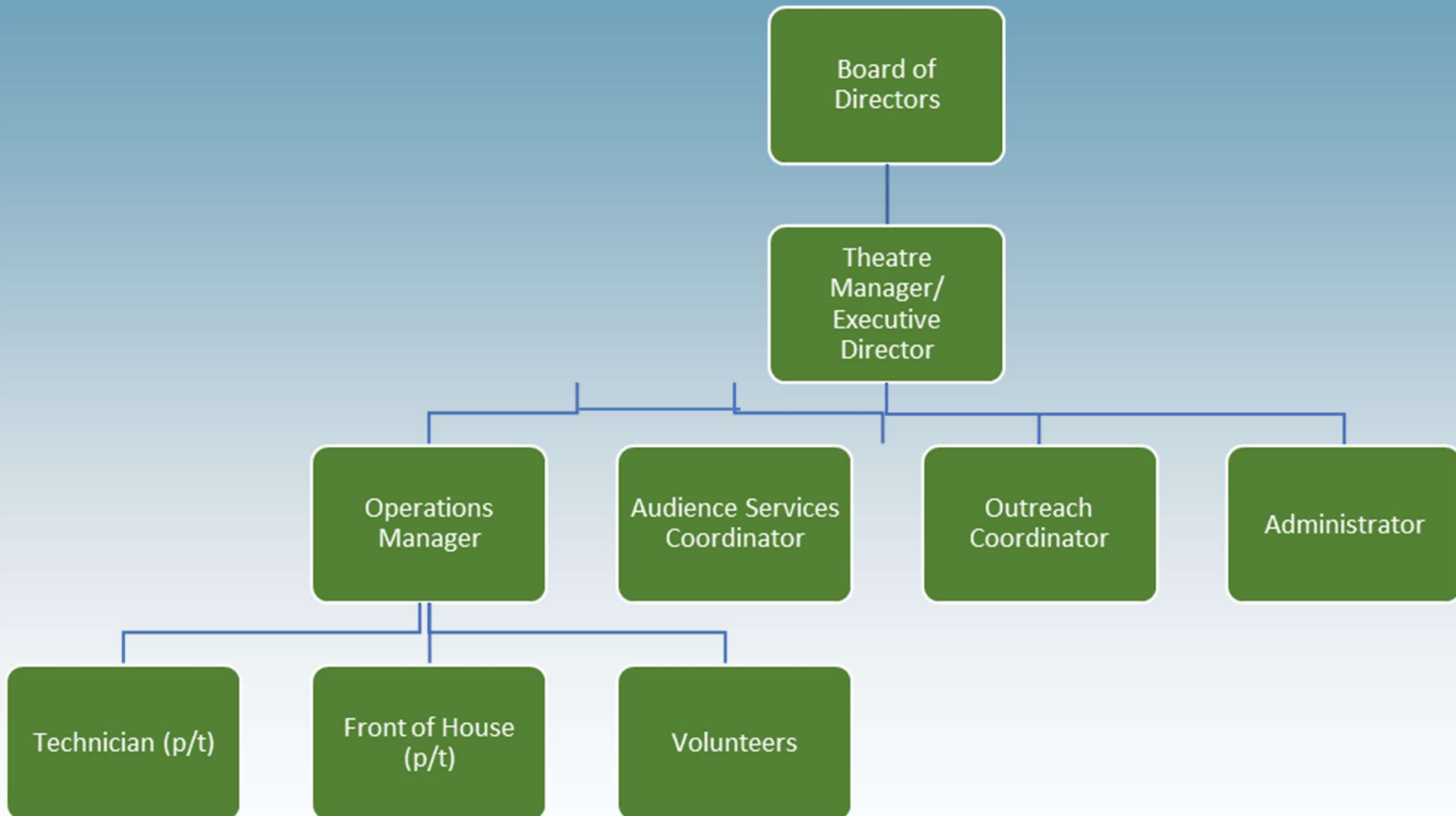
Ownership, Governance, Management

- Most performing arts centres of this nature are built and/or owned by municipalities.
- Some form of municipal support will be critical to the operation of a new facility – further discussion is required

Recommendation: Blended ownership and governance, combining independent not-for-profit organization with municipal support, with

Professional Management: 100% independent not-for-profit organization.

Staff Structure



Revenue Source Comparisons

Revenues of Performing Arts Companies	Ontario	Canada
	2018	
Performance Revenue	40%	38%
Other Sales	10%	10%
Public Sector	19%	27%
Private Sector	31%	25%

Revenue Source Comparisons - Local

Market Area Competitors - Revenue Sources Comparative	Earned	Contributed
Market Hall	81%	19%
Algonquin Theatre	73%	27%
Stockey Centre	39%	61%
Gravenhurst Opera House	23%	67%

**Haliburton Highlands
Performing Arts Centre**

81%

19%

Operating Budget Assumptions / Observations

- Revenues based on
 - 70% capacity in presentation program
 - 34 presentation shows per year
 - Ticket price range \$35 - \$50
 - 90 rental performances per year + rehearsal rentals
- No *consistent* source of operating funding is obvious at this time
- Expense budget is lean
- Assumes property tax is waived

(Mostly) Market Area Rental Rates

Theatre Rental Rates for Not-for-Profits	Hourly	8-hr Day	\$/seat
Stockey Centre (415 seats)	\$46	\$452	1.09
NLPAP - 226 seats - weekdays		\$280	1.24
Gravenhurst Opera House (320 seats)	\$82	\$557	1.74
NLPAP - 226 seats - weekends		\$465	2.06
<i>FirstOntario Performing Arts Centre (Robertson Theatre - 105 seats, 300 standing)</i>	\$36	\$288	2.74
<i>FirstOntario PAC (Recital Hall - 304 seats)</i>	\$115	\$920	3.03
Gravenhurst Trillium Court (100 seats)	\$46	\$368	3.68
Stockey Centre flat floor (180 seats)	\$46	\$634	3.52

What *might* it cost to rent the HHPAC?

Theatre	\$1.75 per seat, \$700 per day +
Rehearsal Hall	\$80 per day
Lobby	\$300 per day +
Meeting or Practice rooms	\$8 to \$10 per hour
Offices:	\$12/sf. for annual leases.

Addressing Affordability Concerns

Consider...

- Value for \$ - for artists and for audience
- Opportunity to increase your ticket prices by modest amounts
- Joint marketing with PAC and potential for audience growth
- Could identify a source of funding to offset costs for smaller companies
- Is this size venue right for your organization?



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Resource Analysis – Capital Costs, Funding and Fund Raising

The Rule of Construction: Pick Two Out of Three



FAST

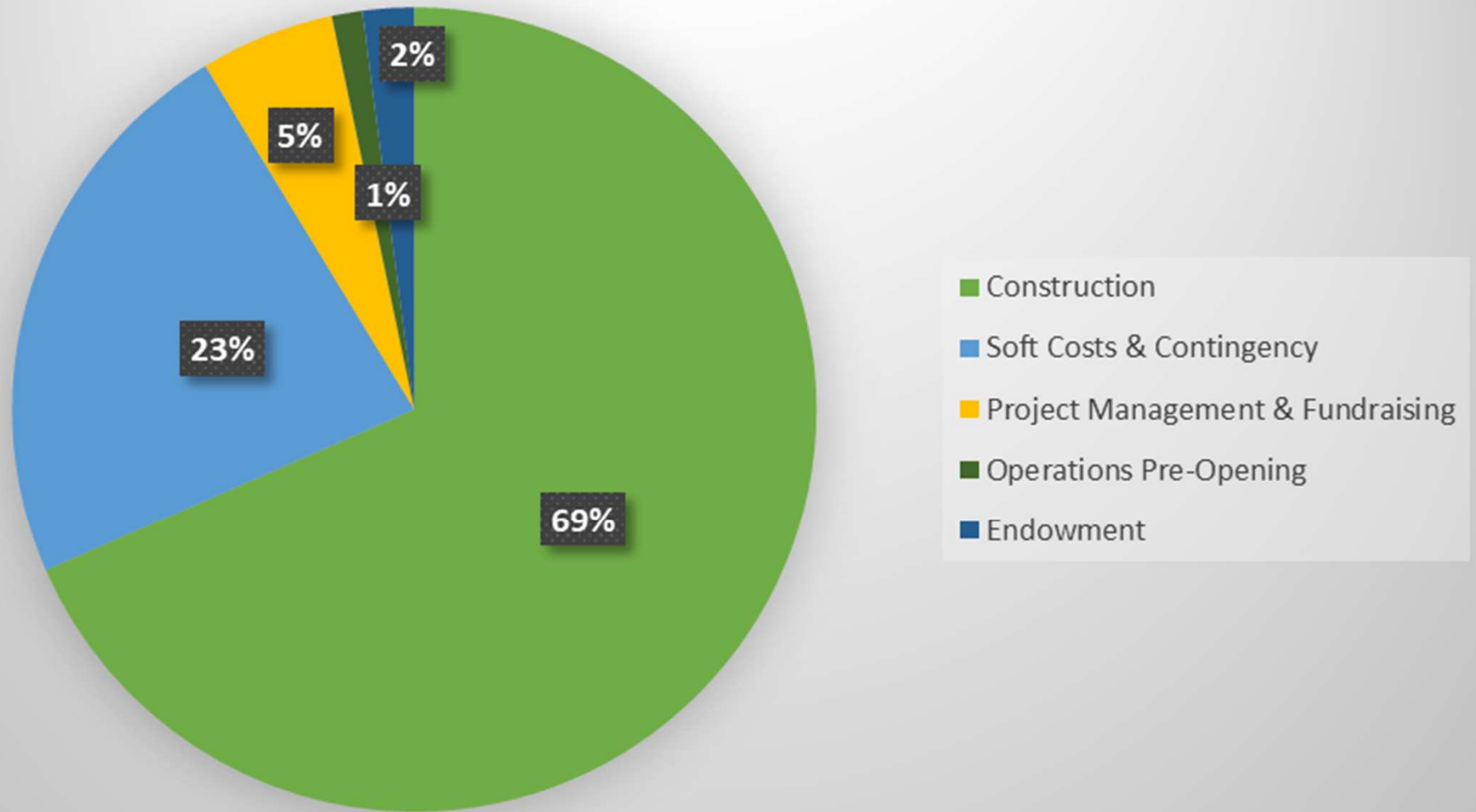


CHEAP



RIGHT

Capital Cost Ratio



Capital Funding Sources

- Governments
 - Federal, Provincial, Municipal
- Private Sector
 - Foundations
 - Donors
 - Sponsors

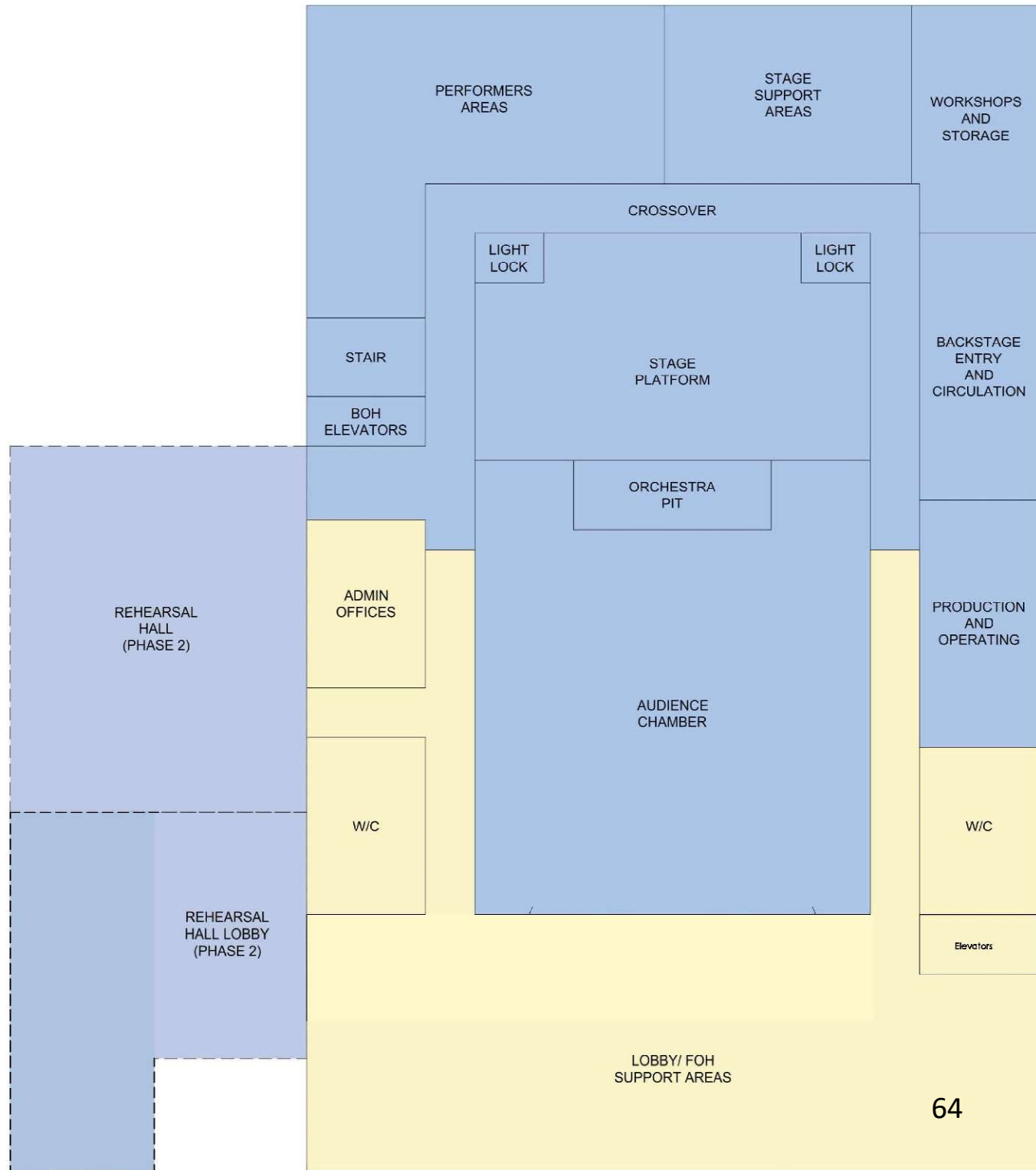
*Municipal support is critical
to access provincial and federal funding*



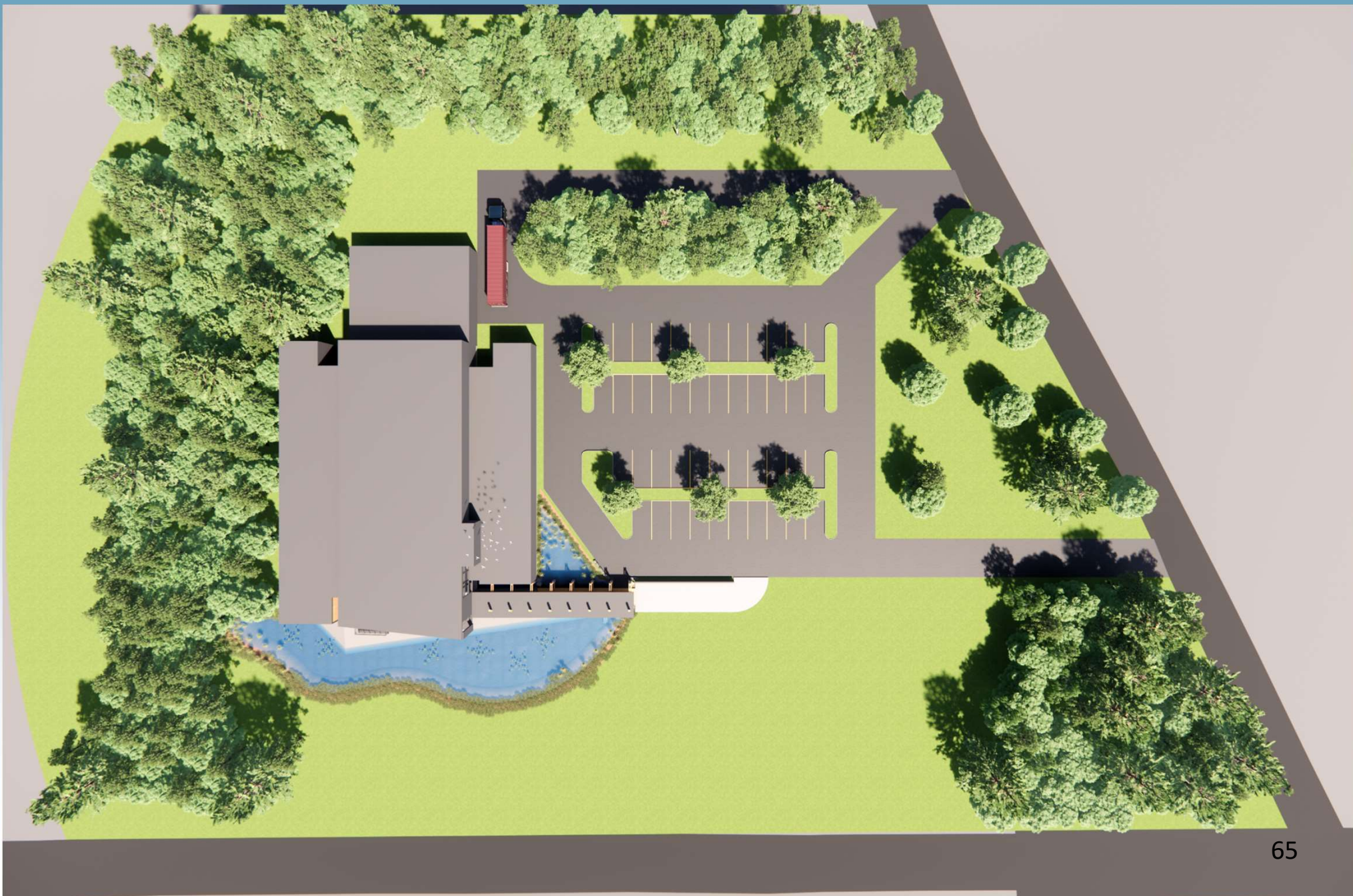
Architectural Concept

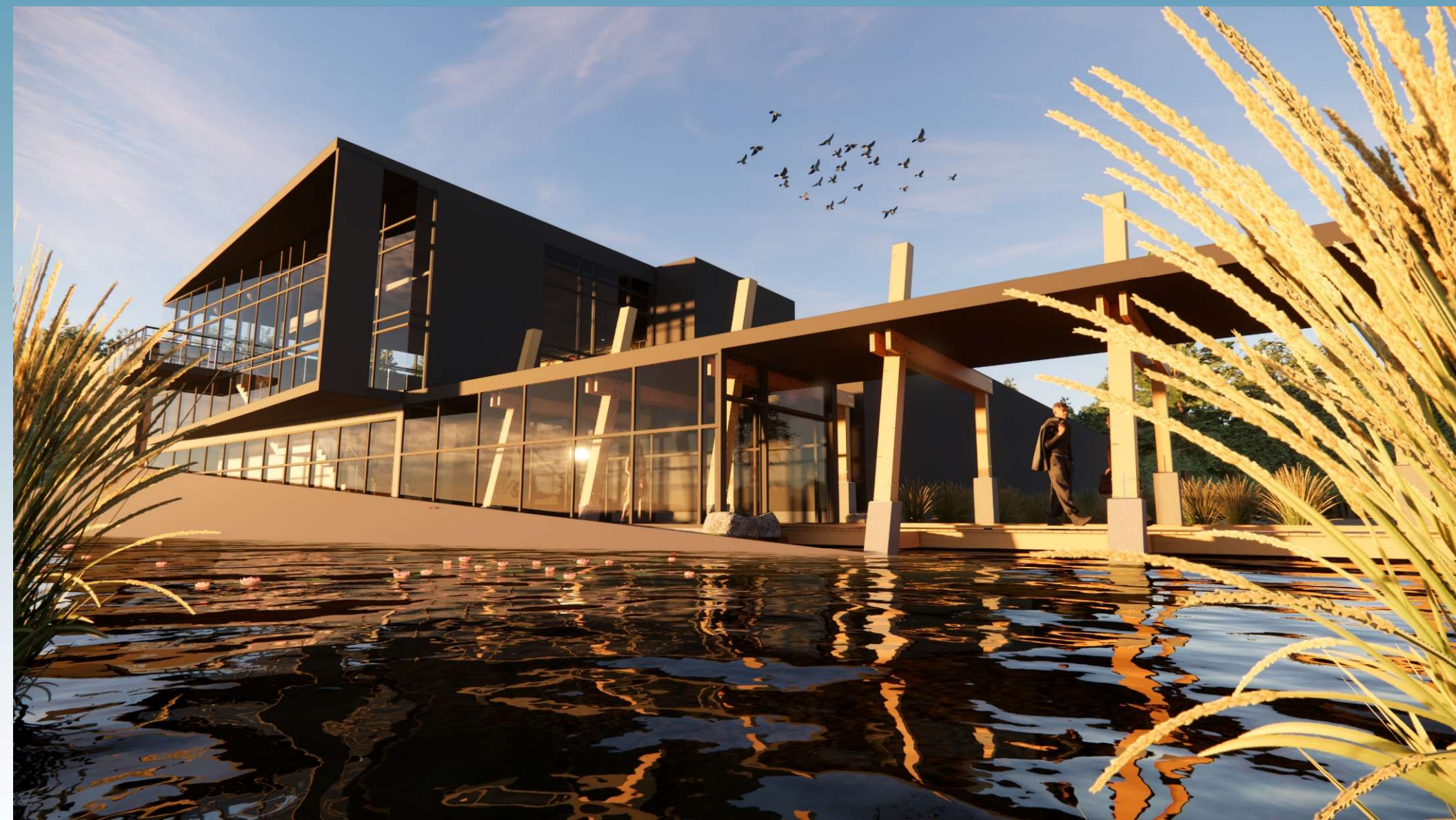
Created by Yallowega Architecture Inc.

Conceptual Floorplan



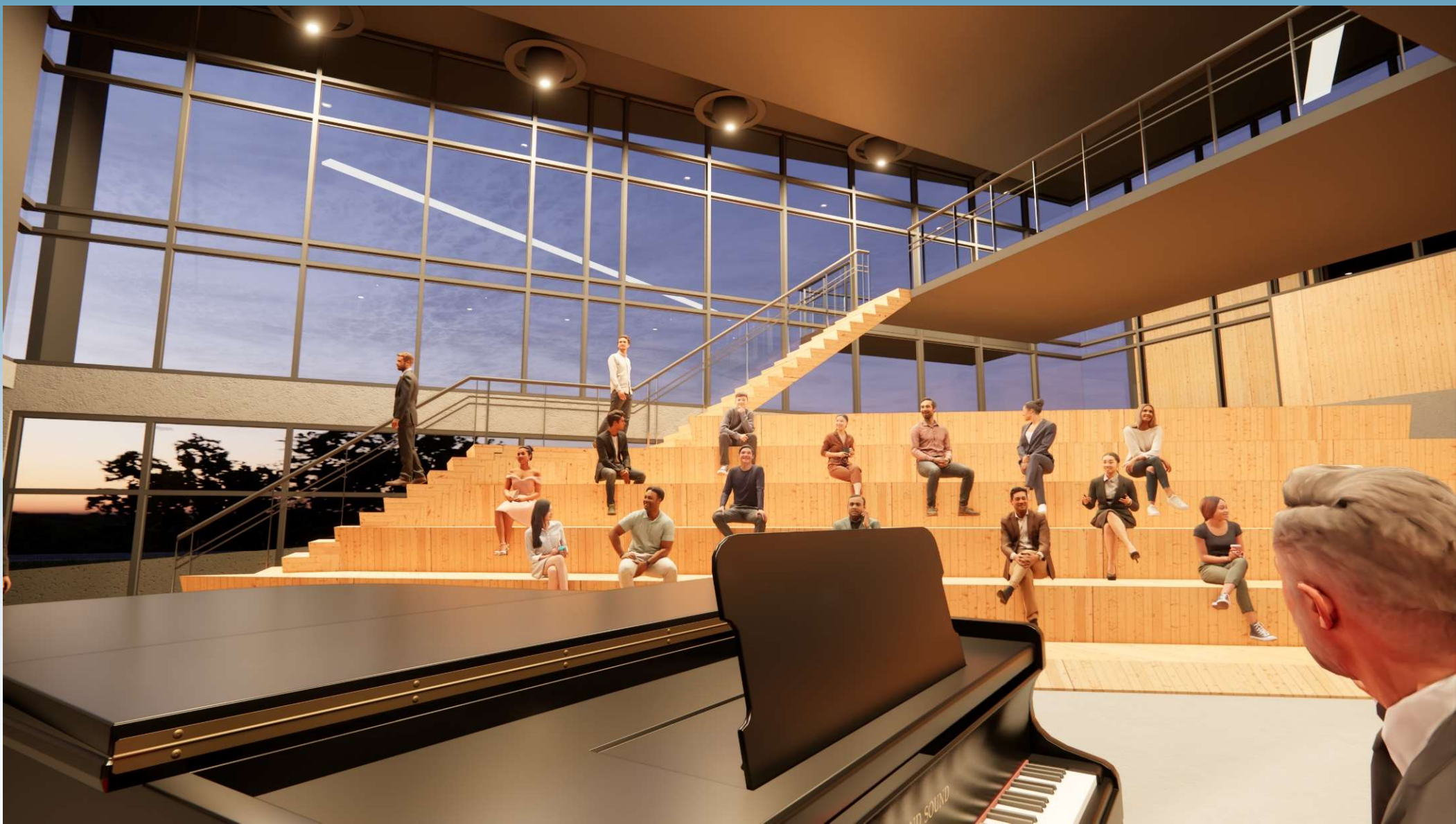
Site Plan

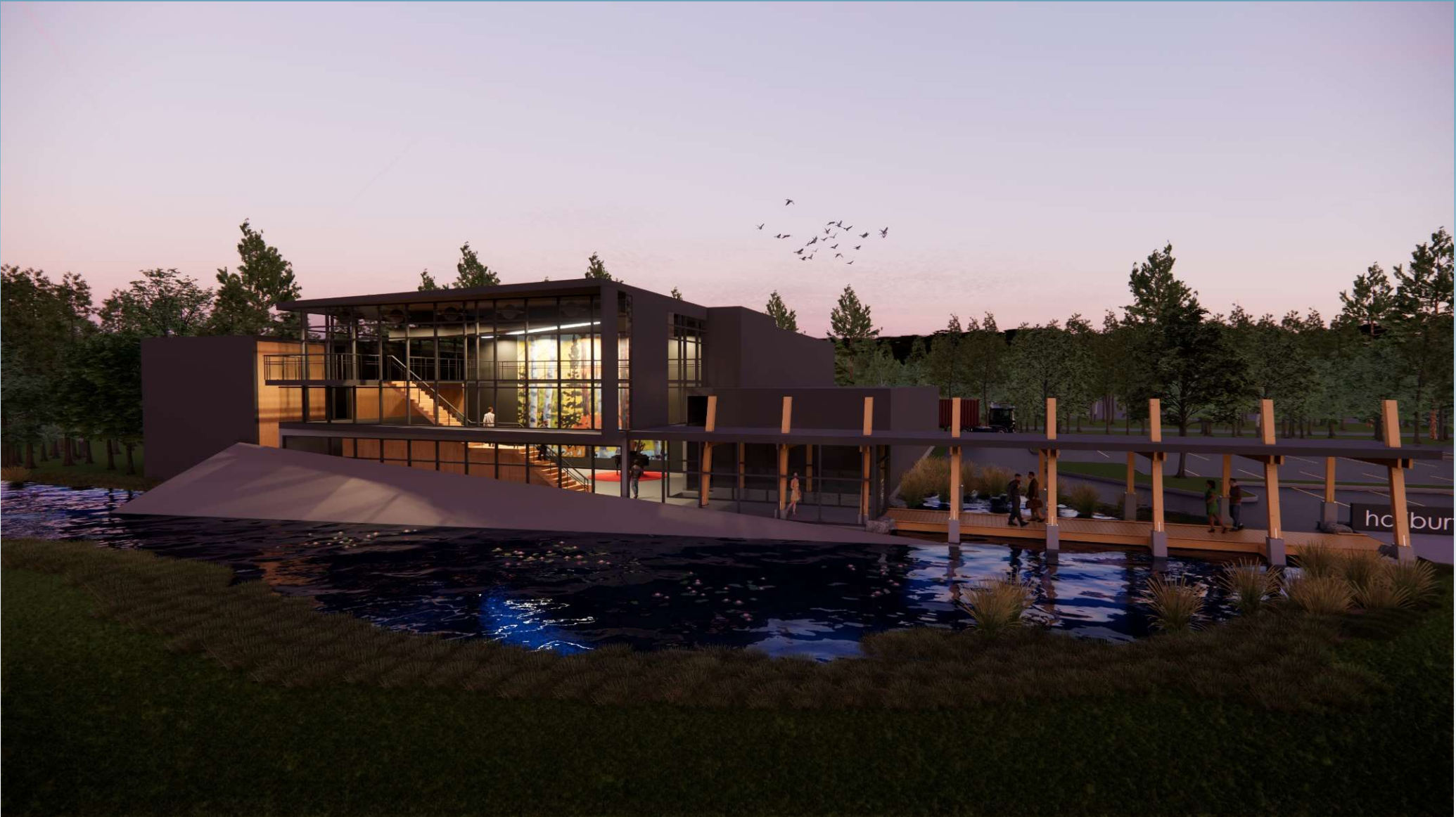














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Economic Impact

Direct and Indirect Economic Impact

Total Estimated Economic Impact of
HHPAC Operations

\$1.14 million / year

Local Impact of Capital Project

\$9.6 million



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Next Steps

It's A Process That Has Just Begun!

- Approve the project in principle
- Identify preferred Ownership/Governance/Management Model
- Identify Seed Funding
- Secure the Site
- Process with Fundraising Feasibility Study
- Explore potential partnerships
- Expand the Board, Develop Advisory Council
- Seek Financing
- Appoint
- Project Manager
- Select Architect
- Deepen Engagement with Future Users
- ++

Required: Professional Fund Raising Study

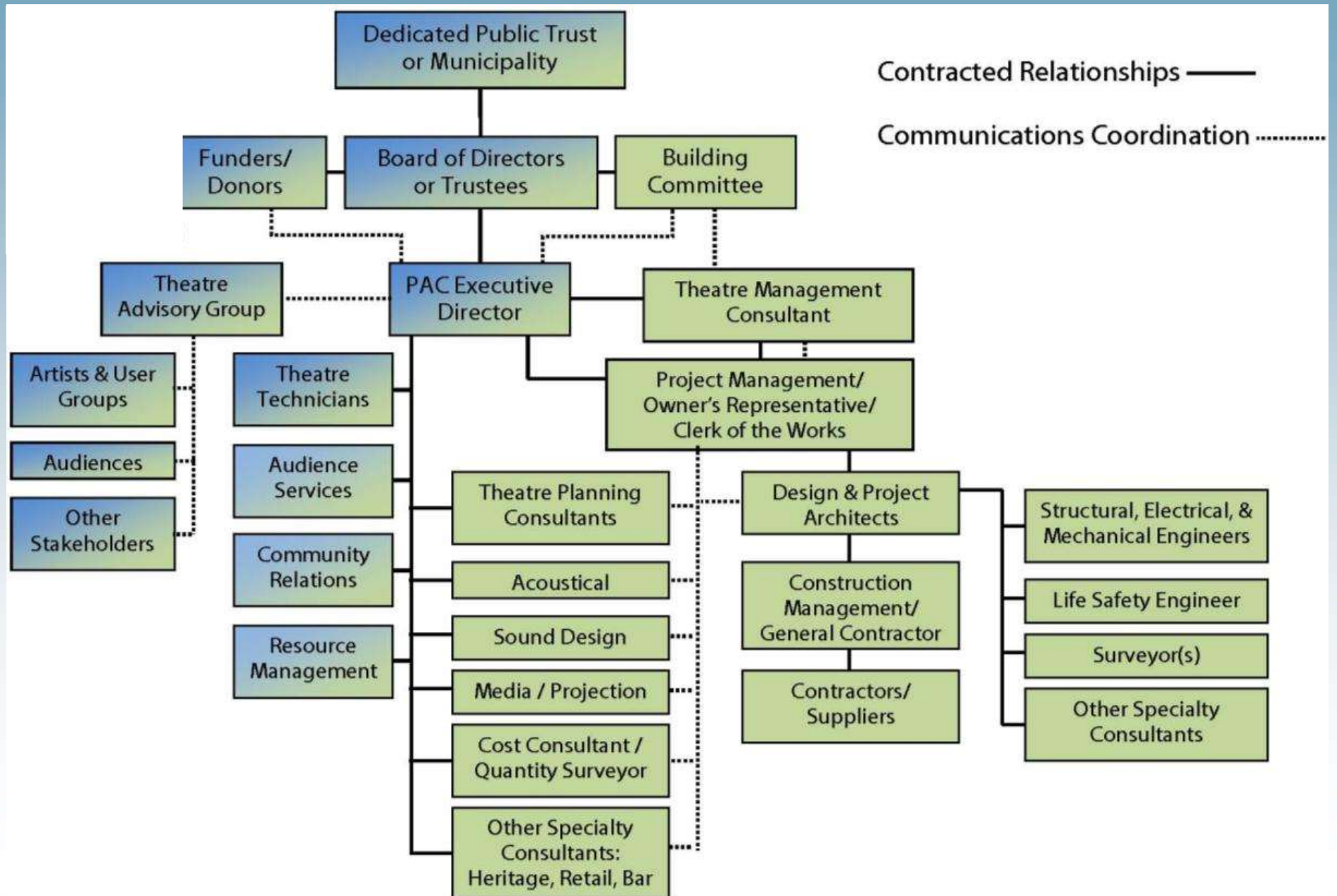
- Provide an early estimate of fund raising potential and determine whether to proceed.
- The study manager will recommend and gage the likely support of private sector investment and government funds.

Leadership from Haliburton Highlands Arts Centre Foundation

The transition to Haliburton Highlands Performing Arts Centre requires:

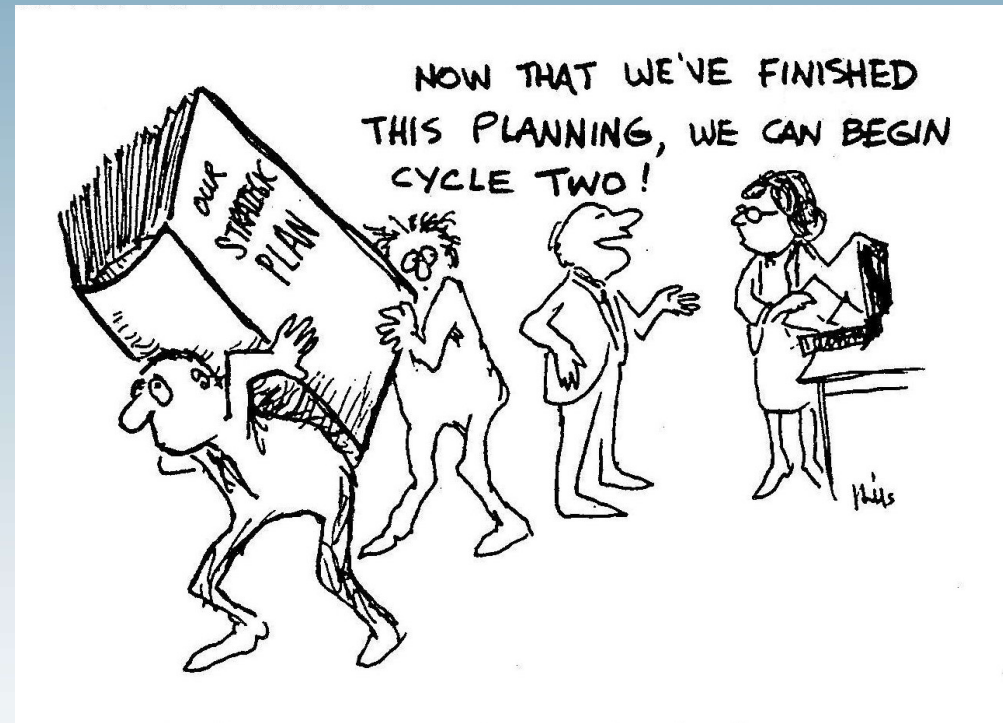
- Board growth
- More diverse expertise
- Advisory Council/ Board for project
- Professional project management staff

Sample Theatre Project Advisors/Staff/Project Org. Chart



Provide Transition Planning

1. Produce a cost effective critical path.
2. Collect fund raising pledges and finance cash flow.
3. Update business, project and communications plans as needed.





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Final Word

Americans for the Arts – 10 Reasons to Support the Arts in 2021

1. Arts unify communities.
2. Arts improve individual well-being.
3. Arts strengthen the economy.
4. Arts drive tourism and revenue to local businesses.
5. Arts improve academic performance.
6. Arts spark creativity and innovation.
7. Arts have social impact.
8. Arts improve healthcare.
9. Arts for the health and well-being of our military.
10. Arts strengthen mental health.



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Thank you!

Questions?