Social Purpose Real Estate







RENT – LEASE – OWN: Understanding the Real Estate Challenges Affecting the Not-For-Profit, Social Purpose and Cultural Sectors in Metro Vancouver

Prepared for the
Real Estate Institute of BC and the
Social Purpose Real Estate Collaborative

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CITY SPACES

Social Purpose REAL ESTATE
A COLLABORATIVE TABLE:
Helping mission-driven organizations with their real estate needs

RI The Real Estate Institute of British Columbia

Table of Contents

A. Executive Summary 1

Project Funders 1

The Real Estate Institute Of BC 1

The SPRE Collaborative 2

Survey Response 2

Highlights From Survey Findings 4

B. Introduction 7

RENT-LEASE-OWN? The Purpose And Objectives Of This Study 7

Social Purpose Real Estate 'Defined' 8

C. The Importance of the Social Purpose Sector and the Rent-Lease-Own Study 9

Scale And Range Of Services Delivered On A Not-For-Profit Basis 9

Community Sponsorship Supported By Community Volunteers 9

Raising And Channeling Donations 9

Contribution To Employment 9

Challenged To Fulfill Their Social Purpose 10

Addressing Real Estate Challenges 10

Survey As A Starting Point 11

D. The Foundation for Research: Literature Review, Case Studies and Best Practices 13

Setting The Context 13

Highlights From Selected Comparable Surveys 14

Lessons And Strategies 16

E. Real Estate Market Overview 19

Office Space Overview 19

Table 1.1: Office Supply Inventory (Square Footage) In Metro Vancouver 20

Table 1.2: Office Supply Vacancy (Square Footage) In Metro Vancouver 21

Table 1.3: Office Supply Vacancy Rate (as A Percentage) In Metro Vancouver 21

Table 1.4: Office Supply Market Rates In Metro Vancouver 22

Table 1.5: Office Supply Gross Rental Market Rates In Metro Vancouver 23

Market Potential 24

F. Policy and Regulatory Scan 25

Visioning & Strategic Planning For Not-for-Profits 25
Zoning & Other Regulations 25
Use Of Public Facilities 26
Amenity Zoning Or Density Bonus Policies 26
Property Tax Exemptions 27
Municipal Grant Programs 28
Disposition Of City Properties 29
G. Survey design 31
Organizational Profile 31
Location And Space Needs 31
Tenure And Stability 32
Affordability 32
H. Survey Implementation 33
SPRE Survey Audience And Response 33
I. Survey Results 34
Key Findings From Core Group Of Respondents: Community And Social Service Organizations, Arts And Culture Organizations, And Other SP Organizations 35
Not-for-profit Versus For-profit Status 35
Sharing Space Status 36
Current Space Size 37
Space Typology 37
Space Satisfaction 38
Space Needs 39
Tenure 41
Lease/Rental Agreements 41
Redevelopment Potential 42
Tenure Security 43
Need To Move 44
Future Move Considerations 45
Reasons To Move 46
Features Considered Important In A Future Move 47
Operating Costs 48
Key Findings From Independent Artists: 49
Independent Artists Quick Facts 49
Affordability 51

Table 1.6: Summary Table From The Affordability Follow-Up Sample Survey 52
Table 1.7: Office Supply Net Market Rates In The City Of Vancouver 53
Spatial Distribution Of Respondents 55
J. Initial Opportunities that Could Be Explored 57
Prepare A SP Organizational Database 57
Assemble A Data Collection Program 57
Revisit The Definition Of “Social Purpose” And “Social Purpose Real Estate” 57
Consider A Comprehensive Social Purpose Policy Study 57
Knowledge Building Through Mentoring And/or Training Programs 58
Consider A Co-Location Online Information System Pilot Project 58
Build On The SPRE Toolkit Series 59
Revenue Generation 59
Real Estate Sector Workshop 59
Communicate Key Elements Of Study To Relevant Professional Organizations 60
Consider Preparing A Municipal Tools Page For SPRE Website 60

Appendices

Appendix A: Literature Review and Background Research References
Appendix B: Survey Questions
Appendix C: Survey Summary Tables
Appendix D: Follow-Up Sample Survey

List of Maps

SP Organizations Current Space Size

Map 1A: SP Organizations Current Space Size - City of Vancouver
Map 1B: SP Organizations Current Space Size - Downtown Cluster
Map 1C: SP Organizations Current Space Size - Gastown Cluster & Surrounding Area
Map 1D: SP Organizations Current Space Size - Fairview/Granville Island Cluster
Map 1E: SP Organizations Current Space Size - Grandview-Woodland Cluster
Map 1F: SP Organizations Current Space Size - Kitsilano Cluster
Map 1G: SP OrganizationsCurrent Space Size - Main Street Cluster
Map 1H: SP Organizations Current Space Size - Strathcona and Surrounding Area Cluster

SP Organizations Space Needs

Map 2A: SP Organizations Space Needs: City of Vancouver
Map 2B: SP Organizations Space Needs: Downtown Cluster
Map 2C: SP Organizations Space Needs: Downtown Eastside Cluster
Map 2D: SP Organizations Space Needs: Fairview/Granville Island Cluster

Map 2E: SP Organizations Space Needs: Gastown Cluster
Map 2F: SP Organizations Space Needs: Grandview and Surrounding Area Cluster
Map 2G: SP Organizations Space Needs: Main Street Cluster

SP Organizations Tenure

Map 3A: SP Organizations - Rent
Map 3B: SP Organizations - Lease
Map 3C: SP Organizations - Sub-Lease
Map 3D: SP Organizations - Subsidized
Map 3E: SP Organizations - Own

SP Organizations Affordability

Map 4A: SP Organizations Affordability: City of Vancouver
Map 4B: SP Organizations Affordability: Downtown Eastside and Surrounding Area Cluster
Map 4C: SP Organizations Affordability: Fairview Cluster
Map 4D: SP Organizations Affordability: Strathcona and Surrounding Area Cluster

SP Organizations Transportation

Map 5A: SP Organizations Would Move for Transit

SP Organizations Co-Location Potential

Map 6A: SP Organizations Co-Location Potential within the City of Vancouver
Map 6B: SP Organizations Co-Location Potential: Downtown Eastside and Surrounding Area Cluster
Map 6C: SP Organizations Co-Location Potential: Grandview Cluster
Map 6D: SP Organizations Organizations Willing To Move for Co-Location

A. Executive Summary

The not-for-profit sector plays a significant role in British Columbia's economy, providing a range of important services for communities, with an estimated 20,000 not-for-profit and voluntary organizations operating throughout the province[1]. The sector's contribution to the provincial economy is further highlighted in that, in 2003, it had total annual revenues of $11 billion and employed 147,000 people. Independent artists also play a major role in the economy, and most Metro Vancouver neighbourhoods have a higher proportion of artists in the labour force than the national average.

However, securing land, buildings, and tenancy for not-for-profit, social purpose, and cultural organizations has been increasingly challenging in the Metro Vancouver area [2] due to issues of affordability and availability of suitable space. Also challenging in this respect is the ability to assist these organizations in their pursuit of affordable and suitable space due to the lack of comprehensive data that confirms these issues; without the data, it is difficult to prepare business cases to support these organizations.

Supporters of the Social Purpose ("SP") sector have recognized the data gap and, as such, have commissioned a RENT-LEASE-OWN survey to gain a more thorough and broader understanding of the real estate situation facing not-for-profits, social purpose, and cultural organizations in Metro Vancouver. The survey was launched in October 2012, and this report outlines the process and key findings obtained from the survey with respect to space needs, tenure, stability, and affordability.

Project Funders

RENT-LEASE-OWN is a collaborative study by the Real Estate Institute of British Columbia (REIBC) and the Social Purpose Real Estate Collaborative (SPRE). The study was also generously supported by the City of Vancouver Cultural Services / Social Development, the Real Estate Foundation of British Columbia, Vancity, and the Vancity Community Foundation.

The Real Estate Institute of BC

REIBC is an organization of diversified real estate professionals whose mission is to advance and recognize excellence in education, knowledge, professional development, and business practices uniting all sectors of the real estate industry. Through their mission, they have collaborated with SPRE through the Industry Funding Grants Program that was made available through the Real Estate Foundation of British Columbia. It is through this funding that the RENT-LEASE-OWN study is supported, providing an opportunity for REIBC members and the larger real estate community to understand the challenges and opportunities within the SP sector. REIBC has been proud to facilitate this piece of research.

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[1] National Survey of Nonprofit and Voluntary Organizations (2003). http://www.imaginecanada.ca/files/www/en/library/nsnvo/nsnvo_report_english.pdf

[2] Metro Vancouver municipalities include the "members" of Metro Vancouver: Electoral Area A, Bowen Island Municipality, City of Burnaby, City of Coquitlam, City of Langley, City of New Westminster, City of North Vancouver, City of Pitt Meadows, City of Port Coquitlam, City of Port Moody, City of Richmond, City of Surrey, City of Vancouver, City of White Rock, Corporation of Delta, District of Maple Ridge, District of North Vancouver, District of West Vancouver, Township of Langley, Tsawwassen First Nation, Village of Anmore, and Village of Belcarra.

The SPRE Collaborative

The Social Purpose Real Estate Collaborative (SPRE) is an informal consortium of funders and investors who came together in the spring of 2009 to develop a collective understanding of the use of social purpose real estate as both a sustainability strategy for not-for-profit partners and investees, and to help secure real estate assets for community purposes. The consortium includes the City of Vancouver Cultural Services, Social Development and DTES Planning Group; the Central City Foundation; the Real Estate Foundation of British Columbia; Renewal Partners and Tides Canada Foundation; and both Vancity and the Vancity Community Foundation.

The SPRE Collaborative has defined *Social Purpose Real Estate* as property and facilities used by mission-based and not-for-profit organizations and investors for the purpose of community benefit, and to achieve blended value returns. These may include property that is rented, leased, or owned. Within this context, SPRE has three (3) main strategies:

STRATEGY ONE

To create and deliver tools (financial and non-financial) that will support the development of, and investment in, social purpose real estate, and to provide more sustainable opportunities for leasing and renting, and to increase the number of community-owned assets and shared spaces.

STRATEGY TWO

To produce and disseminate knowledge, resources, and information that will build the capacity of the sector in the area of social purpose real estate.

STRATEGY THREE

To undertake and support research and policy that will: demonstrate the need for, and value of, social purpose real estate development in communities; facilitate the identification of opportunities; and, promote further private and public investment in social purpose real estate. Research will help to inform investors, stakeholders, government, the sector, and other interested parties and develop a more enabling environment for social purpose real estate.

Survey Response

The feedback on the SPRE RENT-LEASE-OWN study from the SP sector was very positive, with a large response of 592 counted surveys, 407 of which were completed in-full. The first notable observations from the survey response concluded that:

- Over 86% of respondents were located within the City of Vancouver; and
- Over 66% of respondents self-identified as Arts and Culture as their primary activity. Nearly 17% identified as Community or Social Service, and the remainder (advocacy, employment and training, health services, housing, recreation and sport, other) comprised of the other 16%.

It was hoped that this study would capture a broader audience, encompassing SP organizations throughout Metro Vancouver. This would help SPRE and supporters understand the real estate issues on a regional level, and to potentially compare real estate challenges from one municipality to another. More specifically, it was hoped that obtaining information throughout Metro Vancouver would allow for:

- Comparison of baseline real estate market rates ($ per square foot per year) inventory, and vacancy rates between different Metro Vancouver municipalities to determine which municipalities are more affordable, and have more available or suitable space for SP organizations. Determine if SP organizations are paying more, less, or the same compared to other municipalities within Metro Vancouver; and
- Determining if there are a higher concentration of SP organizations in some municipalities compared to others within Metro Vancouver. Correlate the spatial concentration with the background policy and regulatory research to determine if this concentration is attributed to more favourable policies or regulations in certain municipalities, revealing which municipalities (if any) foster a supportive real estate environment for SP organizations to thrive.

However, the overwhelming majority of respondents were located within the City of Vancouver and there were not enough survey respondents located elsewhere to make accurate comparisons. As such, the **summary of survey results outlines only those respondents located within the City of Vancouver and are not representative of Metro Vancouver as a whole; all other respondents were excluded from the reported aggregated data.**

In addition, there were not enough respondents under several primary activities (self-identified by respondents) for each category to be reported equally. As such, the data was organized into four (4) categories for reporting purposes:

(1) **Community and Social Service Organizations** (100 surveys);

(2) **Independent Artists** (191 surveys);

(3) **Arts and Culture Organizations** (which excludes independent artists) (205 surveys); and,

(4) **All Other SP Organizations** (96 surveys) (a catch-all grouping that consists of advocacy, employment and training, health services, housing, recreation and sport, and other categories).

Another limitation to the survey was the lack of information obtained on space costs and affordability. The majority of survey respondents did not answer a breakout of costs, so there was not enough data collected to report on typical base rent nor occupancy costs. Furthermore, there also appeared to be confusion and varying interpretations amongst survey respondents regarding the cost per square foot ($/SF) question, as there were numerous outlying responses that were illogical compared to real estate norms.

As a result, a follow-up sample survey on space costs and affordability was re-distributed to survey respondents. There were a total of 26 completed follow-up surveys, which provided insight (albeit limited) into the typical space costs paid by SP organizations.

Highlights from Survey Findings

A summary of the SPRE RENT-LEASE-OWN survey is listed below, and outlined in greater detail in Section I: Survey Results, with full tables provided in Appendix C: Survey Summary Tables.

- 52% Community and Social Service organizations, 40% Arts and Culture organizations, 39% Other SP organizations already share space with another organization.
- 54% of Community and Social Service organizations, 49% of Arts and Culture organizations, and 45% of Other SP organizations would consider co-location opportunities. In fact, 28% of Community and Social Service organizations, 23% of Arts and Culture organizations, and 26% of Other SP organizations are already building relationships with other organizations and exploring ways to prepare co-location feasibility studies together.
- Distinct clusters of SP organizations are formed in a number of City of Vancouver neighbourhoods and are located primarily along arterials or corridors that are part of Vancouver's Frequent Transit Network (FTN). The most notable clusters are found within the neighbourhoods of Mount Pleasant, Grandview-Woodland, Strathcona, Downtown and the Downtown Eastside.
- SP organizations typically occupy small unit spaces, ranging from less than 250 square feet to 5,000 square feet.
- 73% of Community and Social Service, 70% of Arts and Culture, and 66% of Other SP organizations require more space within the next 5 years. For those who need more space do not need very much — typically aspiring to less than 500 square feet, or less than 1,000 square feet.
- SP organizations identified meeting rooms and flex space or multi-purpose rooms as important space need components that they do not currently have access to, but they would greatly benefit from if made available to them.
- Most SP organizations require more space in neighbourhoods on the periphery of the Downtown, with a significant number of Community and Social Service organizations requiring space in the Mount Pleasant neighbourhood.
- The top 3 space typologies amongst SP organizations within the City of Vancouver are: (i) office space; (ii) community facilities; and, (iii) residential building / home-based.
- Space typologies that are uncommonly utilized by SP organizations within the City of Vancouver are institutional spaces, retail, and heavy industrial / production spaces.
- Most SP organizations are renters or leasers on short-term agreements, with a higher proportion of Community and Social Service and Other SP organizations occupying donated/subsidized space. Specifically, Community and Social Service organizations are comprised of 27% renters, 23% leasers, and 24% occupying subsidized space. Other SP organizations are comprised of 33% renters, 24% leasers, and 32% occupying subsidized space. Arts and Culture Organizations are comprised of 39% renters, 25% leasers, and 12% occupying subsidized space.

- Community and Social Service organizations and Other SP organizations are generally satisfied with their current space (67% and 77%, respectively).
- 69% of Community and Social Service organizations, 52% of Arts and Culture organizations, and 71% of Other SP organizations feel at least somewhat secure or very secure in their current space, and feel confident in their ability to renew their lease or maintain their space in the long-term.
- Location is very important to SP organizations' mandate and effectiveness because of proximity to their clients, as well as being "known" and "recognized" for their location.
- Most SP organizations want to remain where they are currently located, if they can, but if they would have to move, they would try to remain within the same neighbourhood (or within the City of Vancouver, at the least) in order to serve their clients.
- One of the key drivers amongst SP organizations to potentially move is to locate within closer proximity to public transportation.
- It appears that SP organizations are currently paying comparable to Class B and Class C market rates for office space in Vancouver.
- 85% of Community and Social Service organizations and 80% of Other SP organizations pay less than 30% of their annual expenses/operating costs towards their rent/mortgage and other building expenditures such as property taxes and utilities. Comparatively, 21% of Arts and Culture organizations are paying more than 50% of their annual expenses towards space costs.

Based on the basic survey results and considering the over-arching goals of the SPRE RENT-LEASE-OWN study, some initial opportunities that the SP sector supporters could consider exploring includes:

- Prepare a SP Organizational Database;
- Assemble a Data Collection Program;
- Revisit the definition of "Social Purpose" and "Social Purpose Real Estate";
- Consider a Comprehensive Social Purpose Policy Study;
- Knowledge building through mentoring and/or training programs for SP organizations;
- Consider a Co-Location Online Information System Pilot Project;
- Build on the SPRE Toolkit Series;
- Revenue generation projects;
- Real Estate Sector Workshop;
- Communicate key elements of the study to relevant professional organizations; and,
- Consider preparing a Municipal Tools page for SPRE website.

Additional information on these initial opportunities are outlined in Section J: Initial Opportunities that Could Be Explored.

B. Introduction

"We have been looking for space but we cannot afford to rent a commercial space on our own. We could possibly share the rent for a space or locate inside another not-for-profits' space in order to help them with their rent while giving us the advantage of better space."

— Vancouver Guild of Fabric Art, 2012

RENT-LEASE-OWN? The Purpose and Objectives of this Study

The first of it's kind in Metro Vancouver, this study focuses on baseline information obtained through a mass research survey of nearly 600 SP organizations in Metro Vancouver with respect to real estate space needs, tenure and stability, location needs, and affordability. The initial key goals of this study included:

- Knowledge and understanding of the rates and terms for not-for-profit real estate in Metro Vancouver in the context of the commercial real estate market, including baseline data that can be tracked and monitored over time;
- Ability to develop knowledge in the SP sector, and from that skills and capacity to successfully engage in real estate activities including strategic positioning to move from rent to lease and lease to own;
- Ability to engage with real estate sector professionals with credible data and analysis;
- Ability to inform targeted land use policy at the local government level with more contemporary tools that address barriers to the SP sector community land use;
- Create a case for support for funders and investors to invest in social purpose real estate; and,
- Enhancement of sustainable real estate and land use practices enabling overall community and social sustainability.

Further, this study began with exploring five (5) major topic areas for research, ones that would steer the direction for the types of questions to ask and results sought through the mass survey:

1. Extracting models for SP organizations, such as co-locating or sharing real estate with other organizations;
2. The challenge of affordability for new initiatives (referring to both SP organizations' internal aspirations and the pursuit of new models/structures to support SP organizations), especially in the context of the high cost of accessing real estate in Metro Vancouver;
3. Size and capacity of not-for-profit societies and the resources required for planning and constructing their internal organizational projects;
4. Financing and fundraising issues – the challenge of fundraising in what has become a more complex and competitive environment; and,
5. Best use of society's own real estate to meet their social purpose (often now called re-generation, where organizations re-configure or redevelop their property to better suit their needs).

In addition, this study provides an overview of similar surveys and studies in comparable markets including their issues, challenges, and tools to overcome real estate barriers. These case studies were referenced when formulating the survey questions (what to ask, and how to phrase). Also highlighted in this report is a selected representation of current policy and regulatory measures that support SP organizations in various municipalities across Metro Vancouver.

Social Purpose Real Estate 'Defined'

At the core of this research study is defining what Social Purpose Real Estate (SPRE) is, and what types of organizations classify as SPRE. Generally, SPRE can be defined in two parts: (i) social purpose, meaning organizations with a mission to provide community benefits; and, (ii) real estate, in this context referring to the property and/or facilities either rented, leased, or owned and operated by social purpose organizations. Together, SPRE refers to property and facilities owned and operated by organizations and investors for the purpose of community benefit, and to achieve blended value of returns.

For the purpose of this study, SP organizations were categorized by primary activity: (i) Advocacy; (ii) Arts and Culture; (iii) Childcare; (iv) Community or Social Service; (v) Employment and Training; (vi) Health Services; (vii) Housing; (viii) Recreation and Sport; or (ix) Other. For the survey, respondents were asked to self-identify their primary activity (with an opportunity to list other activities they are involved in, if applicable).

Based on the number and types of survey respondents (and further outlined in Section H: SPRE Survey Audience and Response), the organization types were grouped into four (4) distinct categories that will be referred to herein, as:

(1) **Community and Social Service Organizations**;

(2) **Independent Artists**;

(3) **Arts and Culture Organizations**; and,

(4) **All Other SP Organizations** (a catch-all grouping that consists of advocacy, employment and training, health services, housing, recreation and sport, and other categories).

The collected survey data and analysis is reported by these four categories.

C. The Importance of the Social Purpose Sector and the Rent-Lease-Own Study

The not-for-profit sector is an essential part of Canadian society and helps to define the country. Of 39 countries studied, Canada has the second largest not-for-profit sector relative to population size. There are over 161,000 not-for-profit organizations in Canada and some 20,000 in BC. The majority of these not-for-profits operate locally at a municipal level.

The broad sectors covered by this study have immense importance in Metro Vancouver, British Columbia, and throughout Canada. The not-for-profit sector is best documented nationally and provincially, but the for-profit social purpose sector and independent artist bring many of the same benefits to Metro Vancouver and experience the same challenges.

Scale and Range of Services Delivered on a Not-For-Profit Basis

Most people in their lives will use the services of a not-for-profit organization services. The range of services is widespread, and the sector serves all incomes, ages, household types, interests, and needs. Social services are provided from infant care through to hospices. In BC there are over 600 not-for-profit societies that provide housing. Arts and culture that enrich our lives are almost entirely not-for-profit based and comprise over 10% of all not-for-profit organizations; sport and recreation make up 17%, social services make up 9%, and religious organizations comprise of 19%. Over 80% of not-for-profits in BC deliver services directly to people (as opposed to serving other organizations).

Community Sponsorship Supported by Community Volunteers

The SP sector provides the vehicle for the direct engagement of the community in the delivery of these services either as board members or assisting in the provision of these services. Through the SP sector individuals in our society both provide and receive services. In BC, almost 1.5 million people volunteer in the sector, and in Canada that figure equates to 19 million.

Raising and Channeling Donations

Although government funding is often channeled through not-for-profit sector donations from the community and private sector, it is essential to support the range of services it serves. In 2011, in Canada a total of $8.5 billion charitable donations were made, and in BC this equated to $1.3 billion. The value of charitable donations in Vancouver was $753 million. The median donation per taxfiler at $390 was amongst the highest in the country (Statistics Canada).

Contribution to Employment

Full-time and part-time employees (excluding hospitals and secondary education institutions) accounted for some 114,000 people in 2003.

Similar information to that available to the provincial and federal SP sector does not exist at the Metro Vancouver level. The City of Vancouver as the core of Metro Vancouver is home to the majority of SP organizations. These provide a wide range of services through social services, arts and culture, and sports. In the housing field alone there are over 100 not-for-profit societies managing over 20,000 social housing units within the City, and 279 in Metro Vancouver managing 979 buildings with 38,000 units.

Artists play a significant but poorly documented role in the local economy. A study in 2005 (Hill Strategies by postal district) showed that BC had the highest percentage of artists in the labour force and almost all postal districts in Metro Vancouver have higher concentrations than the national average, with East Vancouver neighborhoods exceeded 4% and 5%.

Challenged to Fulfill their Social Purpose

Perhaps now more than ever, not-for-profit, social purpose, and cultural organizations are facing significant challenges in finding and maintaining secure, appropriate, and affordable spaces for their programs, services, and administrative offices. This is especially true for those organizations operating in Metro Vancouver, which has been numerously ranked as one of the least affordable metropolitan markets in the world.

Much of the "real estate" crisis in Metro Vancouver has been focused on *housing* affordability issues. According to the 9th Annual Demographia International Housing Affordability Survey (based on 3rd quarter 2012 data), the City of Vancouver ranked second (after Hong Kong) as the most unaffordable metropolitan housing market in the world[3]. Part of the housing affordability issue can be attributed to the high demand for land and associated property costs, which ultimately, impacts not just housing prices, but prices for all space typologies: office, commercial, retail, institutional, and industrial.

The not-for-profit, social purpose, and cultural organizations in Vancouver are not immune to the global real estate market volatility and affordability crunch occurring locally. These organizations must maneuver within the real estate market in order to serve communities (who are also facing the same affordability and space availability challenges in their own respect). To operate successfully in Metro Vancouver, the SP sector needs affordable property appropriately designed to suit their needs. At the end of the day, however, the real estate challenges threatens the sustainability of these organizations, limits access to needed services, and weakens community vitality.

Addressing Real Estate Challenges

By building the capacity of not-for-profit organizations, funders, government, investors, and real estate professionals can assist SP organizations by way of advancing the development of social purpose real estate. This approach can strengthen and support communities by:

- *Enhancing the sustainability, capacity, and assets of the not-for-profit sector, including financial, social, and built capital.* Supporting ownership can allow organizations to build equity and leverage resources, experience cost savings, ensure more secure tenancy, and can foster greater collaboration among organizations sharing space;
- *Maintaining and securing community-owned assets to better meet community social, cultural, economic, and environmental needs.* By preserving and growing the inventory of property and spaces available for, and dedicated to, community benefit and service, there can be more confidence and assurance in the quality spaces available to, and affordable for, community organizations, located in the appropriate neighbourhoods and locations;

[3] Wendell Cox (Demographia) & Hugh Pavletich (Performance Urban Planning) (2013). 9th Annual Demographia International Housing Affordability Survey. http://demographia.com/dhi.pdf

- *Contributing to the revitalization of divested communities or neighbourhoods.* By supporting organizations to purchase and/or renovate property, there can be a contribution to economic and social revitalization of these neighbourhoods without displacement of residents and services.
- *Leveraging capital to achieve blended returns.* Foundations, mission-based investors, and financial institutions can make investments in social purpose real estate that can further social or environmental goals, enhance community impact, and provide financial returns.

Further to these challenges, SPRE has mapped the funding available for SP organizations related to all aspects of development, ownership, and operation and have found the key weaknesses to be [4]:

- Limited ownership by not-for-profits and SP organizations;
- Limited programs or sources of funds for facility maintenance and operation; and,
- Limited programs or sources of funds for recapitalization.

Survey As a Starting Point

While the SP sector underpins much of the social and economic fabric of our society, there is no real data on the real estate scenarios under which they operate. It is widely understood that the SP sector struggles with affordability of securing premises in which to deliver their programs and services. It is also understood that the SP sector lacks the knowledge, skills, and abilities to successfully engage in real estate dealings. However, there is no baseline data to understand what the true barriers are that limit real estate activities of this sector, or the possible solutions.

It is within this context that SPRE and Project Funders have embarked on a comprehensive, evidence-based study to understand the current and emerging real estate factors affecting SP organizations within Metro Vancouver. The study aims to understand the root issues as to how real estate scenarios impact the effective delivery of SP organizations' programs and services, based on factual-evidence derived by survey responses from SP organizations. With this direction, the SPRE RENT-LEASE-OWN study can confirm and/or disprove assumptions of this sector's real estate situation, as well as identify opportunities to resolve key challenges.

[4] Credit provided to the SPRE Research and Policy Sub-Committee.

D. The Foundation for Research: Literature Review, Case Studies and Best Practices

In the lead up to the development of the survey questions, a web search was undertaken to identify research reports and other surveys from comparable markets. It was found that only a small number of surveys had been published online that were similar in scope or intent to the SPRE RENT-LEASE-OWN study. There are a few similar studies completed in Canada, however, these focused on the arts and cultural sector and not the SP sector as a whole. Compared to other research studies, the RENT-LEASE-OWN study is truly unique in Canada because of its focus on social purpose organizations.

A number of research reports considered the space needs of the not-for-profit sector, with some focusing more specifically on the arts and culture sector. Some studies commented on the status of not-for-profit real estate issues and facilities needs.

This short background review presents highlights from these research studies with the original intention to set the context for the survey project, present highlights from two studies of particular relevance, identify potential topic areas and considerations for the SPRE RENT-LEASE-OWN survey design, and present some lessons and strategies that are of interest to the project on a broader scale. A complete reference list of surveys and documents is included in Appendix A.

Setting the Context

Two recent studies specifically considered the situation facing the local arts and culture community, which offers some background information and potentially sets the context for Metro Vancouver's not-for-profit sector as a whole. One of these studies, a 2011 artists studio feasibility study[5], included a web survey of Vancouver artists (107 responses; 17% response rate). Some key findings from this study included:

- The majority of respondents (58%) shared their space with at least one other artist, although 78% reported they prefer to work alone. More than half (57%) work exclusively in a studio space, 26% in home and studio combination, and 17% were home based;
- The median rent was found to be $1.15 per square foot per month (or $13.80 per square foot per year). Over 25% paid more than $1.50 a square foot per month (or $18.00 per square foot per year);
- The median income from artistic endeavours was $8,000 per year, with 23% earning $15,000 or more per year. Half the respondents reported that 40% or more of their annual income was from art sales; 25% reported that 80% or more of their income was from art; and
- The typical studio estimated to be 300 to 450 square feet and was shared by two or three artists, each contributing an average of approximately $350 of rent per month including utilities.

[5] McClanaghan & Associates (2011), Feasibility Study on Eastside Vancouver Artist Studio Space. Prepared for the Eastside Culture Crawl Society.

A 2007 Masters thesis (**Handbook for Vancouver Artists**[6]) also described the situation for Vancouver artists based on a review of literature, policy documents, and case studies. According to the author, it had become increasingly difficult for artists to secure affordable studio space, especially in central areas. Artists tended to seek out spaces that were cheaper in price, within close proximity of the core downtown areas, within walking distance to public transit, and usually in older buildings. In Vancouver, artists were concentrated in Strathcona, the Downtown Eastside, Grandview-Woodlands, and Mount Pleasant. The author also speculated that there had been a lack of effective partnership between different groups interested in affordable studio space for artists.

Highlights from Selected Comparable Surveys

Comparable surveys were reviewed in order to help inform the RENT-LEASE-OWN survey design, such as the types of question that could be asked and how to phrase those questions.

A 2000 survey and research project in San Francisco, *Not-For-Profits At Risk: The Space and Occupancy Crisis Facing San Francisco's Not-For-Profit Community* [7], was found to be particularly comparable to the SPRE RENT-LEASE-OWN study in terms of its purpose and scope. The study was undertaken as a result of a perceived crisis of affordability and availability of space for the City's not-for-profit groups. Due to the complexity of space use and risk for not-for-profits, the study included four components — analysis of 301 written surveys, five focus groups, 15 key informant interviews, and six case stories. This allowed for quantitative analysis of factors such as square footage used and monthly occupancy expenses, and a qualitative understanding of not-for-profit space usage, client proximity concerns, and responses to suggested strategies. The study identified several key findings of relevance and interest to the SPRE RENT-LEASE-OWN study.

- In 2000, San Francisco not-for-profits utilized more than 2,000,000 square feet of program and administrative space and spent half a billion dollars annually.
- Of all the not-for profit space, 38% of the square footage was considered protected from market forces through not-for-profit ownership.
- San Francisco not-for-profits were renting or leasing space at far below market rates and paying just $10-13 per square foot annually. This represented an average of 7% of their annual expenditures to occupancy costs. It would have be particularly useful to review the trends in rents/lease rates over time and how they compare with market rates and patterns. However, no follow-up surveys were found through the web scan.
- The study reflected on possible risk through a derived assessment based on lease expiry dates and analysis of rents/lease rates compared to market rates. It determined that 58% of sites rented and leased by not-for-profits were at risk within the next 15 months and that these sites were leased mainly by smaller not-for-profits.

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[6] Poon, Mona (2007). A Handbook for Vancouver Artists Seeking Affordable Studio Space. A Master of Arts Project (University of British Columbia). http://buildingopportunities.org/downloads/bobics.40291.4084722222.24.pdf

[7] Compass Point Not-For-Profit Services (2001). The Market for a San Francisco Not-For-Profit Multi-Tenant Project. Prepared for the Charles and Helen Schwab Foundation. http://www.compasspoint.org/sites/default/files/docs/research/11_marketformultitenantproje.pdf

- The study identified a majority (65%) of the not-for-profits that do not provide direct services were considering leaving San Francisco in the next three years.
- The concentrations of not-for-profits in three San Francisco neighborhoods were noted — Downtown, South of Market, and Mission. Increasing rents and low vacancies were said to be prevalent in these areas.
- Location was found to be a critical component of success for many not-for-profits who needed to be close to their client population or accessible to volunteers or board members.
- In terms of sharing space with other groups, some not-for-profits noted a possible advantage to be the sharing of resources and information on fundraising, business know-how, and government programs. Some were interested in a one-stop-shop for clients. In terms of disadvantages, some feared losing organizational control or identity or loss of productivity.

A 2002 survey, *Survey Results: Facilities Needs of Not-For-Profit Organizations in the Seven-County Denver Metropolitan Area* [8], considered the facility needs of not-for-profits in Denver. The survey found that the barriers to not-for-profits accessing or acquiring appropriate facilities were significant and it cited that the major concerns of surveyed not-for-profits were quantity, cost, quality, and location of space. Other findings of note include:

- The not-for-profit sector has grown dramatically in the previous decade with the vast majority of these organizations noted to be small in size with annual budgets under $250,000;
- Among the survey respondents, 77% were operating at or over space capacity and the vast majority (88%) believe their client population would increase in the next five years, and 60% believed their current facility would not meet their anticipated needs during this period;
- Facility concerns that were most often cited included the quantity, cost, quality, and location of space. 50% of surveyed organizations had looked for new space in the two years previous to the study and more than half of these organizations had not found a suitable space as a result of their search;
- The majority of respondents did not have a facilities plan (64%) or a reserve fund (56%) to address building needs;
- A large percentage of surveyed organizations (70%) were willing to share space with similar not-for-profits. However, most of the surveyed organizations were not sure how to proceed and were looking for leadership in this regard;
- The survey found the level of facilities' sophistication (i.e. knowledge of facilities-related knowledge) varied across the sector and tended to be correlated more closely with the size of the organization rather than subsector; and

[8] Not-For-Profit Finance Fund and Technical Development Corporation (2002). Survey Results: Facilities Needs of Not-For-Profit Organizations in the Seven-County Denver Metropolitan Area. http://www.denversharedspaces.org/_docs/Executive%20Summary%20Facilities%20needs%20of%20nonprofit%20organizations%20in%20Metro%20Denver.pdf

- One of the areas of concern by not-for-profits was related to using debt for facility projects. The researchers attributed this fear to a lack of experience on the part of not-for-profits in using debt for facilities' projects resulting in anxiety towards their ability to repay such debts. Technical assistance to support organizations with such facilities' projects were reported to be lacking.

A 2011 survey by Vancity, *Social Purpose Real Estate Member Survey*[9], targeted member organizations that are involved in not-for-profit or social purpose activity. The survey had 95 respondents and was one of the building blocks that led to the development of this broader survey project by SPRE and Project Funders.

- The majority of survey respondents provided direct services (63%) and the organizations had a range of focus areas – education, children, youth and family, community development, employment and job related, arts and culture, and poverty alleviation.
- Of the respondents, 52% rented their space and 21% owned. The remaining organizations used space that was donated/free of charge, used space that is owned by the City of Vancouver, shared rented space with another organization, or sub-leased from another organization. Almost half of the respondents (46%) reported they would consider buying their next space (again, if relevant) and 41% would consider moving to a shared space.
- Among those who rented their space, the responses were considerably different. Those who reported all-in rent (base rent plus additional occupancy costs), said they spent an average of $2,568 per month compared to those with triple net rent who spent an average of $8,974 on base rent and an additional $4,009 in property taxes, utilities, and maintenance. Average monthly mortgage payments for those that owned their property was $8,522. These results can be compared to those of this project's survey responses.

Lessons and Strategies

Many of the comparable surveys provided recommendations and lessons learned, which are not necessarily strategies to be recommended in this report, but rather were considered during the RENT-LEASE-OWN survey design and can be of interest to the project on a broader scale.

In several of the surveys reviewed, the respondents were asked to reflect on the challenges and opportunities for not-for-profit space needs and to suggest strategies and solutions for how some of the challenges could be overcome. The following section presents some lessons and findings of interest from those surveys as well as other studies as outlined in the reports. These are not necessarily recommendations for Metro Vancouver SP organizations, but were referenced for the preparation of the Metro Vancouver survey design, and are presented here for interest and information.

- Some of the studies suggest that there is a need for both short and long term solutions as not all groups are at the same level of risk. The groups and their space needs and circumstances are so diverse and varied that multiple approaches and strategies will be needed.

[9] Vancity (2011). Social Purpose Real Estate Member Survey.

- Not-for-profits are being forced to think more entrepreneurial and to review their operations with the goal of cost savings and efficiencies. However, not-for-profits often (although not always) lack the expertise to develop, analyze, and implement real estate solutions. They will often need assistance with aspects such as site selection, capital investment plans, due diligence, management approaches, decisions about tenure, maintenance schedules, and other factors.
- Policy-based approaches, such as set-asides for not-for-profits in commercial development projects and creating not-for-profit enterprise zones, were suggested.
- Funders should consider low-interest loan capital and technical assistance on raising funds and purchasing buildings.

In terms of having a successful multi-tenant building, the selection of survey projects reviewed here included some suggestions and considerations. This is not intended to be a comprehensive discussion of multi-tenant strategies or considerations.

- The San Francisco research found that not-for-profits did not find locating in a not-for-profit building "to be more compelling than lower, stable rents as a criterion for occupancy." Cost, location, and quality of space was overwhelmingly more important than opportunities for collaboration or shared services.
- The same study identified two other considerations: i) Some not-for-profits were concerned about co-locating in a building strongly associated with one particular foundation or group and becoming overly identified with that group themselves; and, ii) not-for-profits reported difficulty finding space for board meetings, workshops, and special events.
- For a new multi-tenant building project, it was suggested that the first step should be to identify the goals and mission of the project. For example, the goal could be to provide a resource-rich, collaborative environment or to provide stable, affordable space for a wide mix of organizations. This would provide a framework that would then guide the project.
- It was noted that there are several possible ownership models and relationship configurations for a multi-tenant building or shared space, such as government-owned and leased to not-for-profit, private ownership, not-for-profit ownership, and condominium ownership.
- One report recommended that it is important to set up an organizational structure that banks/financial institutions would lend to. Having board member experience in real estate development, legal expertise, financial management, project management, and not-for-profit management was noted to be an asset for organizations considering the development of a multi-tenant building.
- Several reports noted that shared services was only a secondary benefit of co-location. Such services might include shared human resources, ranging from janitorial services to accounting or legal services, and also jointly-managed volunteer programs or integrated frontline services. It would be important for an organization to undertake a cost-benefit analysis of such shared services.

E. Real Estate Market Overview

The availability, suitability, and affordability of real estate is essential for the program and service delivery of SP organizations. In order to gain a true understanding of how the real estate situation is unfolding for SP organizations, it is important to compare the survey data with the overall real estate context and trends in Metro Vancouver. This will serve as a benchmark to compare the rents and operating costs that SP organizations are currently paying, as well as comparing the availability and suitability of space for SP organizations.

Office Space Overview

The results from the SPRE RENT-LEASE-OWN survey indicated that most SP organizations occupy *office space* for their primary space. There were very few SP organizations that occupy commercial or retail space. As such, it is important for this study to compare the availability (vacancy rate and square footage), as well as the affordability (cost per square foot) of the Metro Vancouver office real estate market in order to provide a baseline comparison to the real estate challenges faced by SP organizations. Most importantly, drawing these comparisons will indicate if the SP sector is paying more, the same, or less than market rate.

With respect to the needs and demand of SP organizations, the availability of inventory is one of the most important driving factors of space needs. Further, the availability of Class types is also important as the more affordable office spaces typically range in the lower end (Class Cs and Bs). To be clear, the differences between these classifications can be defined as follows:

- **Class A Office Space:** Class A buildings will represent the best buildings in the market with the best appearance, quality of construction and finishes, building systems and locations. They will usually command the highest rents.
    - **Class AAA Office Space:** These buildings are essentially Class A office spaces, but includes additional benefits such as a prime location, amenities, access to rapid transit, or being LEED certified.
- **Class B Office Space:** These can be newer buildings in non-prime locations, or older buildings in prime locations. They represent fair quality buildings in their market. They generally have less than quality finishes and are usually of an older structure. Class B buildings are usually not in as prime locations as the Class A or Class B+ buildings.
- **Class C Office Space:** This is the lowest category of office space and is generally the oldest, in need of renovation, with out-dated building systems and in poorer locations. Class C buildings are often potential redevelopment sites.

Over 73% of all office inventory in Metro Vancouver is located within the City of Vancouver municipal boundaries, and the majority of AAA Class office space is located within Downtown Vancouver. There is a significant 6.5 million square feet of vacant office space in Metro Vancouver. Over 2.7 million of that vacant square footage is located within suburban Vancouver (excluding Downtown and the Broadway Corridor). For Metro Vancouver as a whole, the majority of vacant office space is Class B and Class C types.

Table 1.1: Office Supply Inventory (Square Footage) in Metro Vancouver

Concentration of Office Space Inventory in Metro Vancouver [Square Footage]					
	Class C	Class B	Class A	Class AAA	TOTAL Office Inventory by Municipality
Surrey	692,293	1,026,801	1,877,894	-	3,596,988
North Shore	340,027	1,450,714	660,715	-	2,451,456
New Westminster	532,433	651,930	203,075	-	1,387,438
Richmond	333,017	1,801,527	1,931,577	-	4,066,121
Burnaby	582,826	3,322,471	5,529,512	613,479	10,048,288
Vancouver, Broadway Corridor	538,074	2,979,439	2,471,841	158,585	6,147,939
Sub-Urban Vancouver	3,018,670	11,232,882	12,674,614	772,064	27,698,230
Downtown Vancouver	4,967,144	9,412,110	6,736,040	3,293,194	24,408,488
TOTAL Office Inventory by Class Type	11,004,484	31,877,874	32,085,268	4,837,322	79,804,948

Source: Colliers International, Vancouver Office Statistics, Q4, 2012

The City of Richmond is experiencing significantly high vacancy rates of 23.6% for Class B space and 22.2% for Class C space, and, as a result, lower asking prices for all office class types compared to other municipalities. Part of the high vacancy rate is due to major players leaving the community including TransLink and Coast Capital Savings. There is also a redevelopment clause for a number of office buildings along the Canada Line that foster uncertainty amongst tenants. The availability of office space in Richmond could be an opportunity for SP organizations in Metro Vancouver should the location be appropriate for their organization.

Table 1.2: Office Supply Vacancy (Square Footage) in Metro Vancouver

Concentration of Office Space Vacancy in Metro Vancouver [Square Footage]					
	Class C	Class B	Class A	Class AAA	TOTAL Office Inventory by Municipality
Surrey	44,782	143,621	349,804	-	538,207
North Shore	13,878	116,214	35,246	-	165,338
New Westminster	62,522	45,230	6,279	-	114,031
Richmond	73,860	424,611	335,548	-	834,019
Burnaby	29,016	373,589	393,959	37,439	834,003
Vancouver, Broadway Corridor	10,430	102,554	169,655	2,589	285,228
Sub-Urban Vancouver	234,488	1,205,819	1,290,501	40,028	2,770,836
Downtown Vancouver	328,124	390,400	175,097	90,382	984,003
TOTAL Office Inventory by Class Type	797,100	2,802,038	2,756,089	170,438	6,525,665

Source: Colliers International, Vancouver Office Statistics, Q4, 2012

Table 1.3: Office Supply Vacancy Rate (as a percentage) in Metro Vancouver

Concentration of Office Space Vacancy Rates in Metro Vancouver [As a Percentage]					
	Class C	Class B	Class A	Class AAA	AVERAGE Vacancy Rate by Municipality
Surrey	6.5%	14.0%	18.6%	-	13.0%
North Shore	4.1%	8.0%	5.3%	-	5.8%
New Westminster	11.7%	6.9%	3.1%	-	7.2%
Richmond	22.2%	23.6%	17.4%	-	21.1%
Burnaby	5.0%	11.2%	7.1%	6.1%	7.4%

Concentration of Office Space Vacancy Rates in Metro Vancouver [As a Percentage]					
	Class C	Class B	Class A	Class AAA	AVERAGE Vacancy Rate by Municipality
Vancouver, Broadway Corridor	1.9%	3.4%	6.9%	1.6%	3.5%
Sub-Urban Vancouver	7.8%	10.7%	10.2%	5.2%	8.5%
Downtown Vancouver	6.6%	4.1%	2.6%	2.7%	4.0%
AVERAGE Vacancy Rate by Class Type	8.2%	10.2%	8.9%	3.9%	8.8%

Source: Colliers International, Vancouver Office Statistics, Q4, 2012

The City of Richmond has the lowest average asking rental rate at $12.65 per square foot for Class B and $9.13 per square foot for Class C. For Metro Vancouver as a whole, Class C office space ranges from $9.13 per square foot in Richmond (lowest), to $13.57 per square foot in Surrey (about average), and $21.91 per square foot in Vancouver along the Broadway Corridor (highest). Comparatively, for Metro Vancouver as a whole, Class B office space ranges from $12.65 per square foot in Richmond (lowest), to $15.47 per square foot in Burnaby (about average), to $26.64 per square foot in Downtown Vancouver (highest).

Table 1.4: Office Supply Market Rates in Metro Vancouver

Office Supply Market Rates in Metro (Weighted Average Asking Net Rental Rates*. (*note: market rates are measured by dollar per square foot per year [$/SF], where $ = Annual Base Rent, and SF= the area that the organization occupies and uses as defined by rental/lease agreement).					
	Class C	Class B	Class A	Class AAA	AVERAGE Market Rate by Municipality
Surrey	$13.57	$15.38	$22.34	-	$17.10
North Shore	$17.37	$16.77	$23.10	-	$19.08
New Westminster	-	$14.77	$19.75	-	$17.26
Richmond	$9.13	$12.65	$18.43	-	$13.40
Burnaby	$13.51	$15.47	$22.12	$26.00	$19.28

Office Supply Market Rates in Metro (Weighted Average Asking Net Rental Rates*. (*note: market rates are measured by dollar per square foot per year [$/SF], where $ = Annual Base Rent, and SF= the area that the organization occupies and uses as defined by rental/lease agreement).					
	Class C	**Class B**	**Class A**	**Class AAA**	**AVERAGE Market Rate by Municipality**
Vancouver, Broadway Corridor	$21.91	$19.65	$23.65	$24.00	$22.30
Sub-Urban Vancouver	$11.25	$14.92	$21.45	$26.00	$18.41
Downtown Vancouver	$17.04	$24.64	$35.01	$37.68	$28.59
HIGHEST Rate	$21.91	$24.64	$35.01	$37.68	$29.81
LOWEST Rate	$9.13	$12.65	$18.43	$24.00	$16.05
AVERAGE Market Rate by Class Type	$14.83	$16.78	$23.23	$28.42	$19.43

Source: Colliers International, Vancouver Office Statistics, Q4, 2012

The current average asking rental rates are an important baseline statistic for comparing the current cost per square foot paid amongst SP organizations.

Table 1.5: Office Supply Gross Rental Market Rates in Metro Vancouver

Office Supply Market Rates in Metro (Weighted Average Asking GROSS Rental Rates* (*note: market rates are measured by dollar per square foot per year [$/SF], where $ = Annual Gross Rent, and SF= the area that the organization occupies and uses as defined by rental/lease agreement).					
	Class C	**Class B**	**Class A**	**Class AAA**	**AVERAGE Market Rate by Municipality**
Surrey	$20.85	$24.35	$33.10	-	$26.10
North Shore	$27.37	$26.30	$36.16	-	$29.94
New Westminster	-	$26.83	$31.50	-	$29.17
Richmond	$14.45	$20.94	$29.98	-	

Office Supply Market Rates in Metro (Weighted Average Asking GROSS Rental Rates* (*note: market rates are measured by dollar per square foot per year [$/SF], where $ = Annual Gross Rent, and SF= the area that the organization occupies and uses as defined by rental/lease agreement).

	Class C	Class B	Class A	Class AAA	AVERAGE Market Rate by Municipality
Burnaby	$25.32	$26.48	$34.46	$42.69	$32.24
Vancouver, Broadway Corridor	$35.45	$33.13	$39.30	$41.23	$37.28
Sub-Urban Vancouver	$18.27	$24.88	$33.31	$42.69	$29.79
Downtown Vancouver	$30.65	$41.09	$54.65	$54.28	$45.17
HIGHEST Rate	$35.45	$41.09	$54.65	$54.28	$46.37
LOWEST Rate	$14.45	$20.94	$29.98	$41.23	$26.65
AVERAGE Market Rate by Class Type	$24.62	$28.00	$36.56	$45.22	$31.43

Source: Colliers International, Vancouver Office Statistics, Q4, 2012

Market Potential

Richmond and Surrey have the highest office space vacancy rates in Metro Vancouver, at 21% and 13% respectively. The high vacancy is a major driver of the lower than average asking net rental rates for office space in these municipalities.

The overall higher availability of space inventory, and below average rents, in Richmond and Surrey could act as a magnet to SP organizations seeking affordable and available space. Both these municipalities have access to rapid transit, too, which is highly desireable amongst some SP organizations.

Office space located within sub-urban areas of the City of Vancouver is more attainable than office space located in the Downtown or along the Broadway Corridor. For those SP organizations who need to be located within the municipal boundaries of the City of Vancouver, sub-urban office space provides a more affordable option that other parts of the City (on average).

F. Policy and Regulatory Scan

Metro Vancouver municipalities have introduced plans and policies that foster and support the not-for-profit sector in a variety of real estate, financial, and non-financial means. This section of the report briefly describes this policy context to provide a backdrop for the survey results. While not intended to be a comprehensive scan, the following section presents a sample of policies, regulations and approaches that exemplify what types of supportive initiatives municipalities in the region have implemented. These practices highlight just some of the ways that municipalities in this region have chosen to support not-for-profit organizations and other social purpose groups.

Visioning & Strategic Planning for Not-for-Profits

Many municipalities have developed plans and visions that illustrate how they intend to support the not-for-profit sector. Typically, these plans and vision documents are part of a broad social or cultural plan for the municipality as a whole. They often present a set of goals or directions towards a segment of the not-for-profit sector, such as child care providers or arts and cultural groups. Alongside the vision or plan, a framework for implementation is provided. This facilitates the development of detailed policies and regulations, which can then be further investigated and potentially implemented to support these groups. Few social or cultural plans specifically address the space needs of the not-for-profit sector, although municipalities may offer other types of financial support such as reduced rental rates of civic facilities for not-for-profit use, funding support through community grants, and waiving of certain fees for new developments.

Despite the lack of direct financial support in many plans and visions, such documents provide a framework and guide by which other policy and regulatory decisions can be made at a future date, including decisions to support the space needs or development opportunities for the not-for-profit or social purpose sector.

- The City of Vancouver's Cultural Facilities Priorities Plan (2008) is one example of this type of roadmap, outlining actions and strategies to improve opportunities for cultural space development, operation, and maintenance. To develop this Plan, the City worked with the cultural community to articulate key needs for a variety of cultural spaces, and it outlined a number of strategies for improving cultural space activities and the environment for the creation and operation of cultural spaces through capacity building, resources, and partnerships [10].

Zoning & Other Regulations

Zoning and development bylaws define and regulate the types of uses that are permitted in different zoning districts. The availability of office, recreation or other program space for not-for-profit groups can be facilitated through specific zoning and other regulations, such as allowing certain uses in residential neighbourhoods.

[10] The City of Vancouver's Cultural Facilities Priorities Plan can be found at http://vancouver.ca/files/cov/CulturePlan-Phase1-Facilities-Study.pdf

- The District of West Vancouver has chosen not to enforce the zoning bylaw for three District-owned properties in Ambleside to support the District's policy to encourage art, culture, and other public uses along that section of the waterfront. This was seen to add vibrancy to the area, even though those uses were not consistent with the current RT1 zoning for those properties (a two family residential zone). The District decided to not enforce certain aspects of the Zoning Bylaw for those properties for a set period of five years (from 2010) or until the zoning bylaw is amended[11].
- The City of Vancouver allows a variety of social, cultural, or recreational uses in residential districts on a conditional basis[12]. For example, in Mount Pleasant, the RM-4, RT-5, and RT-6 residential zones conditionally permit "Cultural and Recreational" uses. In RT-6 and RM-4 districts, for example, clubs are allowed provided that no commercial activities are carried on and the use does not adversely impact residential uses. The Mount Pleasant Neighbourhood House is located in an RT-5 zone and two Boys and Girls clubs are located in residential zones. The residential zones in Mount Pleasant are just one example of allowing cultural and social uses as conditional uses, regulated by the Zoning and Development Bylaw, which defines and regulates where these uses can go by zoning district [13].

Use of Public Facilities

One of the most common ways of supporting not-for-profits is by making public facilities such as community centres, schools and other civic facilities available for rent by groups at reduced rental rates. This can support those groups to undertake their program activities at below market rates and without necessarily needing to have their own space. Both the City of Richmond and the City of Vancouver, among others, offer reduced rates for not-for-profit community groups. Vancouver's policy includes school facilities, which are available for community and commercial use.

Amenity Zoning or Density Bonus Policies

Another example of a policy or practice that supports not-for-profits is through the use of the density bonusing tool. As part of major projects that involve rezonings, many municipalities require or negotiate a community benefit contribution in return for the increase in land value that the developer gains from the rezoning. Community amenities may include public art, community centres, parks, or other facilities that benefit a neighbourhood[14]. Affordable housing or housing that is managed by a not-for-profit housing provider is increasingly considered to be a community amenity by local municipalities. When spaces are made available through a major rezoning for childcare, social facility, arts and culture, or other not-for-profit purposes, these facilities are then leased to not-for-profit operators at below-market or nominal rents.

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[11] District of West Vancouver Official Community Plan can be found at http://westvancouver.ca/Level2.aspx?id=1232

[12] Additional information on the City of Vancouver Zoning Districts, Maps and Regulations can be found at http://vancouver.ca/home-property-development/zoning-districts-maps-and-regulations.aspx

[13] City of Vancouver Zoning & Development Bylaw No. 3575 can be found at http://vancouver.ca/your-government/zoning-development-bylaw.aspx

[14] Additional information on the City of Vancouver Community Amenity Contribution Policy can be found at https://vancouver.ca/home-property-development/community-amenity-contributions.aspx

- The City of Burnaby secures developer contributions through the Community Benefit Bonus Policy and the rezoning process for major developments. The contributions may include not-for-profit office spaces that are then leased or otherwise allocated to community not-for-profit groups. Cash contributions can be allocated to the City's Housing Fund to be used toward City-initiated or community-sponsored affordable housing projects [15]. Generally, these funds are used to off-set City-related costs such as application and permit fees, development cost charges, and off-site servicing requirements.
- In the City of Richmond, developer cash contributions and child care density bonus contributions from major project rezonings are allocated to the City's Child Care Reserve Funds with 90% of the amount deposited to a development reserve fund and 10% deposited to an operating fund, which provides financial assistance with non-capital expenses related to childcare within the City. These funds assist with establishing childcare facilities and spaces in private developments or on public lands and acquiring sites for lease.
- The City of Vancouver approves additional density through rezonings that can result in large net increases in floor area. This bonus density is approved in exchange for public benefits.[16] Using 2011 as an example, there were 36 approvals of additional density in that year that resulted in a net increase in floor area of 4.2 million square feet. The 2011 approvals secured approximately $180 million in public benefit commitments, of which affordable housing made up 31% and community facilities 28%.

Property Tax Exemptions

Another practice for assisting not-for-profits is providing ongoing property tax exemptions for those that own their properties. The Community Charter enables municipalities to offer such tax exemptions to selected groups including not-for-profit organizations. Municipalities choose to offer tax exemptions in a variety of approaches.

- The City of Coquitlam grants property tax exemptions to support local organizations that enhance the wellbeing of the community. Exemptions are considered for a period of up to five years for certain types of land or improvements that are permitted by legislation and which are understood to provide some general benefit to residents of Coquitlam.
- The City of Richmond grants permissive property tax exemptions for churches, private schools, hospitals, and charities. Charitable property tax exemption is allowed for properties where a not-for-profit organization is using a municipal building as a licensee or tenant of the municipality.

[15] City of Burnaby Community Benefit Policy can be found at http://www.burnaby.ca/Assets/city+services/planning/Community+Benefit+Bonus+Policy.pdf

[16] For more information on the City's Community Amenity Contribution policy, see: https://vancouver.ca/home-property-development/community-amenity-contributions.aspx

Municipal Grant Programs

Usually created and managed by municipal staff, some municipalities offer grant programs to not-for-profit organizations. Such municipal funding may sometimes be allocated or awarded to an independent not-for-profit organization in the community to adjudicate and disburse the funds to local groups. There are a range of examples of funding programs. Some municipalities provide annual operating grants or organizational development and training funds, while others provide project funding for nonprofit groups or arts and cultural groups.

- The City of North Vancouver provides annual grants to not-for-profit agencies which deliver a range of community social and cultural services to City residents. Specifically, grants are provided for community services, outreach youth services, arts assistance, children and youth initiatives, and core funding. The designation for core funding may be granted to an agency by Council for general operating expenses and/or specific services.
- The City of Coquitlam provides annual grants to not-for-profit and community-based organizations to help fulfill the City's strategic goals. The grant programs include an active grant category ($5,000) for sport and active recreation services for children and youth, and the Spirit of Coquitlam grant, which focuses on assisting community organizations to work collaboratively and to combine their efforts and resources.
- The City of Port Coquitlam's Self-Help Matching Grant Program supports projects that involve new construction, renovation or expansion of community facilities or spaces such as sports fields, parks, environmental habitat, community recreation, indoor sports area, arts/culture, streetscapes, etc.
- The City of Richmond's grant program assists Richmond-based community groups to provide programs to residents, to build community and organizational capacity to deliver programs, and to promote partnerships and financial cost sharing. Groups can receive funding in the program areas: health, social and safety; parks, recreation, and community events; and arts and culture.
- The City of Vancouver Social Grants program[17] provides capital and operational grants (more than $6 million annually) to local community-based organizations addressing social problems and bringing about positive social change. Some of the areas supported include: childcare; neighbourhood-based capacity building; food security; rent subsidies; and, social services to specific demographic groups such as new immigrants, seniors, urban Aboriginals, women, youth, and people with disabilities. The City also manages a Cultural Grants Program, which supports a range of artistic and cultural activity such as literary, visual, media, dance, theatre, music, and other activities. The Program provides grants to support ongoing operating assistance as well as one-time or time-limited initiatives. This may include arts and cultural facilities, theatre rental assistance, arts and cultural conferences, as well as other areas[18].

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[17] Additional information on the City of Vancouver Social and Sporting-Event Grants program can be found at https://vancouver.ca/people-programs/social-and-sporting-event-grants.aspx

[18] Additional information on the City of Vancouver Arts and Culture Grants can be found at https://vancouver.ca/people-programs/arts-and-culture-grants.aspx

Disposition of City Properties

Few municipalities have a written policy on the selling and leasing of municipal properties to not-for-profit organizations. However, there are a number of examples of municipalities leasing city properties to not-for-profits at below-market or nominal rents. This is one of the most direct methods for assisting not-for-profits with their real estate and space needs. The Consultants are not aware of any examples of sales to not-for-profit organizations at below-market values.

- The City of Burnaby owns two buildings that serve as community resource centres. These centres are leased to not-for-profit groups which provide services and programs that are primarily intended for Burnaby residents. Through a lease grant program, agencies are eligible for significant reductions in rent. The City leased Burnaby Heights School as a resource centre between 1990 and 2009.
- The City of Delta leases municipal properties at nominal rent to not-for-profit groups.
- The City of North Vancouver has a policy in place to lease community facilities to not-for-profit organizations at one dollar annual rent.
- The District of North Vancouver leases community facilities on an ongoing basis to societies or groups that provide social, cultural, educational, and recreational benefits. Community facility leases have a maximum term of five years at a fee of $1.00 per annum.
- The City of Richmond has planned and developed City-owned child care facilities for lease at nominal rates to not-for-profit providers.
- The City of Vancouver owns and manages properties, buildings, land, and lots around the City. The City leases and sub-leases City-owned buildings or spaces to artists and not-for-profits, including social, childcare, and arts and cultural organizations on a long-term basis for nominal rent or for market rent. This includes industrial, commercial/office, warehouse, and retail spaces.

G. Survey design

Based on reviewing a number of comparable surveys, policy and regulatory scan, and high-level real estate market overview, the following topic areas were considered for the SPRE RENT-LEASE-OWN survey (the full list of survey questions can be found in Appendix B: Survey Questions).

Organizational Profile

The purpose of this topic area was to understand what type/category the SP organization is, including how they self-identify with respect to their primary activity, as well as their staffing levels (employment and volunteer base). Generally, it was critical for this study to have a good understanding of the types of organizations who responded to the survey, not only to provide a richer understanding of the data, but to also identify the extent to which the respondents represent the sector as a whole.

With respect to the RENT-LEASE-OWN survey design, information collected for this topic area comprised of contact information, distinguishing between not-for-profit and for-profit, identifying primary activity, and staff composition.

Location and Space Needs

The purpose of this topic area was to understand if SP organizations are secure in their current space and / or location, or if real estate, space, funding, or other challenges are pressuring them to leave their current location, and why.

Information collected for this topic area comprised of site locations (including multiple sites per organization, where applicable), current space size (square footage), additional space needed (square footage), and building components / features needed in order to be effective in program and service delivery.

Space typology was also obtained from the survey participants in order to understand space suitability. Typology classifications included retail, office, commercial, institutional, community facilities, light and heavy industrial, and residential/home-based. In addition, a number of SP organizations virtually “couch-surf” temporarily available space, or may work on the street (such as an artist painting or carving outside); for these organizations, “do not have dedicated space” was an option.

Shared space and co-location potential was a major focus for this study. It was important to understand what the real level of interest in shared space is within Metro Vancouver, and what building aspects are most valued by SP organizations, and to what degree of interest. Questions were designed to grasp the extent to which not-for-profits consider tenant mix for shared space, as well as how important tenant mix is relative to building characteristics or lease/rental arrangements.

Specific location data of organizations (including postal code data for mapping purposes) were recorded. This was an important consideration in the survey design as location affects a multitude of issues including accessibility for staff, proximity to clients, compatibility of clients with neighbours, and proximity to businesses, services, amenities, and other not-for-profits.

Further, it was useful to identify where organizations are located by municipality, and by neighbourhood for the City of Vancouver (where the greater concentration of respondents were located). It was also useful to analyze the importance of location in a specific neighbourhood or municipality in order to understand SP organizations' primary activity/mission, and to see if there was any relevance to understanding the level of risk to an organization facing possible displacement with respect to their location.

For organizations considering a future move, a checklist of where they would move next was provided in the survey design, including either (i) buying own space; (ii) co-locating; (iii) moving outside current municipality; or, (iv) moving outside Metro Vancouver.

Tenure and Stability

The survey design considered the level and assessment of risk for the not-for-profit and social purpose sector displacement, including the immediacy of current lease/rental term expiration, confidence level in the ability to renew current space agreements, percentage of operating budget directed to occupancy/space costs, as well as discrepancy between current costs and competitive market rates.

To illustrate, a not-for-profit with a lease that expires next year — and whose building owner is preparing the building for sale — is at relatively higher risk than a not-for-profit with the same expiration date but whose owner has indicated a receptiveness to renewal.

Information collected from this topic area included tenure status (rent, lease, sub-lease, donated/subsidized space, and own) as well as lease/rental agreement expiration timeframes, lease/rental agreement restrictions, redevelopment potential, and perceived and known security/stability of space. This section of the survey also explored SP organizations' consideration of re-locating as a consequent of instability, with questions pertaining to reasons for moving, and amenities considered in a move.

Affordability

Understanding the real estate costs of SP organizations was essential to the SPRE RENT-LEASE-OWN study, especially in order to compare with current market rate costs as illustrated in Section D: Real Estate Market Overview.

Data collected under affordability included monthly costs (either total or breakdown of rent/mortgage, utilities, maintenance, taxes, and facility reserve fund), total cost of base rent per square foot, and maximum monthly cost per square foot that an organization would be willing to spend on space-related costs. The survey design also incorporated questions relating to the percentage of the SP organizations' annual expenses/operating costs that goes towards their lease, rent, mortgage, and other building expenditures such as property taxes and utilities.

H. Survey Implementation

SPRE Survey Audience and Response

At the initial stages of the study, there was no official list or database of organizations for the SP sector. As such, a list was prepared by amalgamating seven (7) pre-existing databases, including:

- 2011 & 2012 Vancity All Grant Applicant Contacts;
- Vancity Enterprising Non-Profits Program List (newsletter);
- Vancity Grantees List (2003 to Present);
- City of Vancouver Arts Organization Contact List;
- SPRE 2010 Conference Registration List;
- SPRE Conference Email List; and,
- Vancity Community Foundation - Vancouver Grantee Contact List.

The resulting target audience master list of 1,179 SP organizations was prepared, but was limited to predominately SP organizations located within the City of Vancouver as opposed to a balanced collection of SP organizations from Metro Vancouver. In addition, the master list did not pre-identify the primary activity of each organization (i.e. advocacy or community/social service), so it was unclear if there were some groups more represented than others on the master list. As such, it would not be until the respondents self-identified their primary activity through the SPRE RENT-LEASE-OWN survey to know who the audience of the survey would be.

A “save-the-date” survey notification was distributed to the SP organizations master list. In addition, a widespread notification was conducted through social media, print media, project websites, and word-of-mouth to attract other SP organizations that may not have been included on the master list.

In order to test the validity of the survey format and question design, the survey was distributed to 9 SP organizations to be tested. The survey pre-test was an opportunity to conduct the survey on a trial basis and edited / re-phrased based on any questions that may have been unclear to the pre-test respondents.

Following the pre-test, the survey was launched on October 23rd, 2012 and directly emailed to the 1,179 SP organizations. In addition, an open-link web access to the survey was made available on the SPRE website. Every week for the following 3 weeks, a reminder email was prompted to those recipients who had yet to respond/submit the survey. On the last week prior to the deadline, follow-up phone calls were conducted for those recipients who had yet to complete the survey. The survey deadline was November 18th, 2012, providing participants a total of 27 days to complete the survey.

I. Survey Results

It was originally hoped that the survey would yield a response of approximately 300 surveys, or about 25%. The feedback on the SPRE RENT-LEASE-OWN survey from the SP sector was very positive, with an incredible response of 592 counted surveys, 407 of which were completed in-full. The first notable observations from the survey response concluded that:

- Over 86% of respondents were located within the City of Vancouver; and
- Over 66% of respondents self-identified as Arts and Culture as their primary activity. Nearly 17% identified as Community or Social Service, and the remainder (advocacy, employment and training, health services, housing, recreation and sport, other) comprised of the other 16%.

Although one of the objectives of this study was to gain an understanding of the real estate situation for SP organizations located across Metro Vancouver, the overwhelming majority of respondents were located within the City of Vancouver and there were not enough survey respondents located elsewhere to make accurate comparisons. As such, the **summary of survey results outlines only those respondents located within the City of Vancouver and are not representative of Metro Vancouver as a whole; all other respondents were excluded from the reported aggregated data** (although, still available in raw data for reference).

In addition, preliminary analysis of the respondents' primary activities (self-identified by respondents) revealed an unbalanced representation of the SP sector as a collection of (i) advocacy; (ii) arts and culture; (iii) childcare; (iv) community or social service; (v) employment and training; (vi) health services; (vii) housing; (viii) recreation and sport; or (ix) other. Generally, there were not enough respondents under several primary activities for each to be reported equally.

Further, there was a overwhelming representaion of Independant Artists under the Arts and Culture primary activity category – a group which tend to have very unique space needs compared to the Arts and Culture sector and other SP organizations as a whole. As such, a special set of criteria was implemented to extract Independent Artists from the data for the purpose of reporting them separately (respondent identified as Arts and Culture as their primary activity and employed one or zero persons).

As a result, the data was organized into four (4) categories for reporting purposes:

1. **Community and Social Service Organizations** (100 surveys);
2. **Independent Artists** (191 surveys);
3. **Arts and Culture Organizations** (which excludes independent artists) (205 surveys); and,
4. **All Other SP Organizations** (96 surveys) (a catch-all grouping consisting of advocacy, employment and training, health services, housing, recreation and sport, and other categories).

With respect to the respondents being representative of the sector as a whole, the study is approximately 1/3rd Independent Artists (mostly "for-profit" entities), and the remainder being the "typical" not-for-profit organizations. The respondents are only representative of those located within the City of Vancouver.

The survey yielded a total of 2,186 pages worth of cross-tabulation data as well as over 50,000 words from open-ended questions. The response data was used to assess those questions identified in the initial scope of work. However, the sheer quantity of response data will likely make available insights not originally considered as part of this study, and, as such, the raw data has been organized to facilitate further analysis in the future. Basic summary tables of the survey questions can be found in Appendix C: Survey Summary Tables.

Key Findings from Core Group of Respondents: Community and Social Service Organizations, Arts and Culture Organizations, and Other SP Organizations

NOT-FOR-PROFIT VERSUS FOR-PROFIT STATUS

Highlights from responses to *Q2: Is your organization not-for-profit or for-profit?*

- 73% of Community and Social Service organizations are registered not-for-profits, and 63% are also registered charities.
- 63% of Arts and Culture organizations are registered not-for-profits, 33 % are also registered charities, and 22% are for-profit entities.
- 71% of Other SP organizations are registered not-for-profits, 52% are registered charities, and 14% are for-profit social enterprises.



Both not-for-profit and for-profit entities need to generate revenue in order to sustain their organization.

A registered not-for-profit is entitled to acquire property and borrow money, with profit required to be retained within the organization.



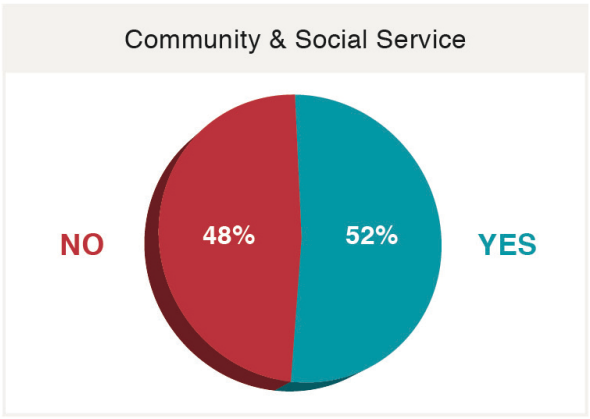


Generally, Community and Social Service organizations and Other SP organizations identified mostly as registered not-for-profit or registered charity.

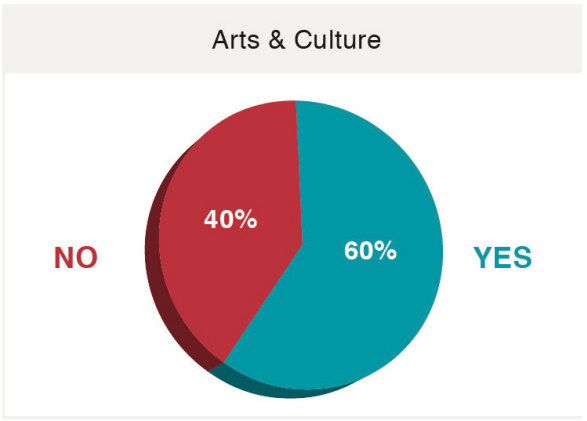
SHARING SPACE STATUS

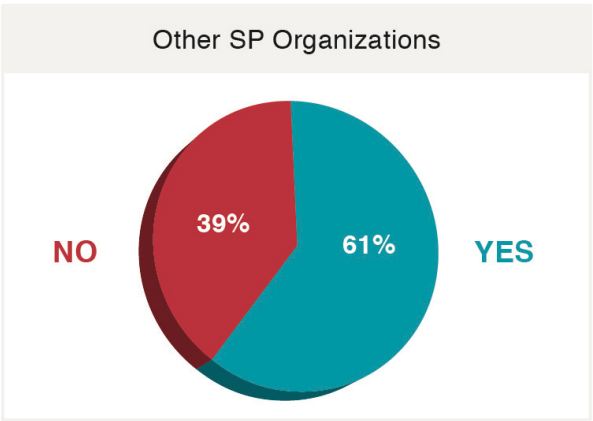
Highlights from responses to *Q6: Do you currently share space with another organization?*

- 52% of Community and Social Service organizations currently share space.
- 60% of Arts and Culture organizations currently share space.
- 61% of Other SP organizations currently share space.



Over half of the survey respondents already share space with another organization.





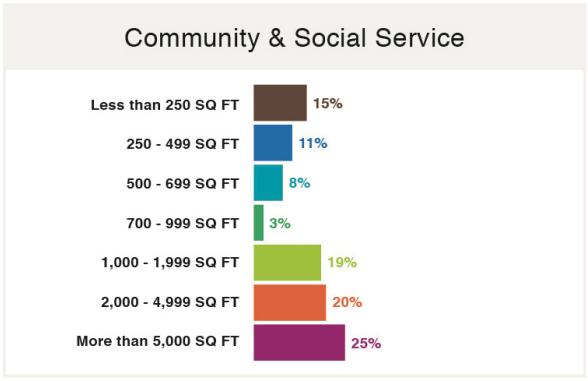
The sharing space status was a major finding from the survey results. Nearly half of all SP organizations are willing to co-locate and share services with other organizations, especially SP organizations located in Gastown, Downtown Eastside, and Grandview-Woodland neighbourhoods. Some of these SP organizations indicated that they cluster in order to better serve populations of the same neighbourhood.

Over half of Community and Social Service organizations share space and/or are co-located with other organizations, and over 1/3rd of Arts and Culture and other SP Organizations currently co-locate. This indicates that there is pre-existing culture, awareness or positive attitude towards sharing space and services among SP organizations.

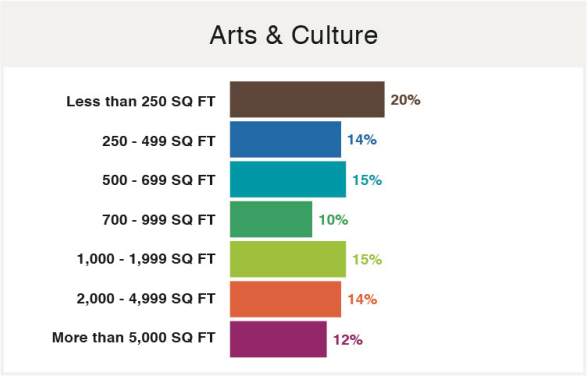
CURRENT SPACE SIZE

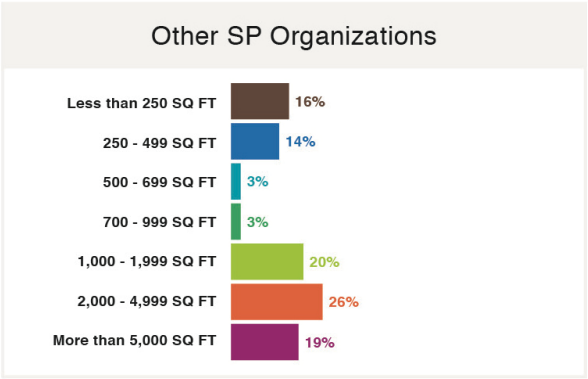
Highlights from responses to *Q7: What is the approximate size in total square footage of your organization's primary space?*

- The majority of SP organizations operate from one site, and typically occupy small unit spaces ranging from less than 250 square feet to 5,000 square feet. The results from Q6 indicates that a large number of SP organizations already share space with another organization.
- Community and Social Service organizations typically occupy more space compared to Arts and Cultural organizations.
- 37% of Community and Social Service organizations occupy less than 1,000 square feet.
- 59% of Arts and Culture organizations occupy less than 1,000 square feet.
- 36% of other SP organizations occupy less than 1,000 square feet.



Space sizes vary amongst survey respondents.





SPACE TYPOLOGY

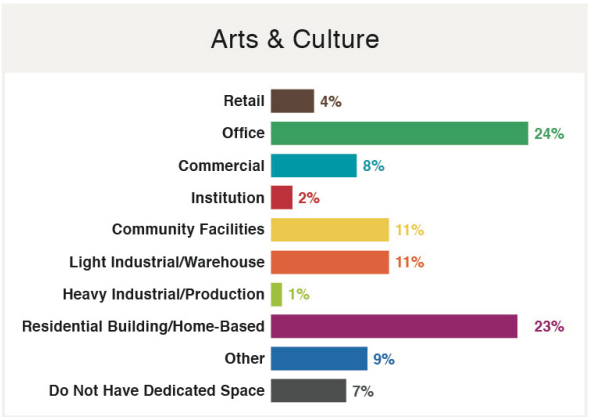
Highlights from responses to *Q9: Which of the following best describes the space that you are currently operating out of (your primary space)?*

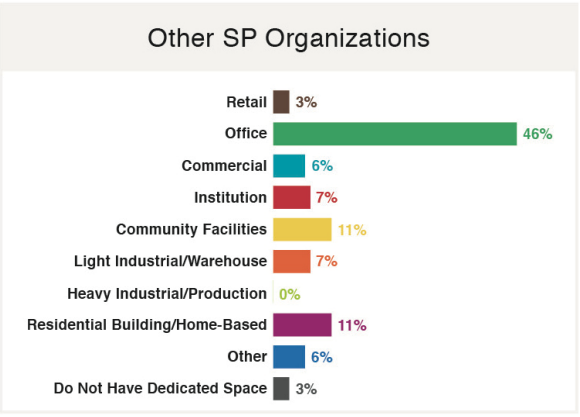
- The top 3 space typologies amongst respondents are: (i) office space; (ii) community facilities; and, (iii) residential building / home-based.
- Community and Social Service organizations primarily occupy office space (32%), community facilities (23%), or residential buildings/home-based (15%).

- Arts and Culture organizations primarily occupy office space (24%), residential buildings/ home-based; (23%), community facilities (11%), or light industrial/warehouse space (11%).
- Other SP organizations primarily occupy office space (46%), community facilities (11%), or residential building/home-based (11%).
- Space typologies that are uncommonly utilized by SP organizations within the City of Vancouver are institutional spaces, retail, and heavy industrial / production spaces. Based on the survey results, retail and commercial space is not a typical space typology amongst SP organizations within the City of Vancouver. Further, SP organizations indicated (via open-ended responses) that office space is their typology of choice; they either want more of it, or move from their current non-office space to office space.



Office space is the predominant space typology, and most preferred space typology, amongst survey respondents.



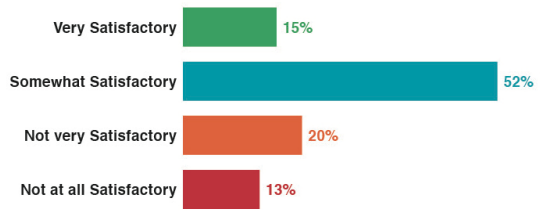


SPACE SATISFACTION

Highlights from responses to *Q10: Does this space meet your organizational needs?*

- Community and Social Service organizations are mostly somewhat satisfied with their space (52%), or very satisfied with their space (15%).
- Arts and Culture organizations are mostly somewhat satisfied with their space (44%) or very satisfied with their space (18%).
- Other SP organizations are mostly satisfied with their space (41%) or very satisfied with their space (36%).

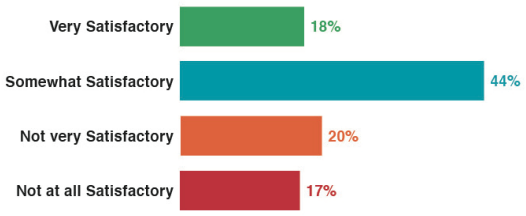
Community & Social Service



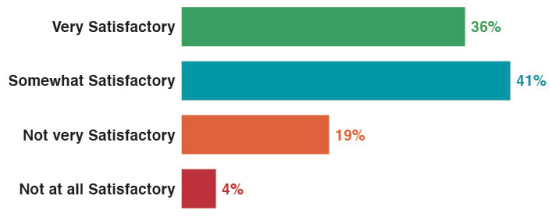
Most survey respondents are at least somewhat satisified with their current space.

Arts and Culture organizations have the highest porportion of respondents who are not at all satisfied with their space.

Arts & Culture



Other SP Organizations

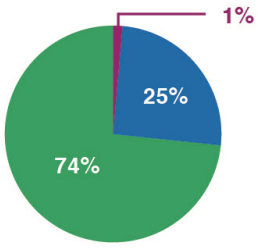


SPACE NEEDS

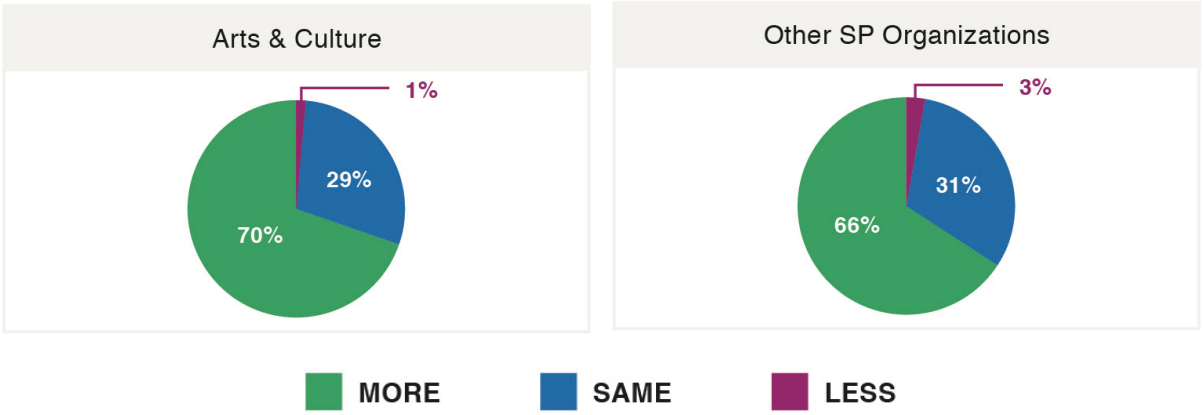
Highlights from responses to *Q11: Within the next 5 years, what space requirements do you estimate your group will need?*

- 73% of Community and Social Service organizations, 70% of Arts and Culture organizations, and 66% of other SP organizations will require more space within the next 5 years.

Community & Social Service

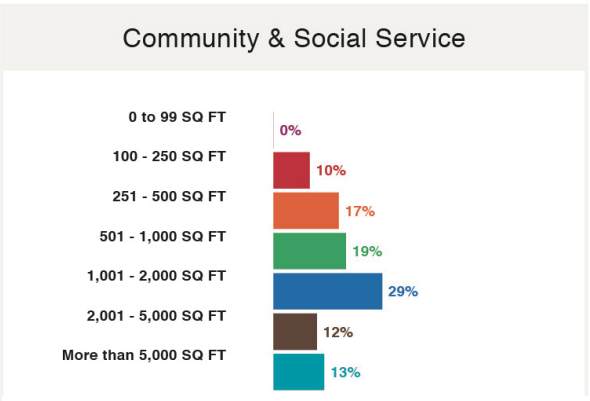


The majority of survey respondents require more space within the next five years.

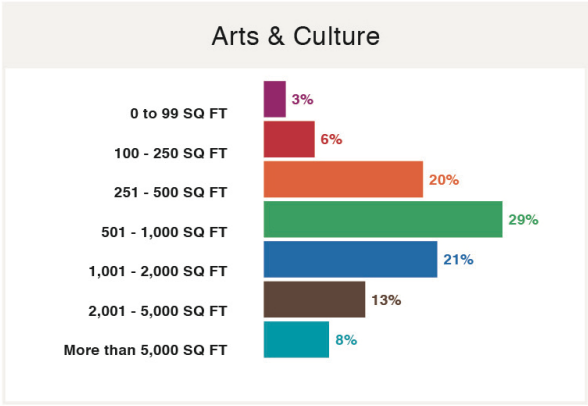


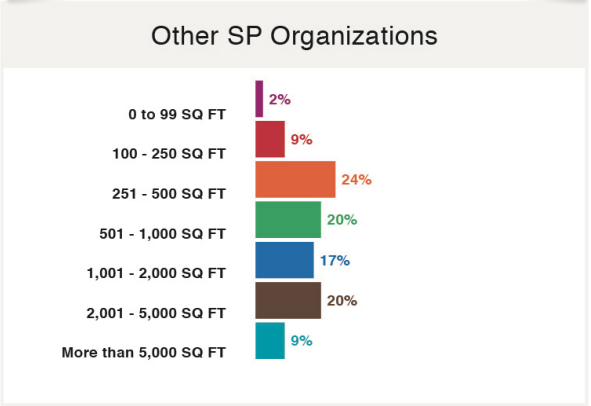
Highlights from responses to *Q12: How much additional space would you require to meet your organizational needs?*

- 46% of Community and Social Service organizations require less than 1,000 square of additional space. 58% of Arts and Culture organizations require less than 1,000 square feet. 55% of other SP organizations require less than 1,000 square feet of additional space.
- 13% of Community and Social Service organizations are looking for more than 5,000 square feet. Only 8% of Arts and Culture organizations are looking for more than 5,000 square feet. 20% of other SP organizations require more than 5,000 square feet of additional space.



The majority of survey respondents require more space, but not a large amount. Most respondents are looking for less than 1,000 square feet to meet their space needs.

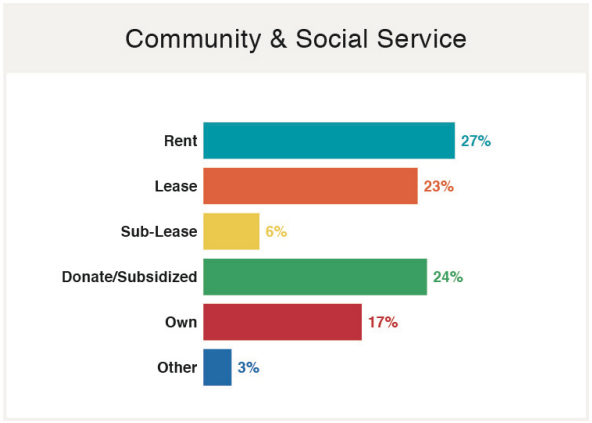




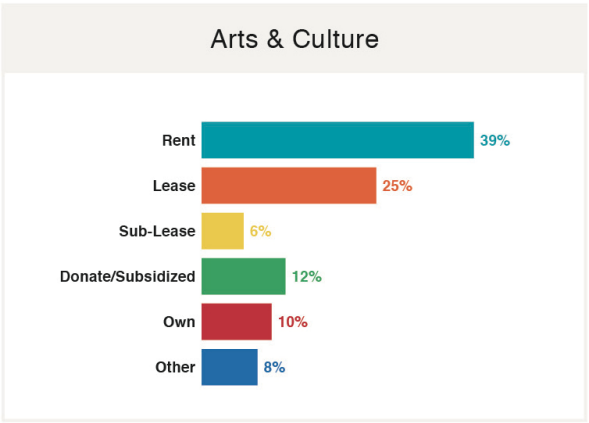
TENURE

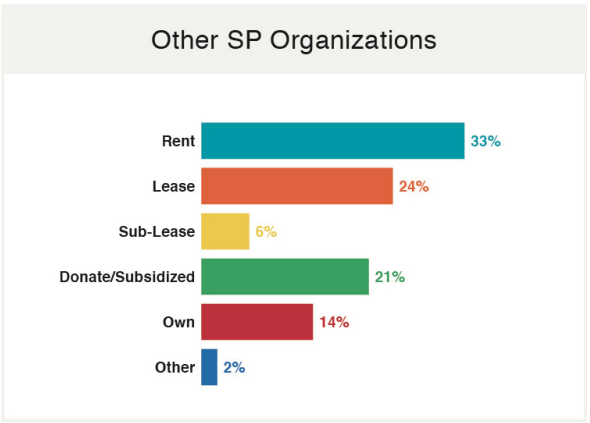
Highlights from responses to *Q14: Do you own, rent, or lease your primary space/headquarters?*

- Community and Social organizations occupy a range of tenure types with 27% renting, 24% occupying donated/subsidized space; 23% lease, and 17% own their space.
- Arts and Culture organizations are mostly renters (39%), or leasers (25%). 12% of Arts and Culture organizations occupy donated/subsidized space, and 10% own their space.
- Other SP organizations consists of 33% who rent, 24% lease, 21% occupy donated/subsidized space, and 14% own their space.
- Most SP organizations are renters or leasers on short-term agreements, with a higher proportion of Community and Social Service and Other SP organizations occupying donated/subsidized space. Generally, ownership exists amongst SP organizations, but only to a small degree.



Most survey respondents are renting their space.





LEASE/RENTAL AGREEMENTS

Highlights from responses to *Q15a: If you rent or lease, when does your lease/rental agreement expire for your primary space?*

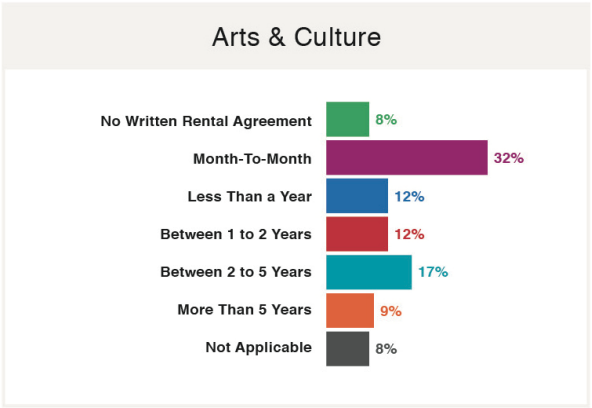
- The overwhelming majority of respondents indicated that they require more space within the next 5 years. Those SP organizations who indicated they need more space do not need very much, most require less than 500 square feet or less than 1,000 square feet.

SP organizations identified meeting rooms and flex space or multi-purpose rooms as important space components that they currently do not have access to but are important for their effectiveness in program and service delivery.

- Arts and Culture organizations range from very small spaces to large spaces, indicating the range of space typologies and programs affiliated with these groups (production space, studio space, rehearsal space, etc.).
- 21% of Community and Social Service organizations and other SP Organizations are on a month-to-month lease/rental agreement.
- 32% of Arts and Culture organizations are on a month-to-month lease/rental agreement, and 8% do not have a written agreement at all.
- Over 1/3rd (34%) of Community and Social Service organizations have a lease/rental agreement between two and five years.



Organizations with tenure agreements less than a year are more vulnerable to the real estate market. The high proportion of month-to-month agreements suggest insecurity and instability occurs in this sector.





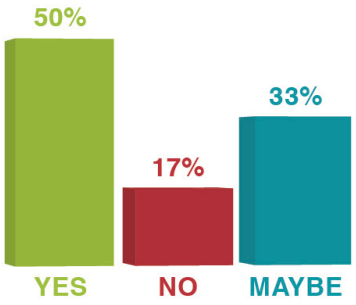
REDEVELOPMENT POTENTIAL

Highlights from responses to *Q16: If you own, would you consider or have you considered redeveloping any of your sites to better meet your needs?*

- Over half of respondents who own would consider redeveloping their site to better meet their needs.

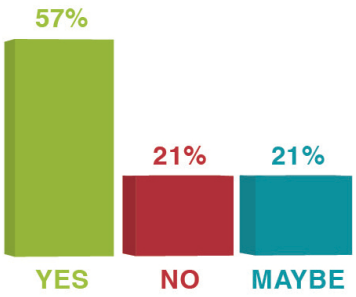
- 50% of Community and Social Service organizations would consider redevelopment, 33% would maybe, and 17% said no.
- 57% of Arts and Culture organizations would redevelop their site, 21% indicated maybe, and 21% indicated that they would not.
- 56% of other SP Organizations would consider redeveloping their site, 33% indicated maybe, and 11% indicated they would not.

Community & Social Service

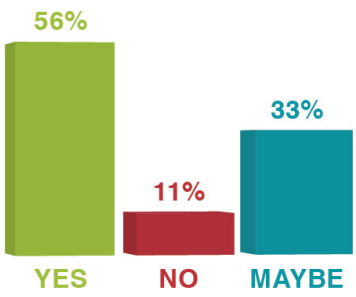


There is a strong willingness amongst owners to redevelop their sites to better suit their needs, and potentially collaborate with others organizations interested in co-location projects.

Arts & Culture



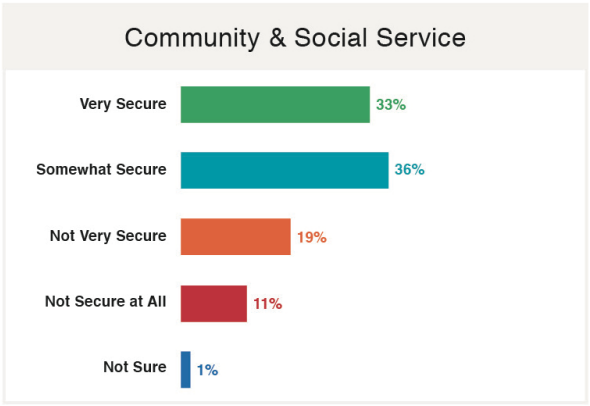
Other SP Organizations



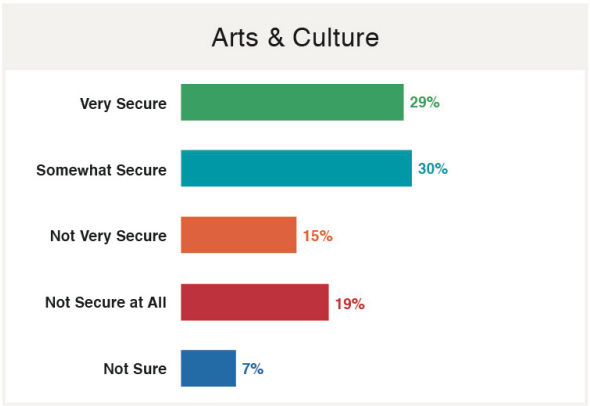
TENURE SECURITY

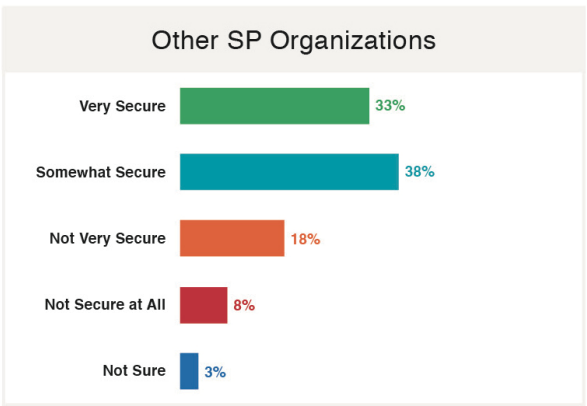
Highlights from responses to *Q17: In your opinion, how secure/stable is your space for the next 5 years?*

- 19% of Community and Social Service organizations indicate that they are not very secure, and 11% indicated that they are not secure at all.
- 15% of Arts and Culture organizations indicate they are not very secure, and 19% indicate they are not secure at all.
- 18% of other SP organizations indicate that they are not very secure, and 8% indicate they are not secure at all.



Nearly 1/3rd of survey respondents indicate that they are insecure with their tenure and have less confidence in their ability to renew their lease or maintain their space.



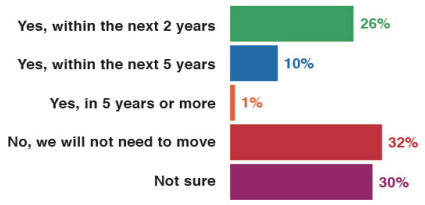


NEED TO MOVE

Highlights from responses to *Q19: Will your organization need to move in the coming years?*

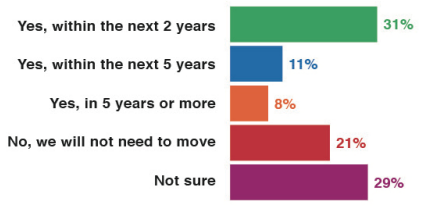
- 26% of Community and Social Service organizations will need to move within the next two years. Nearly 1/3rd of Community and Social Service organizations (32%) indicated that they will not need to move.
- 21% of other SP organizations will need to move within the next two years, and an additional 12% will need to move within the next five years.
- Consistently across the board, 1/3rd of respondents are not looking to move; 1/3rd are looking to move within two to five years, and another 1/3rd are unsure if they will need to move or not.

Community & Social Service

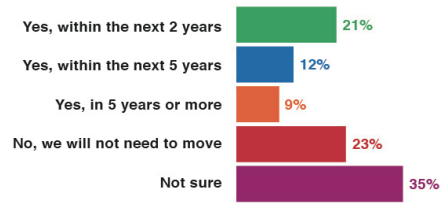


The high response to "not being sure" if an organization will need to move or not suggests there is a high amount of uncertainty with respect to organizational strategic planning, or the inability to plan due to uncertainty of funding, lease agreements, etc.

Arts & Culture



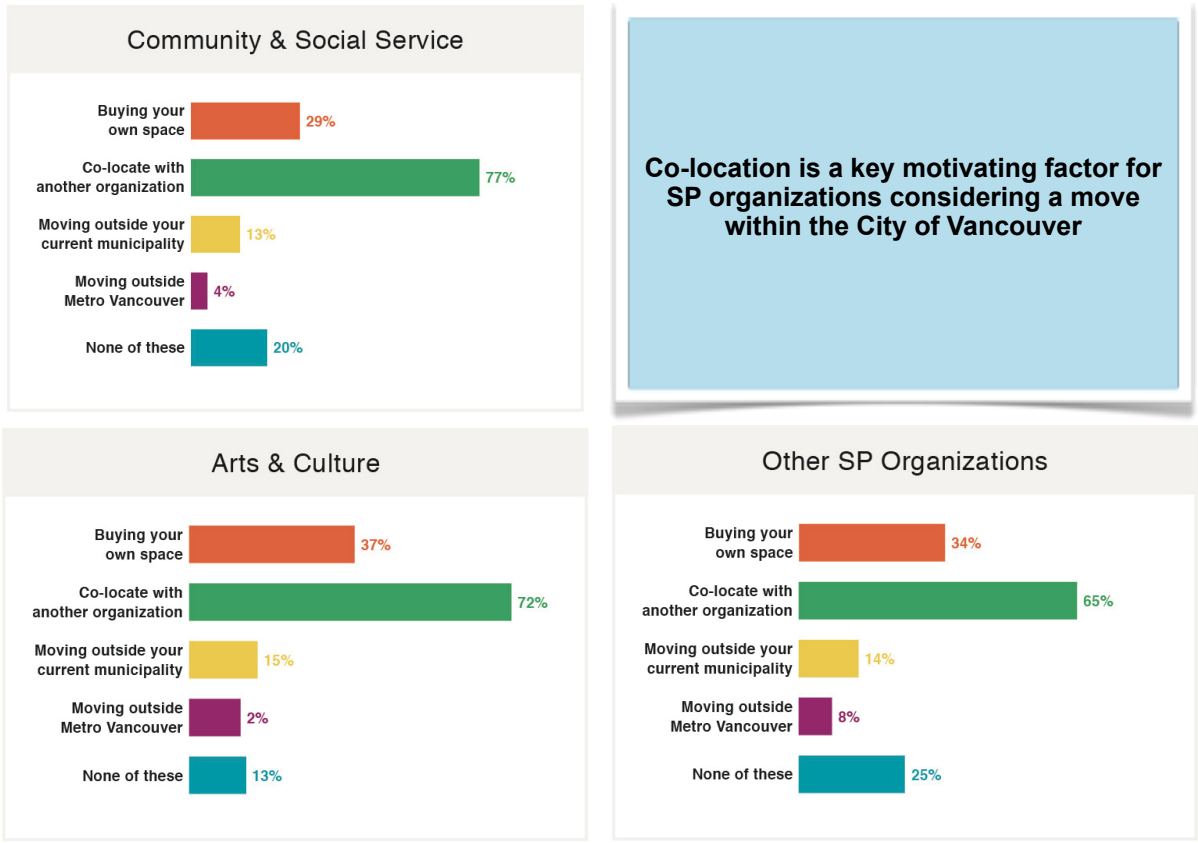
Other SP Organizations



FUTURE MOVE CONSIDERATIONS

Highlights from responses to *Q20a: In a future move, would you consider the following?*

- 77% of Community and Social Service organizations, 72% of Arts and Culture, and 65% of other SP organizations would consider co-location..
- Buying own space (moving from renter/leaser to owner): 29% of Community and Social Service organizations, 37% of Arts and Culture organizations, and 34% of other SP organizations.
- 13% of Community and Social Service Organizations would consider moving outside of Vancouver, and 4% would consider moving outside of Metro Vancouver.
- 15% of Arts and Culture Organizations would consider moving outside of Vancouver, and 2% would consider moving outside of Metro Vancouver.
- 14% of other SP organizations would consider moving outside of Vancouver, and 8% would consider moving outside of Metro Vancouver.



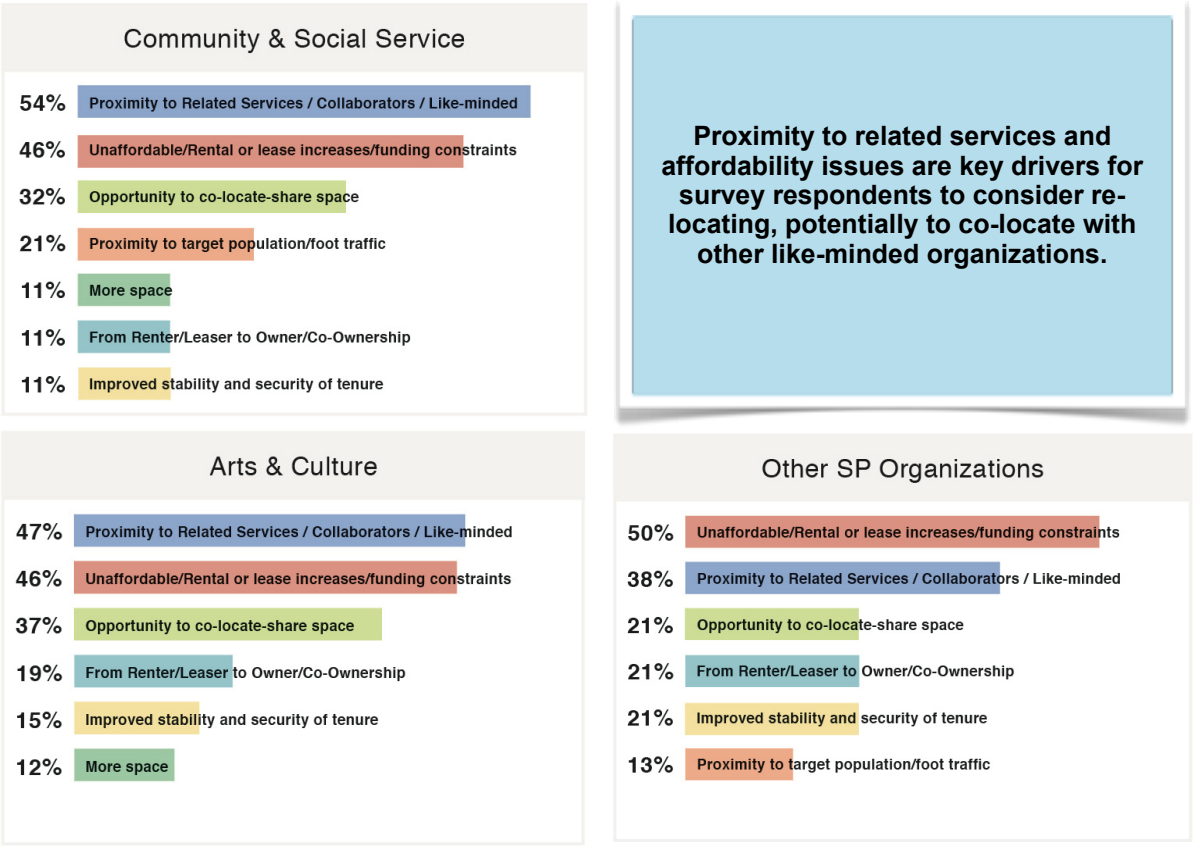
The results indicate that there are some SP organizations considering a move within the next two to five years; in a move, most would prefer to remain located within the City of Vancouver. For those SP organizations who would consider moving, the majority of respondents indicated that they would co-locate with other organizations in order to be closer to related services, like-minded organizations, supporters, and collaborators. The most important reasons for considering a move include the need for more space, lower costs, and better amenities/building features.

REASONS TO MOVE

Highlights from responses to *Q20b: Please describe any opportunities or reasons for your answers above [with respect to consideration to move].*

- The top reasons respondents indicated they would move (based on word-coding analysis), included (i) proximity to related services or like-minded organizations; (ii) affordability issues and constraints; (iii) re-locating to be in closer proximity to target population; (iv) more space; and, (v) improved stability and security of tenure. Opportunity to co-locate was also seen as a motivation to move and re-locate.

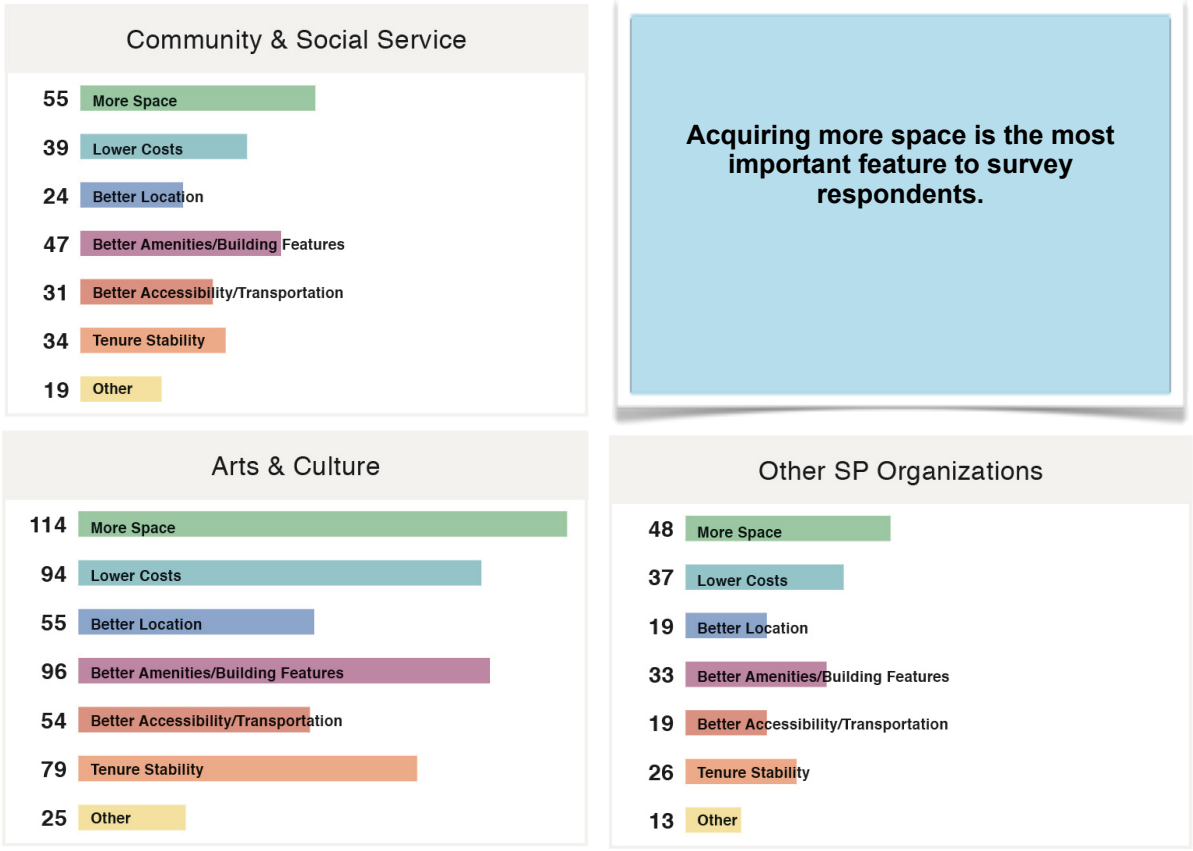
One of the biggest drivers in consideration of potentially moving is to locate within closer proximity to public transportation. According to the survey, 44.9% of Community and Social Service organizations would move for better transit, 34.6% amongst Arts and Culture groups, and 29.2% amongst all Other SP organizations. Overall, a third of respondents from this survey would re-locate for better access to public transportation.



FEATURES CONSIDERED IMPORTANT IN A FUTURE MOVE

Highlights from responses to *Q21a: Which of the following features would you consider important in a future move?*

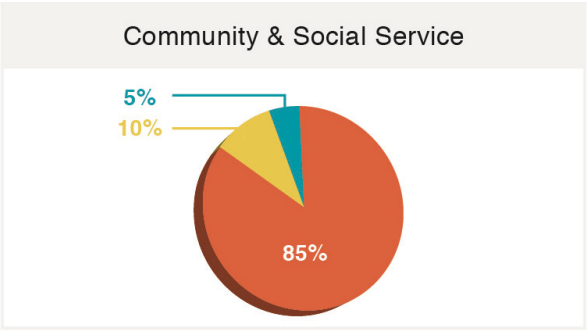
- 80% of Community and Social Service organizations respondents consider more space as important in a future move. 68% indicated that better amenities and building features are important, and 57% are looking for lower costs.
- 73% of Arts and Culture organizations respondents consider more space an important consideration in a future move. 62% indicated that better amenities and building features are important, and 60% are looking for lower costs.
- 74% of other SP organizations respondents would consider more space as an important consideration in a future move. 57% indicated that lower costs would be important, and 40% indicated that tenure stability was important.
- On the whole, location is very important to SP organizations' mandate and effectiveness because of proximity to their clients, as well as being "known" and "recognized" for their location.



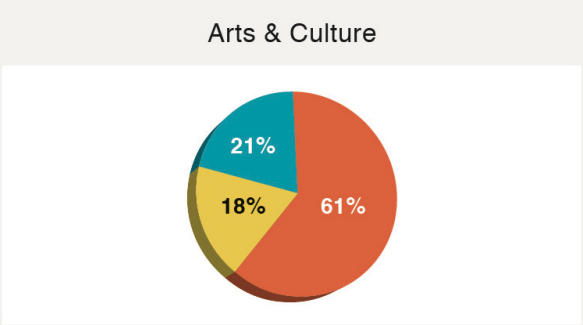
OPERATING COSTS

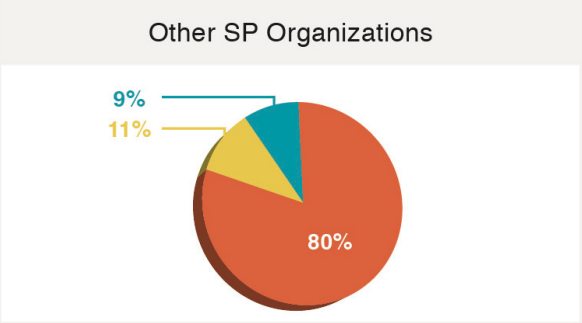
Highlights from responses to *Q26: Approximately what percentage of your annual expenses/operating costs goes towards your lease, rent, mortgage, and other building expenditures such as property taxes and utilities?*

- 85% of Community and Social Service organizations pay less than 30% of their annual expenses/operating costs towards their lease, rent, mortgage, and other building expenditures such as property taxes and utilities.
- 80% of other SP organizations pay less than 30% of their annual expenses/operating costs towards their space costs.
- Arts and Culture organizations spend more towards their space costs compared to Community and Social Service and Other SP organizations, with 21% paying more than 50% towards their lease, rent, mortgage and other building expenditures.



Arts and Culture organizations tend to pay more towards their space costs compared to Community and Social Service and other SP organizations.





Less than 30% **Between 30% and 50%** **More than 50%**

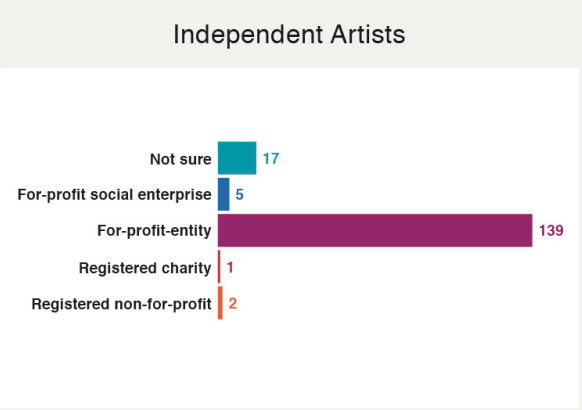
Based on the survey results, SP organizations are small, do not have much money, and want to remain located where they are if possible. Most of them require additional space, but not that much. The over-arching barriers to SP organizations appear to be the ability to remain in their current location in order to serve their client population, and making the leap from operating alone to collaborating with others in order to save money and share resources. Mainly, organizations are willing to co-locate and are seeking opportunities to collaborate with other organizations to make this a reality.

Key Findings from Independent Artists:

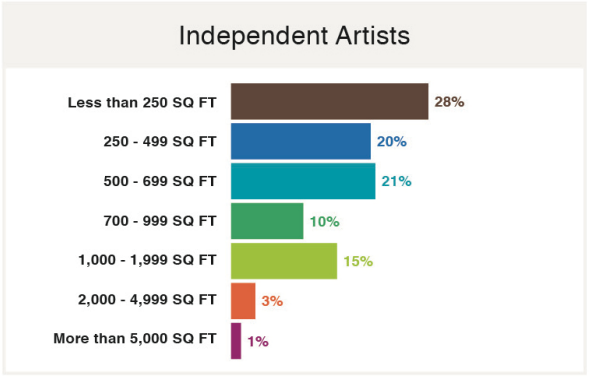
Key findings from Independent Artists have been reported out separately from the rest of the survey respondents, as illustrated below.

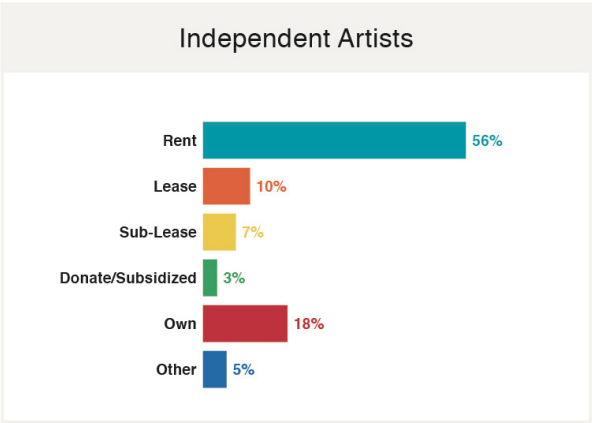
INDEPENDENT ARTISTS QUICK FACTS

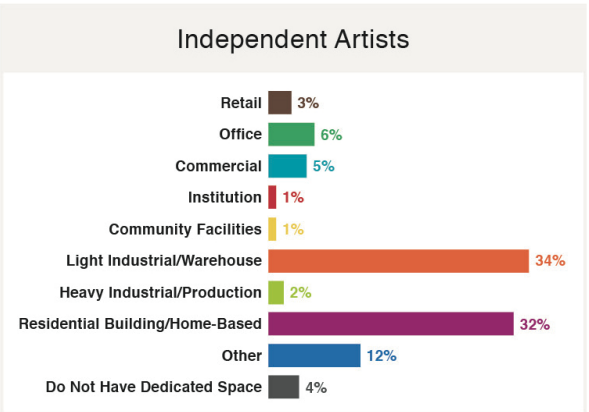
- The majority of Independent Artists identified as “for-profit entity” (85%).
- 55% of Independent Artists share space.
- Independent Artists primarily occupy light industrial/warehouse space (34%), residential buildings/home-based (32%), or other type of space not otherwise specified (12%).

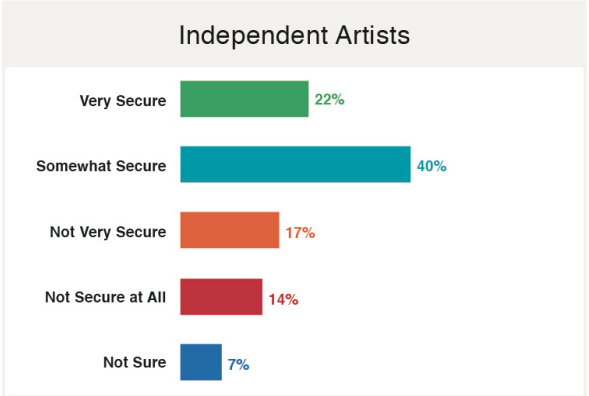


- 79% of Independent Artists occupy less than 1,000 square feet.
- 28% of Independent Artists occupy less than 250 square feet.
- Independent Artists are mostly somewhat satisfied with their space (50%), or very satisfied with their space (21%).
- Most independent Artists rent their space (56%), followed by owning their space (18%), lease (10%), or sub-lease (7%).
- 55% of Independent Artists who own their space would consider redeveloping their space; 20% indicated maybe, and 25% indicated they would not.
- 26% of Independent Artists would consider moving from renter/leaser to owner (buying their own space) if the opportunity became available.
- There is more mobility and interest in moving in order to satisfy space needs amongst Independent Artists, whereby 19% would consider moving outside of Vancouver and 24% would consider moving outside of Metro Vancouver.
- 22% of Independent Artists feel very secure in their space, 40% feel somewhat secure, 17% are not very secure, and 14% are not secure at all.
- Affordability stemmed as the #1 reason that Independent Artists would consider a future move (60%). Other reasons that Independent Artists would consider moving include being in closer proximity to related services and organizations; more space; and move from renter/leaser to owner. 21% of Independent Artists indicated that an opportunity to co-locate would motivate them to re-locate, as well as the opportunity to relocate to a municipality with a better perceived (or supported) creative culture.

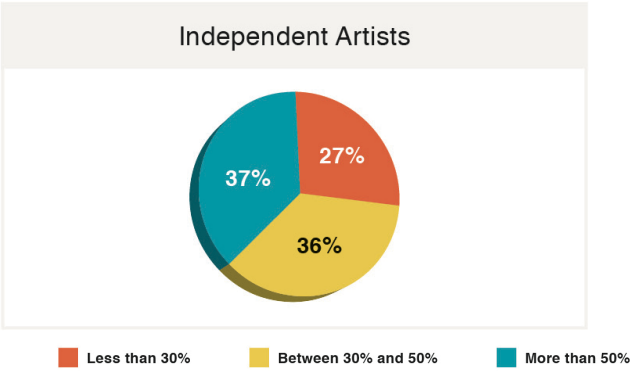


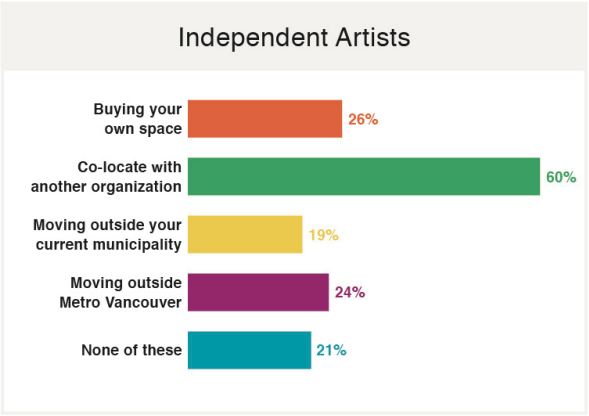






- 37% of Independent Artists spend more than 50% of their costs towards their lease, rent, mortgage and other building expenditures.
- 78% of Independent Artists consider lower costs important when considering a future move; 76% considered more space, and 59% indicated that better amenities and building features would be an important consideration in a future move.
- 60% of Independent Artists would consider co-locating with another organization.
- 43% of Independent Artists would consider moving outside of the City of Vancouver in order to find space that better meets their needs.





Affordability

A key objective of the SPRE survey was to better understand the issues of affordability that SP organizations may be experiencing. Regrettably, this objective was not fully achieved.

The SPRE survey dedicated a specific section on affordability, with questions carefully crafted to obtain information pertaining to base rent, lease, or mortgage payments that SP organizations are paying, as well as other occupancy costs such as utilities, maintenance, taxes, and facility reserve funds. The questions, in-full, can be found within Appendix B: Survey Questions, starting at Question 22 under Part 4: Affordability.

Understanding that not all organizations have occupancy costs, and some organizations may have their occupancy costs included in their rent, the survey provided the option for the respondent to answer a breakout of rent and additional occupancy costs, or the option to answer “all-in rent” (base rent plus additional costs).

These detailed cost questions appeared to be challenging for SP organizations as there were a discernible lack of responses. The majority of survey respondents did not answer a breakout of costs, so there was not enough data collected to report on typical base rent nor occupancy costs. Further, there also appeared to be confusion and varying interpretations amongst survey respondents regarding the cost per square foot ($/SF) question, as there were numerous outlying responses that were illogical compared to real estate norms.

The affordability-related data was further investigated and analyzed by cross-referencing square footage to gross rent in order to yield some generalizations about space costs amongst the SP sector [19]. Even with these calculation checks, there were still a number of outlying responses.

In light of the misinterpretation and in understanding the importance of this question to the goals of the study (i.e. to compare space costs with the real estate industry as a whole in order to learn if SP organizations are paying more, the same, or less than other other organizations) a follow-up affordability sample survey was re-distributed to those SP organizations [20]. The follow-up sample survey provided additional information relating to the question, defining annual base rent and square footage, and provided an example calculation to better assist the respondents with interpreting and answering the question accurately.

The follow-up affordability sample survey yielded 26 responses. Upon review, there appeared to still be misinterpretation of the question amongst some respondents, and 19% made errors in their calculations. A summary table of the results are provided below, with a detailed breakdown of responses provided in Appendix D: Follow-Up Sample Survey.

Table 1.6: Summary Table from the Affordability Follow-Up Sample Survey

Follow-Up Survey Questions: What is your annual base rent? What is your total square footage? What is your rent pre square foot per year (calculation: annual base rent divided by square footage).

	CSS	AC	OTHER SP
# of Respondents **excludes respondents with incorrect calculations*	7	11	3
Average Rent Per Square Foot Per Year ($/SF)	$18.58	$16.50	$16.49

Five out of seven Community and Social Service respondents (71%) identified office space as their space typology. All respondents identified as either a registered not-for-profit, or registered charity, or both; there were zero Community and Social Service respondents who claimed to be for-profit.

Three out of ten Arts and Culture respondents (excluding Independent Artists)[21] (30%) identified office space as their space typology, another 3 (30%) identified residential/home-based, and the remainder included one heavy industrial space user, one commercial, one without dedicated space, and one other. Most Arts and Culture respondents for the follow-up survey were either a not-for-profit or registered charity, with one respondent identifying as a for-profit social enterprise.

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[19] *Rent, lease, and sub-lease responses were cross-referenced between Q7: Current Space Size (square feet); with Q34: Gross Monthly Space Costs. It should be noted that cross-referencing square feet to base rent would have been ideal; however, there were very few responses to base rent. As such, cross-referencing considered square feet to gross rent. The calculation was monthly gross rent divided by the respondents' square footage, and multiplied by twelve to yield what the respondents pay on a dollar per square foot per year ($/SF/Year) basis.*

[20] *The follow-up sample survey included those respondents who originally identified as renters, leasers, or sub-leasers (excluded those SP organizations who identified as owners or occupying donated/subsidized space).*

[21] *There were zero Independent Artists respondents to the follow-up sample survey.*

There were only 3 respondents within the Other SP Organizational category, each identified with a different space typology: (i) office; (ii) commercial; and, (iii) institutional.

Out of all 21 respondents, 10 identified office space as their space typology – more than any other space typology available. As such, the comparison of market rates are based on office space real estate.

The follow-up sample survey only provided an option to insert base/net rental rates (as opposed to the original survey, which had an option of either base rent or gross rent). As such, the results from the follow-up sample survey can be compared to the average asking net rental rates as demonstrated below.

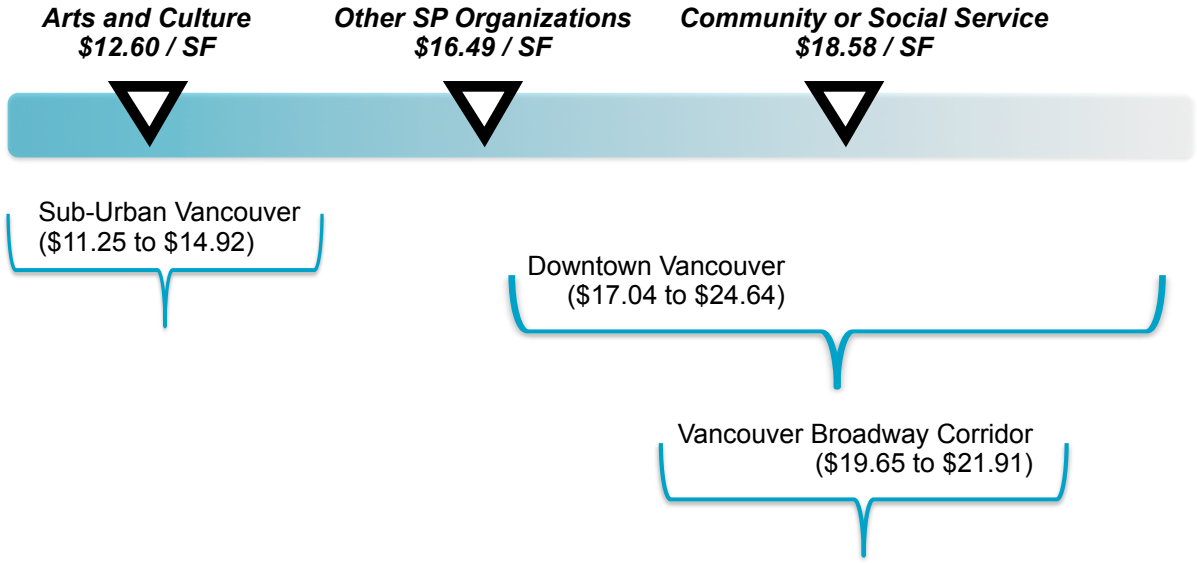
Table 1.7: Office Supply Net Market Rates in the City of Vancouver

Office Supply Market Rates in Metro (Weighted Average Asking Net Rental Rates). (*note: market rates are measured by dollar per square foot per year [$/SF], where $ = Annual Base Rent, and SF= the area that the organization occupies and uses as defined by rental/lease agreement).

	Class C	Class B
Vancouver, Broadway Corridor	$21.91	$19.65
Sub-Urban Vancouver	$11.25	$14.92
Downtown Vancouver	$17.04	$24.64

Source: Colliers International, Vancouver Office Statistics, Q4, 2012

Comparing the market net rental rates within the City of Vancouver to the results from the follow-up sample survey, it appears that Community and Social Service Organizations are paying about market rate, and Other SP organizations are paying on the lower end of market rates. It appears that Arts and Culture Organizations are paying at market rates when comparing to sub-urban Vancouver locations.



Question 26 provided affordability insight with respect to the approximate percentage of respondents' operating costs going towards their lease, rent, mortgage, and other building expenditures. Excluding Independent Artists, the survey results indicated that the majority of SP organizations are paying less than 30% of their annual expenses/operating costs towards their rent/mortgage and other building expenditures such as property taxes and utilities. Specifically, 85% of Community and Social Service Organizations pay less than 30%; 62% of Arts and Culture Organizations pay less than 30%, and 80% of Other SP Organizations pay less than 30%. The majority of Independent Artists respondents (73%) indicated that they pay more than 30% of their annual expenses towards space costs; even more alarming, 37% of Independent Artists indicated that they pay more than 50% of their annual expenses towards these costs.

In addition, results from the open-ended questions indicated that securing an affordable space that is also good quality/well maintained is challenging to their organization. A number of respondents indicated that they would move from their current location due to affordability, rental or lease cost increases, or as a result of funding constraints.

Based on general observations from the original survey responses, as well as results from the follow-up affordability sample survey, it appears that the SP sector typically occupies office space; and, on average, typically do not spend more than $20 per square feet. The majority of Community or Social Service Organizations and Other SP Organizations fall within the lower end of Class B market rates, or in Class C market rates for the Vancouver Broadway Corridor. It also appears that Class B and C office space located within sub-urban areas of Vancouver are within the price-points of most SP organizations.

Spatial Distribution of Respondents

The survey data was complemented by producing a series of maps using postal code data provided by the survey respondents. Since the majority of respondents were located within the City of Vancouver, the mapping scale was based on the City of Vancouver only.

By interpreting the maps of SP organization locations (including Independent Artists), several patterns emerge. Distinct clusters are formed in a number of Vancouver neighbourhoods and are located primarily along arterials or corridors that are part of Vancouver's Frequent Transit Network (FTN). The most notable clusters are found within the neighbourhoods of Mount Pleasant, Grandview-Woodland, Strathcona, Downtown, and the Downtown Eastside. While SP organizations are located in many other neighbourhoods, and to some degree have locational similarities, the clusters are not as prominent as the ones found in the previously mentioned neighbourhoods.

Within each of the neighbourhoods where prominent clusters are found, there appears to be areas where SP organizations gravitate. In Mount Pleasant, most SP organizations are within a block or two of Main Street and East Broadway, with the majority situated along Main Street. In Grandview-Woodland, most SP organizations are located along Commercial Drive, but other discrete clusters appear along William Street and Powell Street in the east-west direction. It is notable that these more discrete clusters are predominantly Independent Artists and are co-located. The clusters in Strathcona are relatively smaller but are more compact as they are mostly co-locating with other organizations. Independent artists dominate these clusters located around Venables Street and Glen Drive. Other small clusters exist along Keefer Street. The Downtown Eastside cluster is somewhat dispersed throughout the neighbourhood but the majority are within a few blocks of East Hastings Street, close to the border with the Downtown neighbourhood. Similarly, the majority of the Downtown clusters are located along East Hastings Street, with a cluster also located in Yaletown. It is important to note a significant amount of the SP organizations in the Downtown and the Downtown Eastside neighbourhoods are co-located, which can be expected due to the high cost of office space in the Downtown, as demonstrated in Section E: Real Estate Overview, and in Table 1.4: Office Supply Market Rates in Metro Vancouver.

With respect to Map 2A (SP Organizations Space Need), most SP organizations require more space in neighbourhoods on the periphery of the Downtown, with a significant number of Community and Social Service organizations requiring space in the Mount Pleasant neighbourhood.

The tenure type maps reveal that the majority of the SP organizations that own their space are located in Strathcona or Downtown. Unexpectedly, a significant proportion of the owners in these two neighbourhoods are Independent Artists. Very few SP organizations that own are located in the neighbourhoods at a significant distance from Downtown. The majority of the renters are once again Independent Artists and the locational pattern matches those of the general pattern previously mentioned, locating along the FTN corridors. Very few SP organizations lease and the ones who do are clustered along Main Street, East Hastings Street, Yaletown and Granville Island.

In terms of affordability, the majority of SP organizations whose operating budget is greater than 30% are predominantly located in the neighbourhoods of Mount Pleasant, Downtown, Downtown Eastside, Strathcona, and Grandview-Woodland. However, the majority of these are located in the Grandview-Woodland and Strathcona neighbourhoods. A relatively significant amount of SP organizations are in the Kitsilano and Fairview neighbourhoods, but are not generally found in clusters.

Over time, office accommodation located along transit routes will likely be impacted by the progressive renewal and increase in density of the City. Currently many are believed to rent in Class C space. Organizations will be obliged to relocate and in seeking locations convenient for employees and clients and accessible to transit will be competing in a more expensive market environment. This will be challenging recognizing the limited budgets that not-for-profit societies operate on.

I. Initial Opportunities that Could Be Explored

Considering the over-arching findings from the survey results and the initial goals of the study, and in keeping consistent with SPRE's three main strategies, supporters of the SP sector (including funders, agencies, government officials, and SP organizations themselves) may wish to consider the following initiatives outlined below.

Prepare a SP Organizational Database

There is an opportunity to network across Metro Vancouver to prepare a comprehensive SP organizational database system that can maintain contact information for this sector and be updated over time. At minimum, this database should include: (i) name of organization; (ii) contact information; (iii) primary activity (advocacy, housing, community or social service, etc.); (iv) location; and, (v) profit versus not-for-profit status.

Assemble a Data Collection Program

There is an opportunity for SPRE funders to collect data on an ongoing basis from SP organizations via capital grants program application forms. Information that could be collected may include total occupied space (square feet), monthly rent, annual space costs, facility costs, common costs, rental/ lease agreement type, and so on. Should the applicant have difficulty completing the application form with respect to the above noted information, then a designated trainer or mentor could assist them with these questions (and sharing knowledge / real estate skills in the process). Data collected over time could be a reliable source to "check" the real estate situation facing the SP sector periodically.

Revisit the Definition of "Social Purpose" and "Social Purpose Real Estate"

There are some discrepancies regarding the definition of social purpose, and what organizations or individuals classify as "social purpose". There were also some challenges with understanding how for-profit entities, such as Independent Artists, compare to not-for-profit groups. As such, revisiting the terminology and providing more detailed explanation of this sector, and "who" is considered "social purpose", could be explored. The terminology can be shared on the SPRE website.

Consider a Comprehensive Social Purpose Policy Study

The policy and regulatory research within the RENT-LEASE-OWN study was limited to a high-level overview of municipal initiatives in Metro Vancouver in order to provide context to the overall survey design: what questions to ask, and how to phrase them. Considering that the majority of survey respondents were located within the City of Vancouver, and considering this report only communicates the key findings from respondents within the City of Vancouver, the SP sector could benefit from a more in-depth analysis on the policies and regulations within the City of Vancouver that correlates with the survey findings from this study. A robust policy study could be published and shared with SP organizations.

Knowledge Building through Mentoring and/or Training Programs

Considering the widespread misinterpretation of real estate terms and inaccurate space costs calculations by survey respondents, it appears that SP organizations could benefit from learning more about real estate "basics", such as determining what their total occupied square footage is, or how much they pay on a dollar per square foot per year basis. This presents an opportunity for a knowledge building program, possibly through a mentoring or training program provided by SP sector supporters: either funders, investors, government officials, etc.

In addition, this is an opportunity to find ways to better communicate information already available to the sector. For example, many respondents indicated that they are considering preparing feasibility studies (in-house or outsourced) with respect to understanding their particular space needs, real estate portfolios, building conditions, and strategic planning. A number of them have already built relationships with other SP organizations and are jointly considering preparing feasibility studies to co-locate. These respondents indicated that they require funding to complete these projects, but suggest that funding is unavailable to them. It appears that some organizations are unaware of funding already available to them, so providing other communication methods to share this information will benefit the sector.

Consider a Co-Location Online Information System Pilot Project

A large number of respondents indicated that they already share space, and another large number of respondents indicated that they would consider co-locating. In addition, most respondents require more space (albeit a small amount), especially meeting rooms and flex space/multi-purpose rooms. Many respondents indicated that they are addressing their space challenges by exploring co-location opportunities, building relationships with like-minded organizations, or seeking partners and funders. There were a number of respondents who suggested the need for more availability of co-location and community hub spaces, or for more co-location development projects be introduced by municipalities, or for an increased availability of subsidized spaces.

These results present an opportunity to explore ways of making available more shared space and co-location opportunities for SP organizations. To start, it may be worth exploring the establishment of an online information system to channel communication amongst SP organizations who are interested in co-locating.

Information sharing could include an SP organization contact database, organizational location preference and space size requirements, as well as a database of available (for rent/lease) co-location and shared space real estate sites, units, and buildings. This database could allow SP organizations to connect with other SP organizations who have similar real estate goals and interests in co-locating, sharing services, or other collaborative opportunities.

Build on the SPRE Toolkit Series

SPRE has already prepared four (4) toolkits to assist SP organizations with their real estate situation; including:

- Toolkit #1: Assessing Your Organization's Program and Facility Needs;
- Toolkit #2: Determining How Much Your Organization Can Borrow;
- Toolkit #3: Fundamentals of Purchasing Real Estate; and,
- Toolkit #4: Protecting Your New Occupancy Budget.

Building on this momentum, the SP sector could benefit from additional toolkits that respond to some of the inquiries from the survey respondents. For example, the overwhelming positive interest of sharing space and co-locating amongst the SP sector is an opportunity to assist the sector with preparing a "how-to" co-locate toolkit. This toolkit could identify shared space-friendly sites or buildings, or provide a step-by-step process on how to co-sign rental and lease agreements.This is also an opportunity to investigate various co-location models, types of shared space, and how these models can be implemented at the policy and regulatory level.

Revenue Generation

A number of respondents indicated that they plan to address their real estate challenges by fundraising, improving their capital campaigning, and finding new or additional donors. Some respondents indicated that they are exploring ways of generating their own revenue through establishing a social enterprise or diversifying their services that generate funds.

There is the opportunity for SP sector supporters to initiate a discussion with the SP sector on how they can branch into revenue generating opportunities, or alternative business models that may combine funding and campaigning with self-sufficient financial generation.

Real Estate Sector Workshop

There is an opportunity to present key findings from the SPRE RENT-LEASE-OWN survey to the professional real estate community (realtors, brokers, investors, developers, etc.), particularly the survey summary tables found in Appendix C. The intention of this workshop (or a series of workshops) would be to provide information to the professional real estate community on the challenges and opportunities facing SP organizations and Independent Artists. The workshops could include discussions on SP organizations space needs and how affordable accommodation and co-location could potentially be implemented.

Communicate Key Elements of Study to Relevant Professional Organizations

There is an opportunity to communicate key elements of this study to relevant professional groups who could, in turn, address some of the SP organizational challenges within their own capability. Some professional organizations to consider include, but not limited to, the following:

- Planning Institute of BC (PIBC);
- Canadian Institute of Planners (CIP);
- Architectural Institute of BC (AIBC);
- BC Non-Profit Housing Society (BCNPHA);
- The Government Non Profit Initiative BC (GNPIBC);
- The Real Estate Institute of BC (REIBC);
- Urban Land Institute (ULI);
- Urban Development Institute (UDI); and,
- The Commercial Real Estate Development Association.

Consider Preparing a Municipal Tools Page for SPRE Website

As outlined in the policy and regulatory scan section in this report, there are a number of municipal policy and regulatory tools and best practices available to help support and strengthen the SP sector. There is an opportunity to prepare a webpage on the SPRE website that identifies some of these tools, and weblinks to additional information and resources such as municipal grant programs and social grant programs already available to SP organizations.

This Study was Generously Funded By:

CITY OF VANCOUVER

Vancity Community Foundation

real estate foundation BRITISH COLUMBIA

Appendix A

Literature Review and Background

Research References

Appendix A: Literature Review and Background Research References

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Appendix B

Survey Questions

Real Estate Institute of BC: Social Purpose Real Estate Project

SURVEY RENT-LEASE-OWN? We need your help to understand the real estate challenges affecting the not-for-profit, social purpose, cultural organizations and artists in Metro Vancouver.

The Real Estate Institute of BC and the Social Purpose Real Estate Collaborative are pleased to announce a research project to benchmark the real estate rates, terms, and conditions in which the social purpose / not-for-profit / cultural organizations and artists function in Metro Vancouver. Survey results will be used to inform future policy development and make the case for supporting social purpose real estate in Metro Vancouver.

This online survey is being hosted and processed by a leading professional research firm, Mustel Group. All responses are strictly confidential and privacy protected. Your identity will not be revealed to the study sponsors and results will be reported in aggregate or unidentified comments. Please help us by completing this survey, and you will be entered to win a free iPad!

PART 1: ORGANIZATIONAL PROFILE

1. Please provide the following contact information.

City/Municipality

Postal Code

In case we need to verify any information please provide your name and contact information:

Name of organization (or artist entrepreneur):

Contact Person (person who completed the survey)

Role/Title

Phone Number

Email Address

We have used the term 'organization' to refer to all respondents, but if you are an independent artist/entrepreneur, this applies to you as well.

2. Is your organization not-for-profit or for-profit?

(Please check all that apply.)

- ☐ Registered not-for-profit
- ☐ Registered charity
- ☐ For-profit entity (e.g. independent artist)
- ☐ For-profit social enterprise
- ☐ Not sure

3a. Which one of the following best describes the primary activity of your organization?

(Please check one.)

- ○ Arts & Culture
- ○ Community or Social Service
- ○ Recreation & Sport
- ○ Advocacy
- ○ Employment & Training
- ○ Housing
- ○ Childcare
- ○ Health Services
- ○ Other (Please describe): _____
- ○

3b. Are there any other activities your organization is involved in?

- ○ Arts & Culture
- ○ Community or Social Service
- ○ Recreation & Sport
- ○ Advocacy
- ○ Employment & Training
- ○ Housing
- ○ Childcare
- ○ Health Services
- ○ Other (Please describe): _____
- ○

4. Please tell us your staff composition.

(NOTE: We understand that for some organizations staffing varies throughout the year. Please indicate your staff numbers on average.)

a. On average, approximately how many paid staff (full time equivalent) work for your organization (at all of your sites/locations)? ☐

b. On average, approximately how many volunteers assist your organization (at all of your sites/locations)? ☐

PART 2: LOCATION & SPACE NEEDS

5. How many sites do you operate out of?

(if you are a housing provider, please exclude housing sites.) ☐

6. Do you currently share space with another organization?

(This includes artists' collectives).

- ○ Yes
- ○ No

Please answer this next question based on the space your organization occupies (including any shared space that you use—e.g., meeting rooms, etc.).

7. What is the approximate size in total square footage of your organization's primary space (if you are a housing provider, please exclude housing sites)?

[If you have more than one site, please answer for the primary site] [If you share space, how much?] [Example: 3500 square feet] Please enter numbers only - no commas or spaces.

☐

8. Please answer for each additional site:

(Please enter numbers only - no commas or spaces.)

	Square feet	Postal code
Site #2	☐	☐
Site #3	☐	☐
Site #4	☐	☐
Site #5	☐	☐
Site #6	☐	☐
Site #7	☐	☐
Site #8	☐	☐
Site #9	☐	☐
Site #10	☐	☐

9. Which of the following best describes the space that you are currently operating out of (your primary space)?

- ○ Retail
- ○ Office
- ○ Commercial
- ○ Institutional (e.g. schools, colleges, hospitals)
- ○ Community Facilities
- ○ Light Industrial / Warehouse
- ○ Heavy Industrial / Production (ie. heavy machinery)
- ○ Residential building/ Home-based
- ○ Do not have dedicated space
- ○ Other (Please describe) _____

10. Does this space meet your organizational needs?

- ○ Very Satisfactory
- ○ Somewhat Satisfactory
- ○ Not Very Satisfactory
- ○ Not at all Satisfactory

11. Within the next 5 years, what space requirements do you estimate your group will need?

- ○ Less
- ○ Same
- ○ More

12. How much additional space would you require to meet your organizational needs?
(Please enter numbers only - no commas or spaces.)

[ ]

13. Please tell us about any major building components, features or amenities that are important to your organization, but you do not currently have access to as part of your primary space.

[ ]

PART 3: TENURE AND STABILITY

14. Do you own, rent, or lease your primary space/headquarters?

- ○ Own
- ○ Rent
- ○ Lease
- ○ Sub-lease from another organization
- ○ Use space that is donated/subsidized
- ○ Other (Please describe): _____

15a. If you rent or lease, when does your lease/rental agreement expire for primary space?

- ○ No written rental agreement
- ○ Month-to-Month
- ○ Less than a year
- ○ Between 1 and up to 2 years
- ○ Between 2 and 5 years
- ○ More than 5 years
- ○ Not applicable
- ○ Between 1 and up to 2 years

15b. Are there any other restrictions on your lease/rental agreement (such as a redevelopment clause, limited operating hours, etc.)?

[ ]

16. If you own, would you consider or have you considered redeveloping any of your sites to better meet your needs?

- ○ Yes
- ○ No
- ○ Maybe

17. In your opinion, how secure/stable is your space for next 5 years (i.e. confident in ability to renew lease or maintain space)?

- ○ Very Secure
- ○ Somewhat Secure
- ○ Not Very Secure
- ○ Not Secure At All
- ○ Not sure

18a. What scale best describes the client population that your organization serves?

- ○ Neighbourhood
- ○ City-wide
- ○ Regional
- ○ Provincial
- ○ National
- ○ Does not matter / not applicable
- ○ Not sure

18b. How important is your current location(s) to your organization's mandate, function or effectiveness?

- ○ Very Important
- ○ Somewhat Important
- ○ Not Very Important
- ○ Not Important At All
- ○ Not sure

18c. Why? Please explain. [ ]

19. Will your organization need to move in the coming years?

- ○ Yes, within the next two years
- ○ Yes, within the next five years
- ○ Yes, in 5 years or more
- ○ No, we will not need to move
- ○ Not sure

20a. In a future move, would you consider the following?
(Please check all that apply.)

- ☐ Buying your own space
- ☐ Co-locate with another organization
- ☐ Moving outside the municipality you are currently in
- ☐ Moving outside Metro Vancouver
- ☐ None of these

20b. Please describe any opportunities or reasons for your answers above:

[ ]

21a. Which of the following features would you consider important in a future move?
(Please check all that apply.)

- ☐ More space
- ☐ Lower costs
- ☐ Better location
- ☐ Better amenities/building features
- ☐ Better accessibility/transportation options
- ☐ Tenure Stability
- ☐ Other (Please describe): _____
- ☐ Not sure

21b. Which one is most important?

(Please check one)

- ☐ More space
- ☐ Lower costs
- ☐ Better location
- ☐ Better amenities/building features
- ☐ Better accessibility/transportation options
- ☐ Tenure Stability
- ☐ Other (Please describe): _____
- ☐ Not sure

PART 4: AFFORDABILITY This section is an important part of study. If you are not familiar with the types of costs in the questions below, please source that information prior to completing these questions.

22. If you lease/rent, what are your monthly total costs?

- ○ Can provide breakout (rent, utilities, maintenance, taxes, facility reserve fund)
- ○ Can provide total only

(Round to whole numbers. Please enter numbers only - no commas or spaces.)

Base Rent or lease payment:	
Utilities (excluding phone, cable, security, cleaning):	
Maintenance:	
Taxes:	
Facility Reserve Funds:	
All-in-Rent (Including base rent plus additional costs):	

23. What is your total cost/rent per square foot?

(Round to whole numbers. Please enter numbers only - no commas or spaces.) ☐

24. If your space is donated, do you pay something to the owner of the space?

(Please enter numbers only - no commas or spaces.)

Rent	
Utilities	
Common Area Costs	
Other	

25. If you own, what are your monthly total costs?

- ○ Can provide breakout (rent, utilities, maintenance, taxes))
- ○ Can provide total only

(Please enter numbers only - no commas or spaces.)

Mortgage Payment: ☐

Utilities (excluding phone, cable, security, cleaning)::: ☐

Maintenance: ☐

Taxes: ☐

Facility Reserve Funds: ☐

Please enter numbers only - no commas or spaces

Total Monthly Costs (Including mortgage payments plus additional costs): ☐

The following questions will assist us to understand the relationship between real estate costs and organizations' capacity to pay for real estate.

26. Approximately what percentage of your annual expenses/operating costs goes towards your lease, rent, mortgage, and other building expenditures such as property taxes and utilities?

- ○ Less than 30%.
- ○ Between 30% and 50%.
- ○ More than 50%.

27. What is the maximum monthly cost (per square foot) that your organization would spend on space-related costs?

(Please enter numbers only - no commas or spaces.) ☐

PART 5: PLEASE TELL US MORE

28. What challenges does your organization face (if any) in securing an affordable and suitable space(s).

29. What strategies or approaches are your organization planning to undertake in the coming years to respond to these real estate and space challenges.

30. Do you have any suggestions for funders or other agencies in terms of how they can assist your organization to achieve affordable, suitable and secure space arrangements?

To assist in better understanding the situation for different types of social purpose organizations and artist entrepreneurs, are you willing to share your organization's identity and responses with the study sponsors (SPRE, REIBC, City of Vancouver, Vancity)?

- ○ Yes
- ○ No

THANK YOU!

Please press submit to complete the survey and to enter a draw to win a free iPad! If you require technical assistance for the survey, please contact Phil Giborski with Mustel Group at 604.742.2244. For all other inquires, please contact Jada Martinson, Project Manager with CitySpaces Consulting at jmartinson@cityspaces.ca / 604.687.2281 extension 229, or Brenda Southam with the Real Estate Institute of BC at bsoutham@reibc.org / 604.685.3702 extension 104. We are happy to answer any questions regarding the project or the questions/ information being asked.

Appendix C

Survey Summary Tables

Appendix C: Survey Summary Tables

The SPRE survey targeted 1,179 organizations in a pre-determined directory, and was also made available through an open web link and advertised through network notifications and a newspaper advertisement. It was originally hoped that 25% of the targeted group would respond, or approximately 300 surveys. The survey received 592 responses. Of those 592 surveys, 407 of them were completed in-full.

The following tables summarize the findings from the survey questions. For some some questions, respondents were asked to "check all that apply", so the total can be greater than 592. In other cases, not all responses answered the questions, so totals may be less than 592.

For the purpose of reporting, the key to tables displayed below read as follows:

- **Community & Social Service Organizations = CSS**
- **Independent Artists = IA**
- **Arts & Culture Organizations (excludes independent artists) = AC**
- **All Other Social Purpose Organizations = Other**

PART 1: Organizational Profile

Q2: Is your organization not-for-profit or for-profit? (Please check all that apply)								
	CSS		**IA**		**AC**		**OTHER SP**	
	#	%	#	%	#	%	#	%
Registered Not-For-Profit	63	73%	2	1%	114	63%	59	71%
Registered Charity	51	59%	1	1%	60	33%	43	52%
For-Profit-Entity (e.g. independent artist)	4	5%	139	85%	39	22%	8	10%
For-Profit Social Enterprise	5	6%	5	3%	14	8%	12	14%
Not Sure	4	5%	17	10%	9	5%	2	2%
SUB-TOTAL RESPONDENTS		86		163		181		83
TOTAL NUMBER OF RESPONDENTS								513

CODE TO DATABASE: Q2, Page 11

Q3b: Are there any other activities your organization is involved in? (Please check all that apply).								
Activity	**CSS**		**IA**		**AC**		**OTHER SP**	
	#		#	%	#	%	#	%
Community & Social Service	-	-	16	10%	47	26%	37	45%
Arts & Culture	26	30%	163	100%	-	-	17	20%
Advocacy	37	43%	12	7%	26	14%	32	39%
Employment & Training	23	27%	10	6%	21	12%	22	27%
Housing	10	12%	0	0%	4	2%	25	30%
Childcare	12	14%	0	0%	2	1%	9	11%
Health Services	9	10%	1	1%	4	2%	20	24%
Recreation & Sport	11	13%	6	4%	16	9%	3	4%
Other	28	33%	20	12%	24	13%	40	48%
SUB-TOTAL RESPONDENTS		86		163		181		83
TOTAL NUMBER OF RESPONDENTS								513

CODE TO DATABASE: Q3b, Page 31

Q4A: On average, approximately how many paid staff (full time equivalent) work for your organization (all all of your sites/locations)?								
# of Employees	**CSS**		**IA**		**AC**		**OTHER SP**	
	#	%	#	%	#	%	#	%
0	6	7%	89	57%	48	27%	10	13%
1	14	17%	67	43%	34	19%	10	13%
2	12	14%	0	0%	33	18%	2	3%
3	10	12%	0	0%	17	9%	8	10%
4	8	10%	0	0%	12	7%	4	5%
5	2	2%	0	0%	5	3%	6	8%

Q4A: On average, approximately how many paid staff (full time equivalent) work for your organization (all all of your sites/locations)?								
# of Employees	**CSS**		**IA**		**AC**		**OTHER SP**	
6 - 9	7	8%	0	0%	12	7%	15	19%
10-19	9	11%	0	0%	8	4%	10	13%
> 20	15	18%	0	0%	10	6%	14	18%
SUB-TOTAL RESPONDENTS		83		156		179		79
TOTAL NUMBER OF RESPONDENTS								497

CODE TO DATABASE: Q4a, Page 43

Q4B: On average, approximately how many volunteers assist your organization (at all of your sites/locations)?								
# of Volunteers	**CSS**		**IA**		**AC**		**OTHER SP**	
	#	%	#	%	#	%	#	%
0	0	0%	134	86%	13	7%	11	14%
1	5	6%	19	12%	9	5%	7	9%
2	2	2%	2	1%	13	7%	4	5%
3 - 5	6	7%	1	1%	27	15%	7	9%
6 - 9	8	10%	0	0%	19	11%	5	6%
10	5	6%	0	0%	16	9%	5	6%
11 - 19	9	11%	0	0%	10	6%	6	8%
20	3 - 5	4%	0	0%	17	9%	5	6%
> 20	45	54%	0	0%	55	31%	29	37%
SUB-TOTAL RESPONDENTS		83		156		179		79
TOTAL NUMBER OF RESPONDENTS								497

CODE TO DATABASE: Q4b, Page 53

PART 2: Location and Space Needs

Q5: How many sites do you operate out of? (If you are a housing provider, please exclude housing sites).

	CSS		IA		AC		OTHER SP	
	#	%	#	%	#	%	#	%
1	50	61%	123	80%	120	68%	50	63%
2	8	10%	29	19%	33	19%	12	15%
3	8	10%	1	1%	10	6%	8	10%
4	2	2%	1	1%	6	3%	0	0%
5	4	5%	0	0%	5	3%	2	3%
> 6	10	12%	0	0%	2	1%	7	9%
SUB-TOTAL RESPONDENTS		82		154		176		79
TOTAL NUMBER OF RESPONDENTS								491

CODE TO DATABASE: Q5, Page 61

Q6: Do you currently share space with another organization? (This includes artists' collectives).

	CSS		IA		AC		OTHER SP	
	#	%	#	%	#	%	#	%
Yes	43	52%	69	45%	70	40%	31	39%
No	39	48%	84	55%	107	60%	48	61%
SUB-TOTAL RESPONDENTS		82		153		177		79
TOTAL NUMBER OF RESPONDENTS								491

CODE TO DATABASE: Q6, Page 73

Q7: What is the approximate size in total square footage of your organization's primary space? (if you are a housing provider, please exclude housing sites). [If you have more than one site, please answer for the primary site]. [If you share space, how much?] [Example: 3500 square feet].

SQUARE FEET	CSS		IA		AC		OTHER SP	
	#	%	#	%	#	%	#	%
< 250	11	15%	41	28%	32	20%	12	16%

Q7: What is the approximate size in total square footage of your organization's primary space? (if you are a housing provider, please exclude housing sites). [If you have more than one site, please answer for the primary site]. [If you share space, how much?] [Example: 3500 square feet].

SQUARE FEET	CSS		IA		AC		OTHER SP	
250 - 499	8	11%	29	20%	23	14%	10	14%
500 - 699	6	8%	30	21%	24	15%	2	3%
700 - 999	2	3%	15	10%	17	10%	2	3%
1,000 - 1,999	14	19%	22	15%	24	15%	15	20%
2,000 - 4,999	15	20%	5	3%	23	14%	19	26%
> 5,000	19	25%	2	1%	20	12%	14	19%
SUB-TOTAL RESPONDENTS		75		144		163		74
TOTAL NUMBER OF RESPONDENTS								456

CODE TO DATABASE: Q7, Page 83

Q9: Which of the following best describes the space that you are currently operating out of (your primary space)?

TYPOLOGY	CSS		IA		AC		OTHER SP	
	#	%	#	%	#	%	#	%
Retail	3	4%	4	3%	7	4%	2	3%
Office	23	32%	8	6%	38	24%	32	46%
Commercial	3	4%	7	5%	13	8%	4	6%
Institution	7	10%	2	1%	3	2%	5	7%
Community Facilities	16	23%	1	1%	18	11%	8	11%
Light Industrial / Warehouse	3	4%	49	34%	18	11%	5	7%
Heavy Industrial / Production	0	0%	3	2%	2	1%	0	0%
Residential Building / Home-Based	11	15%	46	32%	37	23%	8	11%

Q9: Which of the following best describes the space that you are currently operating out of (your primary space)?								
TYPOLOGY	**CSS**		**IA**		**AC**		**OTHER SP**	
Other	2	3%	17	12%	14	9%	4	6%
Do Not Have Dedicated Space	3	4%	6	4%	11	7%	2	3%
SUB-TOTAL RESPONDENTS		71		143		161		70
TOTAL NUMBER OF RESPONDENTS								445

CODE TO DATABASE: Q9, Page 123

Q10: Does this space meet your organizational needs?								
	CSS		**IA**		**AC**		**OTHER SP**	
	#	%	#	%	#	%	#	%
Very Satisfactory	11	15%	30	21%	29	18%	25	36%
Somewhat Satisfactory	37	52%	72	50%	71	44%	29	41%
Not Very Satisfactory	14	20%	29	20%	33	20%	13	19%
Not St All Satisfactory	9	13%	12	8%	28	17%	3	4%
SUB-TOTAL RESPONDENTS		71		143		161		70
TOTAL NUMBER OF RESPONDENTS								445

CODE TO DATABASE: Q10, Page 131

Q11: Within the next 5 years, what space requirements do you estimate your group will need?								
	CSS		**IA**		**AC**		**OTHER SP**	
	#	%	#	%	#	%	#	%
Less	1	1%	0	0%	1	1%	2	3%
Same	18	25%	47	33%	48	30%	22	31%
More	52	73%	95	67%	112	70%	46	66%

Q11: Within the next 5 years, what space requirements do you estimate your group will need?				
	CSS	**IA**	**AC**	**OTHER SP**
SUB-TOTAL RESPONDENTS	71	142	161	70
TOTAL NUMBER OF RESPONDENTS				444

CODE TO DATABASE: Q11, Page 141

Q12: How much additional space would you require to meet your organizational needs?								
SQUARE FEET	**CSS**		**IA**		**AC**		**OTHER SP**	
	#	%	#	%	#	%	#	%
< 99	0	0%	3	3%	3	3%	1	2%
100 - 250	5	10%	24	25%	7	6%	4	9%
251 - 500	9	17%	37	39%	22	20%	11	24%
501 - 1,000	10	19%	21	22%	33	29%	9	20%
1,001 - 2,000	15	29%	9	9%	24	21%	8	17%
2,001 - 5,000	6	12%	0	0%	14	13%	9	20%
> 5,000	7	13%	1	1%	9	8%	4	9%
SUB-TOTAL RESPONDENTS		52		95		112		46
TOTAL NUMBER OF RESPONDENTS								305

CODE TO DATABASE: Q12, Page 153

Q13: Please tell us about any major building components, features or amenities that are important to your organization, but you do not currently have access to as part of your primary space. (open-ended question, word coding).								
	CSS		**IA**		**AC**		**OTHER SP**	
	#	%	#	%	#	%	#	%
Meeting Space (Boardrooms and Private Rooms)	33	61%	7	7%	34	26%	24	59%

Q13: Please tell us about any major building components, features or amenities that are important to your organization, but you do not currently have access to as part of your primary space. (open-ended question, word coding).								
	CSS		**IA**		**AC**		**OTHER SP**	
Flex Space/Multi-Purpose Rooms	29	54%	13	13%	32	25%	8	20%
Kitchen/Commercial Kitchen	13	24%	6	6%	16	12%	14	34%
Office Space	13	24%	2	2%	38	29%	14	34%
Storage	13	24%	12	12%	42	32%	15	37%
Event/Rehearsal Space	12	22%	16	16%	52	40%	3	7%
Accessibility (Wheelchair Ramps, Lifts, Etc.)	8	15%	2	2%	14	11%	5	12%
Materials/production Equipment	7	13%	17	17%	23	18%	10	24%
Store Front/ground Level	7	13%	7	7%	10	8%	3	7%
Access To Outdoor Space/yard/garden	7	13%	4	4%	2	2%	3	7%
Washroom Facilities	5	9%	7	7%	13	10%	5	12%
Workshop/industrial Space	5	9%	24	24%	30	23%	1	2%
Parking/industrial Space	3	6%	1	1%	3	2%	5	12%
Soundproofing	3	6%	8	8%	13	10%	0	0%
Natural Light/ Windows	3	6%	23	23%	11	8%	0	0%
Ventilation, Heating, Insulation, Electrical, Plumbing	3	6%	45	45%	22	17%	6	15%
Telecom Infrastructure/Wi-Fi	1	2%	3	3%	9	7%	5	12%
Security/Surveillance Systems	2	4%	4	4%	10	8%	1	2%
Freight Elevator	2	4%	7	7%	11	8%	1	2%

Q13: Please tell us about any major building components, features or amenities that are important to your organization, but you do not currently have access to as part of your primary space. (open-ended question, word coding).								
	CSS		**IA**		**AC**		**OTHER SP**	
Library	2	4%	0	0%	5	4%	1	2%
Ongoing Maintenance/ repair	1	2%	5	5%	9	7%	2	5%
Loading Bay	1	2%	9	9%	10	8%	1	2%
24 Hour Accessible Building	1	2%	0	0%	5	4%	1	2%
Program Space	1	2%	0	0%	7	5%	0	0%
Laundry Facilities	1	2%	1	1%	2	2%	0	0%
Industrial/large Sink	1	2%	19	19%	2	2%	1	2%
Good Lighting	0	0%	8	8%	6	5%	1	2%
Specific Flooring Type	0	0%	7	7%	9	7%	0	0%
High Ceilings	0	0%	4	4%	11	8%	0	0%
Large/Wide Doors	0	0%	4	4%	1	1%	0	0%
SUB-TOTAL RESPONDENTS		177		265		452		130
TOTAL NUMBER OF RESPONDENTS								324

CODE TO DATABASE: 13, Page 161

PART 3: Tenure and Stability

Q14: Do you own, rent, or lease your primary space/headquarters?								
TENURE	**CSS**		**IA**		**AC**		**OTHER SP**	
	#	%	#	%	#	%	#	%
Rent	19	27%	92	56%	61	39%	22	33%
Lease	16	23%	17	10%	39	25%	16	24%
Sub-Lease	4	6%	11	7%	10	6%	4	6%
Donated/ Subsidized	17	24%	5	3%	19	12%	14	32%
Own	12	17%	30	18%	15	10%	9	14%

Q14: Do you own, rent, or lease your primary space/headquarters?								
TENURE	**CSS**		**IA**		**AC**		**OTHER SP**	
Other	2	3%	8	5%	13	8%	1	2%
SUB-TOTAL RESPONDENTS		70		163		157		66
TOTAL NUMBER OF RESPONDENTS								456

CODE TO DATABASE: Q14, Page 173

Q15a: If you rent or lease, when does your lease/rental agreement expire for your primary space?								
AGREEMENT TYPE	**CSS**		**IA**		**AC**		**OTHER SP**	
	#	%	#	%	#	%	#	%
No Written Agreement	1	3%	13	12%	9	8%	3	8%
Month-To-Month	8	21%	64	60%	34	32%	8	21%
Less Than 1 Year	6	16%	8	7%	13	12%	2	5%
Between 1 - 2 Years	9	24%	11	10%	13	12%	12	31%
Between 2- 5 Years	13	34%	4	4%	18	17%	10	26%
Greater Than 5 Years	0	0%	2	2%	10	9%	4	10%
n/a	1	3%	5	5%	9	8%	0	0%
SUB-TOTAL RESPONDENTS		38		107		106		39
TOTAL NUMBER OF RESPONDENTS								290

CODE TO DATABASE: Q15a, Page 183

Q15b: Are there any other restrictions on your lease/rental agreement (such as a redevelopment clause, limited operating hours, etc.)? (open-ended question, word coding).								
	CSS		**IA**		**AC**		**OTHER SP**	
	#	%	#	%	#	%	#	%
Renovation Is Restricted	1	20%	1	7%	1	4%	1	14%
Redevelopment Is Restricted	2	40%	0	0%	2	8%	1	14%
Renovation Clause	0	0%	0	0%	2	8%	0	0%
Demolition Clause	0	0%	1	7%	1	4%	1	14%
Redevelopment Clause	0	0%	1	7%	0	0%	0	0%
Non-Formal, Proposed Redevelopment From Leased/ Rental Building	0	0%	0	0%	2	8%	1	14%
Limited Operating Hours	1	20%	4	27%	12	46%	2	29%
Noise Restrictions	1	20%	3	20%	7	27%	0	0%
Limited Areas Of Access On The Property/In Building	1	20%	0	0%	1	4%	1	14%
Restricted Building Maintenance Contract	1	20%	0	0%	1	4%	0	0%
Standard Residential Lease Restrictions	0	0%	2	13%	2	8%	0	0%
No Toxic Substances	0	0%	2	13%	0	0%	0	0%
Lease Renewal Not Guaranteed	0	0%	1	7%	0	0%	0	0%
No Sublet	0	0%	1	7%	1	4%	0	0%

Q15b: Are there any other restrictions on your lease/rental agreement (such as a redevelopment clause, limited operating hours, etc.)? (open-ended question, word coding).								
	CSS		**IA**		**AC**		**OTHER SP**	
Programming Requirements (Must Do "this" In Space)	0	0%	1	7%	1	4%	0	0%
Limited Occupancy Time	0	0%	0	0%	1	4%	0	0%
Parking Restrictions	0	0%	0	0%	1	4%	0	0%
SUB-TOTAL RESPONDENTS		5		15		26		7
TOTAL NUMBER OF RESPONDENTS								53

CODE TO DATABASE: Q15b, Page 201

Q16: If you own, would you consider or have you considered redeveloping any of your sites to better meet your needs?								
TENURE	**CSS**		**IA**		**AC**		**OTHER SP**	
	#	%	#	%	#	%	#	%
Yes	6	50%	11	55%	8	57%	5	56%
No	2	17%	5	25%	3	21%	1	11%
Maybe	4	33%	4	20%	3	21%	3	33%
SUB-TOTAL RESPONDENTS		12		20		14		9
TOTAL NUMBER OF RESPONDENTS								55

CODE TO DATABASE: Q16, Page 201

Q17: In your opinion, how secure/stable is your space for the next 5 years (ie. confident in ability to renew lease or maintain space)?								
Security / Stability	**CSS**		**IA**		**AC**		**OTHER SP**	
	#	%	#	%	#	%	#	%
Very Secure	23	33%	30	22%	46	29%	22	33%

Q17: In your opinion, how secure/stable is your space for the next 5 years (ie. confident in ability to renew lease or maintain space)?								
Security / Stability	**CSS**		**IA**		**AC**		**OTHER SP**	
Somewhat Secure	25	36%	56	40%	47	30%	25	38%
Not Very Secure	13	19%	23	17%	23	15%	12	18%
Not Secure At All	8	11%	20	14%	30	19%	5	8%
Not Sure	1	1%	10	7%	11	7%	2	3%
SUB-TOTAL RESPONDENTS		70		139		157		66
TOTAL NUMBER OF RESPONDENTS								432

CODE TO DATABASE: Q17, Page 213

Q18a: What scale best describes the client population that your organization serves?								
	CSS		**IA**		**AC**		**OTHER SP**	
	#	%	#	%	#	%	#	%
Neighbourhood	22	32%	3	2%	10	6%	6	9%
City-wide	23	33%	39	29%	48	31%	20	30%
Regional	13	19%	13	10%	34	22%	17	26%
Provincial	9	13%	2	1%	14	9%	19	29%
National	1	1%	36	27%	41	26%	2	3%
Does not matter / not applicable	1	1%	28	21%	7	4%	2	3%
Not Sure	0	0%	14	10%	3	2%	0	0%
SUB-TOTAL RESPONDENTS		69		135		157		66
TOTAL NUMBER OF RESPONDENTS								427

CODE TO DATABASE: Q18a, Page 221

Q18b: How important is your current location(s) to your organization's mandate, function, or effectiveness?								
	CSS		**IA**		**AC**		**OTHER SP**	
	#	%	#	%	#	%	#	%
Very Important	39	57%	43	32%	68	43%	34	52%
Somewhat Important	25	36%	61	45%	53	34%	24	36%
Not Very Important	4	6%	24	18%	23	15%	3	5%
Not Important at All	1	1%	1	1%	10	6%	5	8%
Not Sure	0	0%	6	4%	3	2%	0	0%
SUB-TOTAL RESPONDENTS		69		135		157		66
TOTAL NUMBER OF RESPONDENTS								427

CODE TO DATABASE: Q18b, Page 231

Q18c: Why? Please explain. (open-ended question, word coding).								
	CSS		**IA**		**AC**		**OTHER SP**	
	#	%	#	%	#	%	#	%
Proximity To Target Population / Foot Traffic	39	64%	19	16%	26	18%	20	34%
Accessibility	22	36%	26	21%	44	31%	21	36%
Being "Recognized" - Known For Location, Image/profile Linked To Location, Location = Brand, Building/ built Environment Part Of Organizational Identity	18	30%	18	15%	30	21%	11	19%

Q18c: Why? Please explain. (open-ended question, word coding).								
	CSS		**IA**		**AC**		**OTHER SP**	
Proximity To Transportation / Transit	16	26%	9	7%	17	12%	12	20%
Proximity To Related Services / Collaborators / Like-minded / Supporters	10	16%	36	30%	40	28%	10	17%
Proximity To Amenities	0	0%	5	4%	1	1%	1	2%
Location Is Not Important To Organizations Who Are Residential/ home-based	5	8%	20	17%	25	17%	8	14%
Location Is Not As Important To Regional/ provincial/ national Organizations	1	2%	1	1%	3	2%	0	0%
Proximity To Vancouver, Downtown Core	2	3%	7	6%	6	4%	2	3%
Proximity / Access To Supplies And Resources	3	5%	13	11%	7	5%	6	10%
Current Location Is Not Suitable	3	5%	11	9%	12	8%	3	5%
Location Associated With Affordability Of Land/building/ real Estate	2	3%	9	7%	8	6%	4	7%
Parking Availability	2	3%	3	2%	4	3%	2	3%
Proximity Of Home To Place Of Work	1	2%	19	16%	7	5%	3	5%

Q18c: Why? Please explain. (open-ended question, word coding).								
	CSS		**IA**		**AC**		**OTHER SP**	
Walking Distance From Target Population To Organization Locale	0	0%	10	8%	6	4%	3	5%
Change/ development In Neighbourhood May Change Population Demographics, Making Organization Irrelevant To Location And/or Displace Organization	0	0%	0	0%	2	1%	0	0%
SUB-TOTAL RESPONDENTS		61		121		144		59
TOTAL NUMBER OF RESPONDENTS								385

CODE TO DATABASE: Q18c, Page 251

Q19: Will your organization need to move in the coming years?								
	CSS		**IA**		**AC**		**OTHER SP**	
	#	%	#	%	#	%	#	%
Yes, Within The Next Two Years	18	26%	34	25%	48	31%	14	21%
Yes, Within The Next Five Years	7	10%	10	7%	18	11%	8	12%
Yes, In 5 Years Or More	1	1%	8	6%	12	8%	6	9%
No, We Will Not Need To Move	22	32%	23	17%	33	21%	15	23%
Not Sure	21	30%	60	44%	46	29%	23	35%
SUB-TOTAL RESPONDENTS		69		135		157		66
TOTAL NUMBER OF RESPONDENTS								427

CODE TO DATABASE: Q19, Page 251

20a: In a future move, would you consider the following? (Please check all that apply).								
	CSS		**IA**		**AC**		**OTHER SP**	
	#	%	#	%	#	%	#	%
Buying Your Own Space	20	20%	35	17%	58	25%	22	23%
Co-locate With Another Organization	53	54%	80	40%	113	49%	42	45%
Moving Outside The Municipality You Are Currently In	9	9%	26	13%	24	10%	9	10%
Moving Outside Metro Vancouver	3	3%	32	16%	18	8%	5	5%
None Of These	14	14%	28	14%	20	9%	16	17%
SUB-TOTAL RESPONDENTS		99		201		233		94
TOTAL NUMBER OF RESPONDENTS								627

CODE TO DATABASE: 20a, Page 281

20b: Please describe any opportunities or reasons for your answers above. (open-ended question, word coding).								
	CSS		**IA**		**AC**		**OTHER SP**	
	#	%	#	%	#	%	#	%
Proximity To Related Services / Collaborators / Like-minded / Supporters	15	54%	21	33%	43	47%	9	38%
Unaffordable/Rental Or Lease Increases/ funding Constraints	13	46%	38	60%	42	46%	12	50%
Opportunity To Co-locate-share Space	9	32%	13	21%	34	37%	5	21%
Proximity To Target Population/foot Traffic	6	21%	5	8%	8	9%	3	13%
More Space	3	11%	7	11%	11	12%	2	8%
From Renter/Leaser To Owner/Co-Ownership	3	11%	7	11%	17	19%	5	21%

20b: Please describe any opportunities or reasons for your answers above. (open-ended question, word coding).								
	CSS		**IA**		**AC**		**OTHER SP**	
Improved Stability And Security Of Tenure	3	11%	1	2%	14	15%	5	21%
Accessibility	2	7%	2	3%	3	3%	1	4%
Re-locate To A Municipality With A Better Perceived Creative Culture And Supply/inventory Of Suitable Space	2	7%	12	19%	8	9%	1	4%
Building Conditions/ site Maintenance Expenses	2	7%	1	2%	2	2%	1	4%
Poor Building Management/Slum Landlords	1	4%	0	0%	1	1%	1	4%
Opportunity To Move From Residential Home-based To Separate Work Space (commercial, Office, Studio, etc.)	0	0%	3	5%	0	0%	0	0%
Proximity / Access To Supplies Resources	0	0%	2	3%	2	2%	0	0%
Forced Move / Redevelopment Clause Etc.	0	0%	1	2%	6	7%	2	8%
Proximity To Transportation / Transit	0	0%	0	0%	2	2%	2	8%
SUB-TOTAL RESPONDENTS		28		63		91		24
TOTAL NUMBER OF RESPONDENTS								206

21a: Which of the following features would you consider important in a future move? (Please check all that apply).								
	CSS		**IA**		**AC**		**OTHER SP**	
	#	%	#	%	#	%	#	%
More Space	55	80%	102	76%	114	73%	48	74%
Lower Costs	39	57%	105	78%	94	60%	37	57%
Better Location	24	35%	48	36%	55	35%	19	29%
Better Amenities/ Building Features	47	68%	79	59%	96	62%	33	51%
Better Accessibility/ Transportation	31	45%	36	27%	54	35%	19	29%
Tenure Stability	34	49%	56	42%	79	51%	26	40%
Other	19	28%	26	19%	25	16%	13	20%
Not Sure	2	3%	3	2%	7	4%	2	3%
SUB-TOTAL RESPONDENTS		69		134		156		65
TOTAL NUMBER OF RESPONDENTS								424

CODE TO DATABASE: 21a, Page 301

21b: Which one is most important (Please check one).								
	CSS		**IA**		**AC**		**OTHER SP**	
	#	%	#	%	#	%	#	%
More Space	22	32%	34	25%	47	30%	18	28%
Lower Costs	14	20%	62	46%	47	30%	17	27%
Better Location	5	7%	4	3%	3	2%	1	2%
Better Amenities/ Building Features	8	12%	10	7%	19	12%	7	11%
Better Accessibility/ Transportation	4	6%	1	1%	3	2%	3	5%
Tenure Stability	5	7%	6	4%	18	12%	7	11%
Other	9	13%	14	10%	12	8%	9	14%
Not Sure	2	3%	3	2%	7	4%	2	3%
SUB-TOTAL RESPONDENTS		69		134		156		64

21b: Which one is most important (Please check one).				
	CSS	**IA**	**AC**	**OTHER SP**
TOTAL NUMBER OF RESPONDENTS				423

CODE TO DATABASE: 21b, Page 311

PART 4: Affordability

Q26: Approximately what percentage of your annual expenses/operating costs goes towards your lease, rent, mortgage, and other building expenditures such as property taxes and utilities?								
% of Budget Towards Space Costs	**CSS**		**IA**		**AC**		**OTHER SP**	
	#	%	#	%	#	%	#	%
Less than 30%	52	85%	33	27%	83	61%	45	80%
[1]Between 30% and 50%	6	10%	44	36%	24	18%	6	11%
[2]More than 50%	3	5%	45	37%	28	21%	5	9%
SUB-TOTAL RESPONDENTS		61		122		135		56
TOTAL NUMBER OF RESPONDENTS								374
Organizations Paying More than 30% of their Operating Budget on Space Costs (Sum of [1] and [2] above)	9	15%	89	73%	52	39%	11	20%

CODE TO DATABASE: Q26, Page 374

Q28: What challenges does your organization face (if any) in securing an affordable and suitable space(s)? (open-ended question, word coding).								
	CSS		**IA**		**AC**		**OTHER SP**	
	#	%	#	%	#	%	#	%
Affordability/cost Of Space/cost Of Quality Of Space/affordable Well Maintained Buildings	25	54%	58	64%	49	47%	11	32%

Q28: What challenges does your organization face (if any) in securing an affordable and suitable space(s)? (open-ended question, word coding).								
	CSS		**IA**		**AC**		**OTHER SP**	
Funding Limitations/ constraints/unstable Funding/ unpredictable; Secure Financial Support	13	28%	0	0%	21	20%	6	18%
Space Availability/ supply/wait Lists/ competition Amongst Other SP Orgs And Non-profits In Securing Space	7	15%	31	34%	21	20%	3	9%
Adequate Size	7	15%	7	8%	11	10%	8	24%
Building Maintenance Expenses (especially Older Buildings)	5	11%	4	4%	3	3%	0	0%
Real Estate Know-how And Legalities, Navigating Through Finding, Acquiring, Renovating Space	4	9%	0	0%	4	4%	2	6%
Desired Location	4	9%	7	8%	13	12%	6	18%
Accessibility	2	4%	3	3%	3	3%	3	9%
Regulatory Constraints (zoning, Permits, Licensing, Property Taxes)	2	4%	6	7%	13	12%	3	9%
Nimbyism, Discrimination Against Organization, Client Stigma, Community/ neighbourhood Acceptance, Understanding, And Tolerance	0	0%	1	1%	1	1%	2	6%
Project Funding Versus Operating Funding	2	4%	0	0%	4	4%	0	0%
Tenure Security	1	2%	3	3%	0	0%	2	6%

Q28: What challenges does your organization face (if any) in securing an affordable and suitable space(s)? (open-ended question, word coding).								
	CSS		**IA**		**AC**		**OTHER SP**	
Amenities Included, Especially Meeting Space	1	2%	2	2%	2	2%	3	9%
Establishing Relationships, Partners, Collaborators	1	2%	3	3%	2	2%	1	3%
Cannot Sign Long-term Leases, Too Risky For Commitment	1	2%	0	0%	0	0%	0	0%
To Be Affordable, AND Suitable, Near Transit, Accessible, Good Condition, Secure Long-term Tenure, Adequate Size [cannot Be Affordable And Meet These Other Important Criteria]	0	0%	3	3%	3	3%	3	9%
Dependency On Landlords/owners For Investment, Amenities, Fair Pricing	1	2%	5	5%	1	1%	0	0%
Renovation Expenses	1	2%	1	1%	4	4%	2	6%
Location And Safety	0	0%	8	9%	3	3%	1	3%
Staff / Volunteers / Board Dedicating Time/energy To Building/financing/ operating More Than Projects And Programs	0	0%	1	1%	3	3%	0	0%
"How" To Make The Leap: Transition From Home-based To Commercial/office Space; Transition From One Space Typology To The Next	0	0%	1	1%	0	0%	0	0%
Landlord Acceptance/ tolerance	0	0%	0	0%	3	3%	2	6%

Q28: What challenges does your organization face (if any) in securing an affordable and suitable space(s)? (open-ended question, word coding).								
	CSS		**IA**		**AC**		**OTHER SP**	
SUB-TOTAL RESPONDENTS	46		91		105		34	
TOTAL NUMBER OF RESPONDENTS								276

CODE TO DATABASE: Q28, Page 411

Q29: What strategies or approaches is your organization planning to undertake in the coming years to respond to these real estate and space challenges? (open-ended question, word coding).								
	CSS		**IA**		**AC**		**OTHER SP**	
	#	%	#	%	#	%	#	%
Co-location: Explore Opportunities To Establish Relationships/ partners/collaborators To Co-locate/share Space	14	28%	15	16%	27	23%	10	26%
Establish Relationships/ partners/ collaborators/ strategic Relationships (government, Developers, Funders, Like-minded SP Organizations, Real Estate Agents, Venues)	10	20%	12	13%	23	20%	9	23%
Unprepared/no Strategy/waiting/ patience	8	16%	30	32%	17	15%	9	23%
Search For More Suitable And Affordable Space	5	10%	19	20%	12	10%	5	13%
Explore Revenue Generating Activities And Productions I.e. Services Arm, Paid Programs, Diversify/ increase # Of Services, Establish Social Enterprise	4	8%	15	16%	18	16%	4	10%

Q29: What strategies or approaches is your organization planning to undertake in the coming years to respond to these real estate and space challenges? (open-ended question, word coding).								
	CSS		**IA**		**AC**		**OTHER SP**	
Fundraise, Grant Applications, Find Donors, Capital Campaigning, Sponsorship	10	20%	1	1%	26	23%	4	10%
Move From Renter/ leaser To Owner	3	6%	4	4%	4	3%	3	8%
Prepare In-house Or Outsourced Feasibility Studies (real Estate, Building Conditions, Co-location, Design Studies), Business Planning, Space Needs, Assessment, Capital Planning, Strategic Planning	5	10%	0	0%	0	0%	2	5%
Renovate	3	6%	2	2%	2	2%	2	5%
Work With The City To Secure/locate A Suitable Space	7	14%	2	2%	8	7%	2	5%
Learn City Regulations, Policies, Zoning Licensing, Permitting, Legalities, Planning Processes, Etc.	0	0%	2	2%	2	2%	1	3%
Prepare In-house Or Outsourced Feasibility Studies (real Estate, Building Conditions, Co-location, Design Studies) Business Planning, Space Needs Assessment, Capital Planning, Strategic Planning)	5	10%	0	0%	15	13%	0	0%
Redevelop	2	4%	1	1%	0	0%	1	3%

Q29: What strategies or approaches is your organization planning to undertake in the coming years to respond to these real estate and space challenges? (open-ended question, word coding).

	CSS		IA		AC		OTHER SP	
Relocate, Move Out Of The Downtown To Suburbia, Outside Metro Vancouver, Outside Of BC	2	4%	11	12%	9	8%	0	0%
Secure Operating Funding, Not Just Program Funding	1	2%	0	0%	4	3%	0	0%
Mortgaging, Financing	1	2%	0	0%	3	3%	0	0%
Participate In Neighbourhood Planning Processes	0	0%	1	1%	2	2%	0	0%
SUB-TOTAL RESPONDENTS		50		94		115		39
TOTAL NUMBER OF RESPONDENTS								298

CODE TO DATABASE: Q29, Page 431

Q30: Do you have any suggestions for funders or other agencies in terms of how they can assist your organization to achieve affordable, suitable and secure space arrangements? (open-ended question, word coding).

	CSS		IA		AC		OTHER SP	
	#	%	#	%	#	%	#	%
Provide Grants/ funding/subsidies For Operational/rental Needs, Not Just Projects And Programs	14	48%	0	0%	22	35%	5	29%
More Co-location, Community Hub Spaces; Co-project Development	10	34%	15	28%	20	32%	7	41%
Increase Supply Of Subsidized Spaces	4	14%	10	19%	8	13%	3	18%

Q30: Do you have any suggestions for funders or other agencies in terms of how they can assist your organization to achieve affordable, suitable and secure space arrangements? (open-ended question, word coding).								
	CSS		**IA**		**AC**		**OTHER SP**	
Research And Studies Assistance - Funding To SP Organizations To Undertake Feasibility Studies (real Estate, Building Conditions, Co-location, Design Studies) Business Planning, Space Needs Assessment, Capital Planning, Strategic Planning	4	14%	2	4%	7	11%	1	6%
Repurpose Under-utilized Buildings/ vacant Lots For SPRE Use	3	10%	5	9%	7	11%	1	6%
"Rent To Own" For Live/work, Commercial, Office, And Industrial Space For SP Organizations	3	10%	5	9%	3	5%	1	6%
Incentives To Owners For Renting/leasing To SP Organizations	1	3%	3	6%	8	13%	0	0%
Below Market Rate ("non-market") Live/ work, Commercial, Office, And Industrial Space For SP Organizations (similar To Non-market Housing)	1	3%	19	35%	14	23%	2	12%
Flexible Zoning - Lighten Zoning And Other Regulatory Restrictions	2	7%	8	15%	8	13%	0	0%
Multi-year Funding To Match Multi-year Leasing	0	0%	0	0%	2	3%	2	12%
Planning Assistance	1	3%	1	2%	1	2%	2	12%
Procurement Assistance	1	3%	0	0%	2	3%	1	6%

Q30: Do you have any suggestions for funders or other agencies in terms of how they can assist your organization to achieve affordable, suitable and secure space arrangements? (open-ended question, word coding).								
	CSS		**IA**		**AC**		**OTHER SP**	
Provide Grants/ funding/subsidies For SP To Purchase/invest In Property (not Just Lease/rent)	0	0%	11	20%	1	2%	0	0%
Assistance With Multi-party, Multi-collaborator Agreements With Respect To Co-locating Projects	0	0%	2	4%	3	5%	2	12%
Create Special "zones": Enterprise Zones, Cultural Zones	1	3%	4	7%	3	5%	1	6%
Funders To Be The Initiators/facilitators Of Discussions Between Potential Partners/ collaborators/co-locaters	0	0%	0	0%	1	2%	0	0%
SUB-TOTAL RESPONDENTS		29		54		62		17
TOTAL NUMBER OF RESPONDENTS								162

Appendix D

Follow-Up Sample Survey

Appendix D: Follow-Up Sample Survey

Dear Survey Respondents,

Thank you for recently completing our Social Purpose Real Estate survey. We are in the process of analyzing the collected data, and would like to follow-up with you on one specific question relating to the rent you pay.

Upon reviewing the information, it has come to our attention that some respondents may not have had enough information to answer the question accurately. As such, we have provided more information related to this question to clarify your previous answer.

Annual Base Rent: means the rent paid by the tenant (or lessee) to the property owner for use or occupancy of a unit, for a total of 1 year. (Excludes what is often called occupancy costs such as taxes and maintenance fees).

Square Footage: means the area that your organization occupies and uses. Often, your square footage is defined within your rental or lease agreement.

It is useful for us to know your square footage as it allows us to determine the rent you pay on a square footage basis. For example, taking your base rent and dividing it by your square footage gives us a $ per square foot per year figure. This will help us in our study to compare your space costs with the real estate industry as a whole, as the industry norm for understanding space costs and affordability is on a $ per square foot per year basis. With this information, we will learn if you are paying more, the same, or less than other organizations.

QUESTION:

Based on the above information, please provide answers to the following questions:

What is your Annual Base Rent? $_____.

What is your Total Square Footage? _____ square feet.

What is your Rent per Square Foot Per Year? (Calculation: Annual Base Rent divided by Square Footage). $_____/square foot/year.

EXAMPLE:

Annual Base Rent: $10,000.00

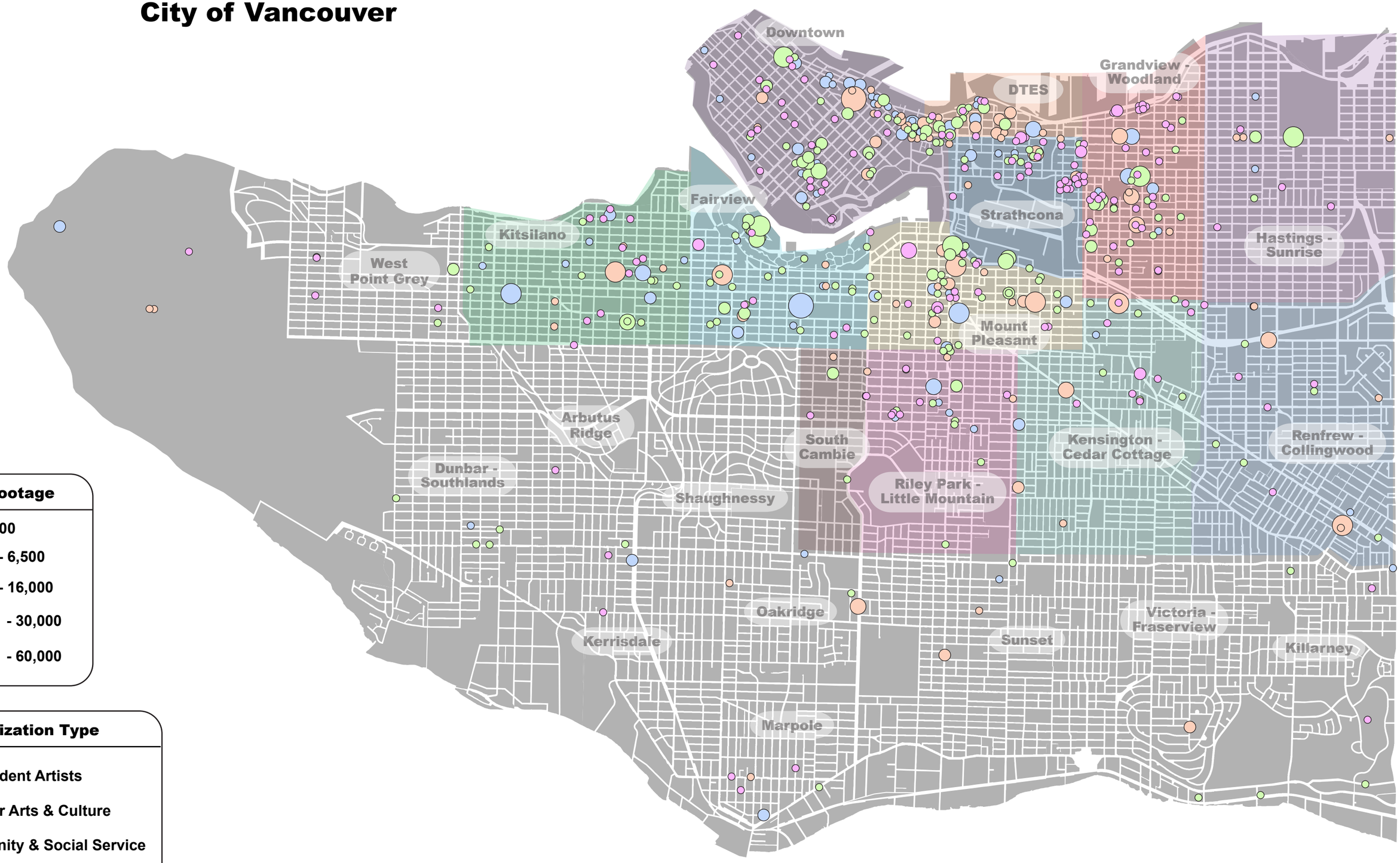
Square Footage: 500 square feet.

Cost per square foot per year: $10,000/500 = $20.00/per square foot/year.

MAPS 1A TO 1H

SP Organizations Current Space Size

Map 1A: SP Organizations Current Space Size
City of Vancouver



Square Footage

- 0 - 1,900
- 1,901 - 6,500
- 6,501 - 16,000
- 16,001 - 30,000
- 30,001 - 60,000

Organization Type

- Independent Artists
- All Other Arts & Culture
- Community & Social Service
- All Other

Map Note: Excluded organizations that aggregated multiple site sizes.

CITY SPACES



Map 1B: SP Organizations Current Space Size Downtown Cluster

Organization Type

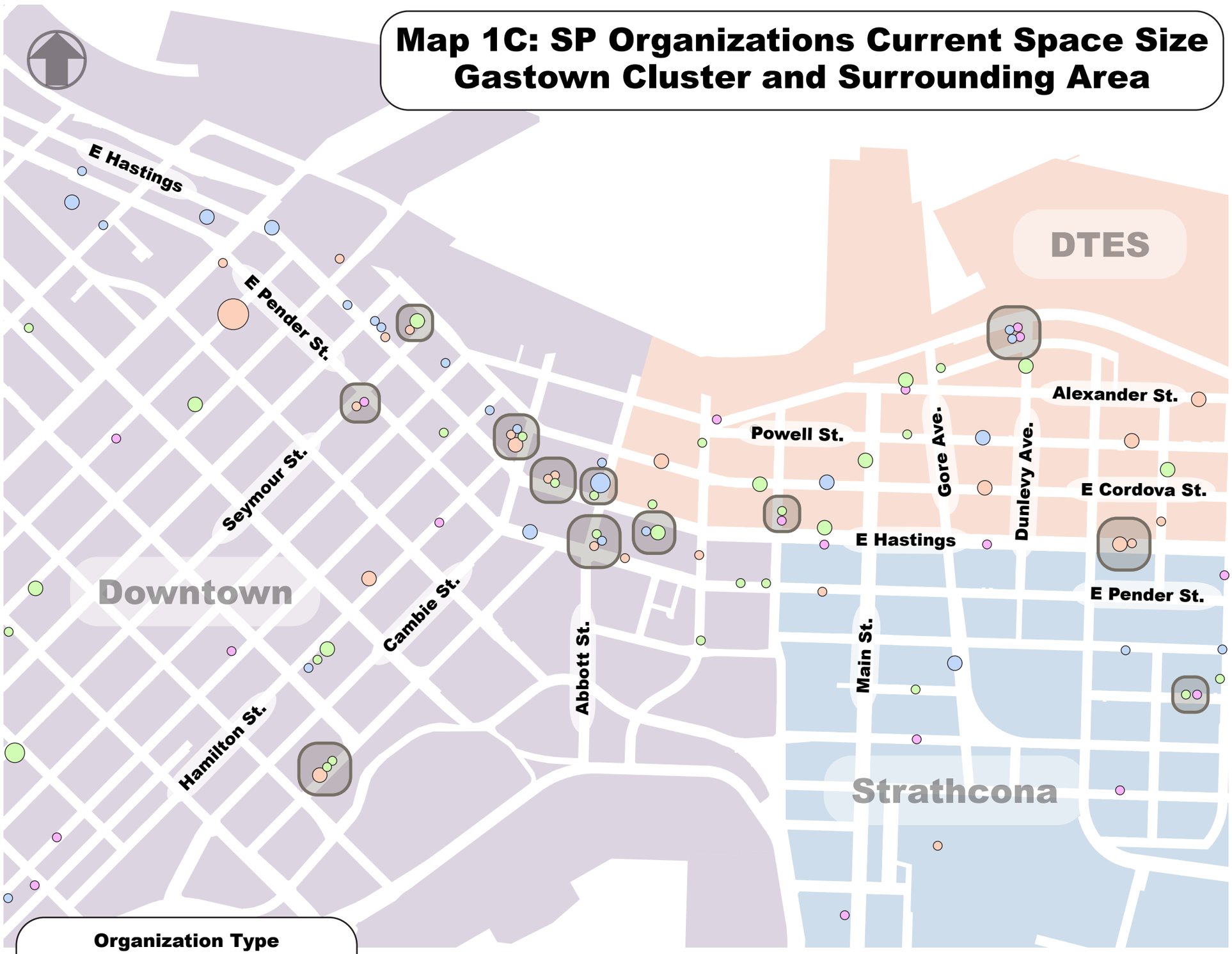
- Independent Artists
- All Other Arts & Culture
- Community & Social Service
- All Other
- Co-located

Square Footage

- 0 - 1,900
- 1,901 - 6,500
- 6,501 - 16,000
- 16,001 - 30,000
- 30,001 - 60,000

CITY SPACES

Map 1C: SP Organizations Current Space Size
Gastown Cluster and Surrounding Area



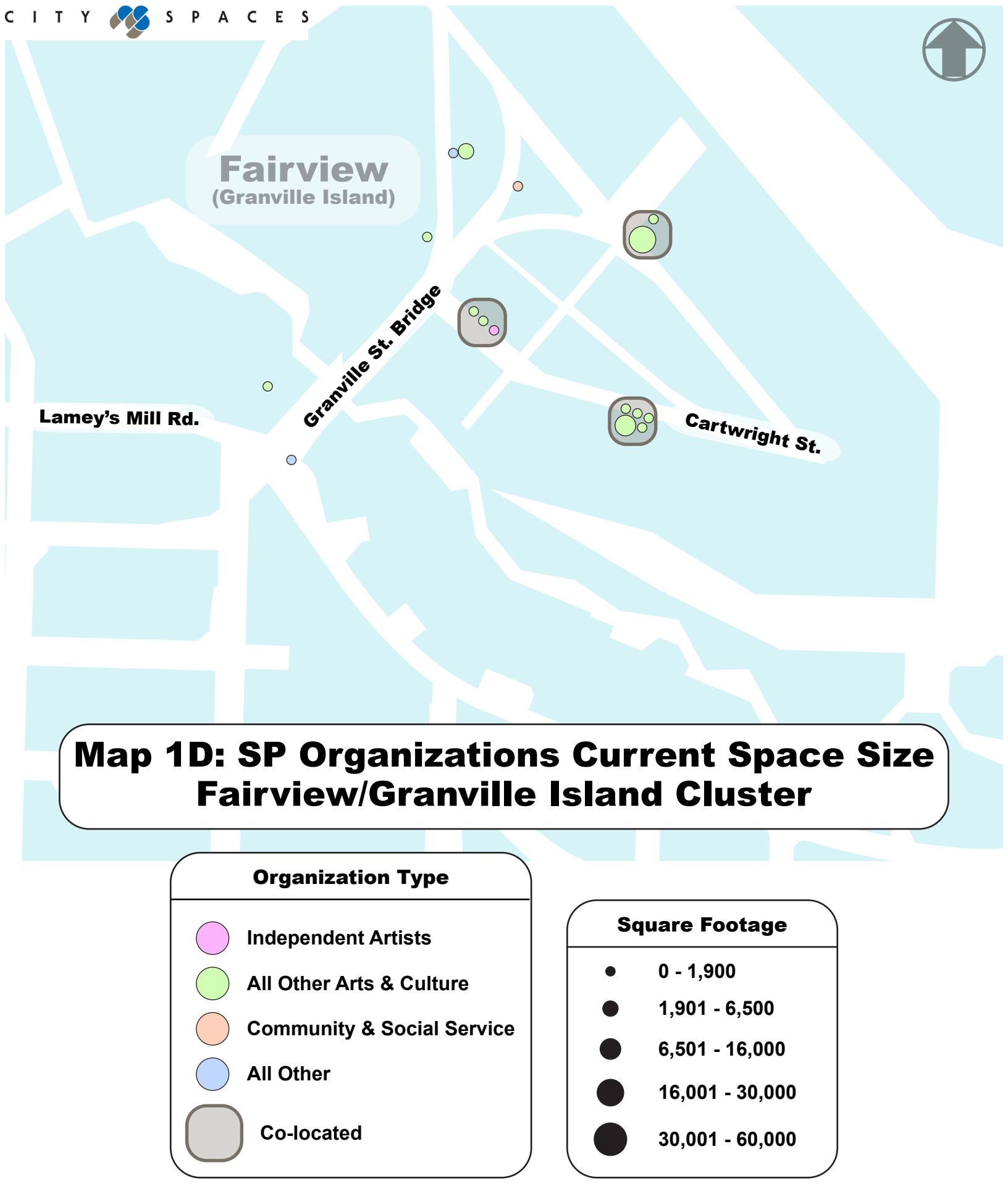
Organization Type

- Independent Artists
- All Other Arts & Culture
- Community & Social Service
- All Other
- Co-located

Square Footage

- 0 - 1,900
- 1,901 - 6,500
- 6,501 - 16,000
- 16,001 - 30,000
- 30,001 - 60,000

CITY SPACES


CITY SPACES
Fairview
(Granville Island)
Granville St. Bridge
Lamey's Mill Rd.
Cartwright St.
Map 1D: SP Organizations Current Space Size
Fairview/Granville Island Cluster
Organization Type
Independent Artists
All Other Arts & Culture
Community & Social Service
All Other
Co-located
Square Footage
0 - 1,900
1,901 - 6,500
6,501 - 16,000
16,001 - 30,000
30,001 - 60,000



Map 1E: SP Organizations Current Space Size Grandview - Woodland Cluster

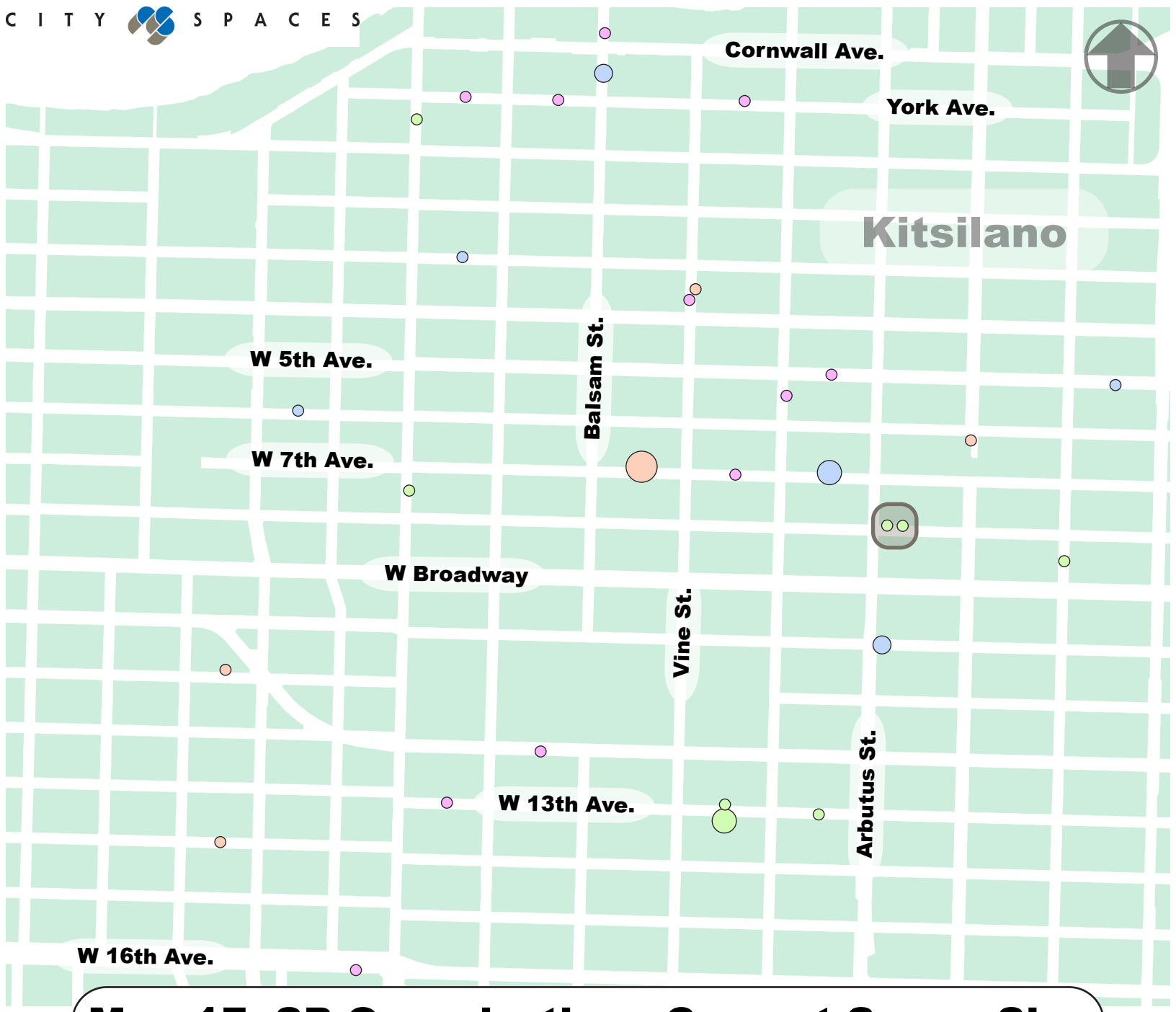
Organization Type

- Independent Artists
- All Other Arts & Culture
- Community & Social Service
- All Other
- Co-located

Square Footage

- 0 - 1,900
- 1,901 - 6,500
- 6,501 - 16,000
- 16,001 - 30,000
- 30,001 - 60,000

Map Note: Excluded organizations that aggregated multiple site sizes.



Map 1F: SP Organizations Current Space Size Kitsilano Cluster

Organization Type

- Independent Artists
- All Other Arts & Culture
- Community & Social Service
- All Other
- Co-located

Square Footage

- 0 - 1,900
- 1,901 - 6,500
- 6,501 - 16,000
- 16,001 - 30,000
- 30,001 - 60,000

Map 1G: SP Organizations Current Space Size
Main Street Cluster

W 3rd Ave.

E 2nd Ave.

W 7th Ave.

E Broadway

W 11th Ave.

Main St.

Kingsway

W 15th Ave.

Quebec St.

Columbia St.

W 20th Ave.

Mount Pleasant

W 23rd Ave.

Organization Type

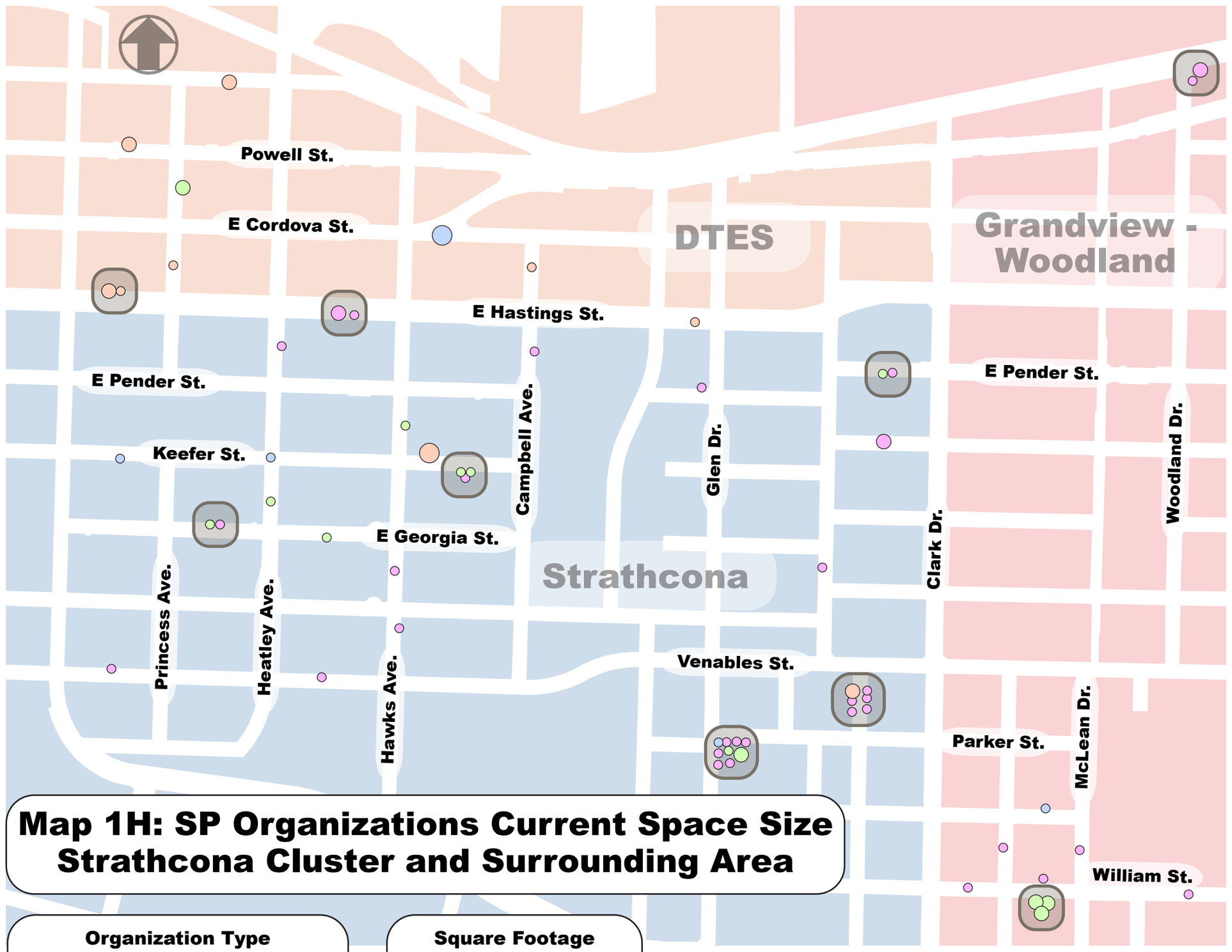
- Independent Artists
- All Other Arts & Culture
- Community & Social Service
- All Other
- Co-located

Square Footage

- 0 - 1,900
- 1,901 - 6,500
- 6,501 - 16,000
- 16,001 - 30,000
- 30,001 - 60,000

Map Note: Excluded organizations that aggregated multiple site sizes.

CITY SPACES



Map 1H: SP Organizations Current Space Size
Strathcona Cluster and Surrounding Area

Organization Type

- Independent Artists
- All Other Arts & Culture
- Community & Social Service
- All Other
- Co-located

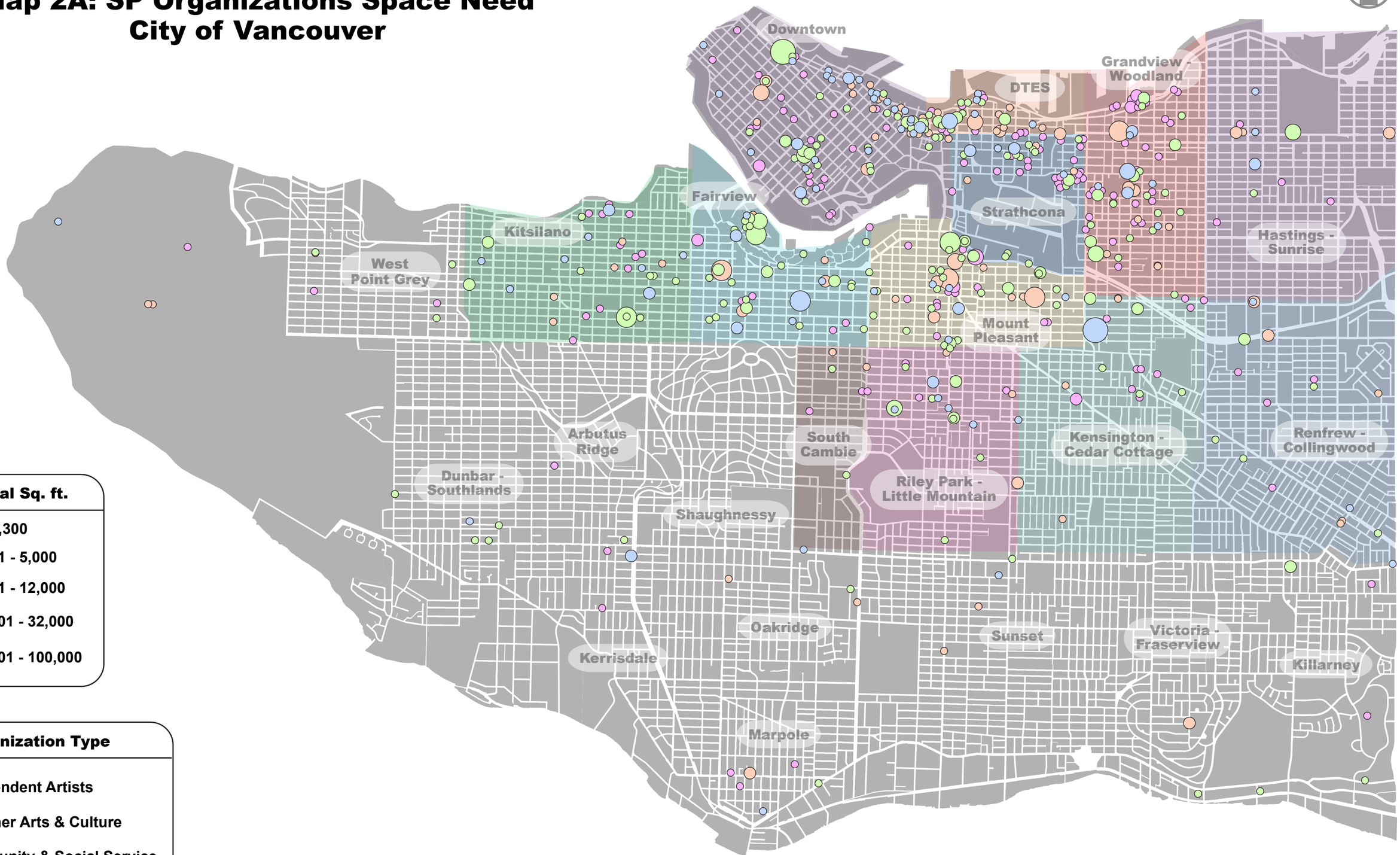
Square Footage

- 0 - 1,900
- 1,901 - 6,500
- 6,501 - 16,000
- 16,001 - 30,000
- 30,001 - 60,000

MAPS 2A TO 2G

SP Organizations Space Needs

Map 2A: SP Organizations Space Need
City of Vancouver



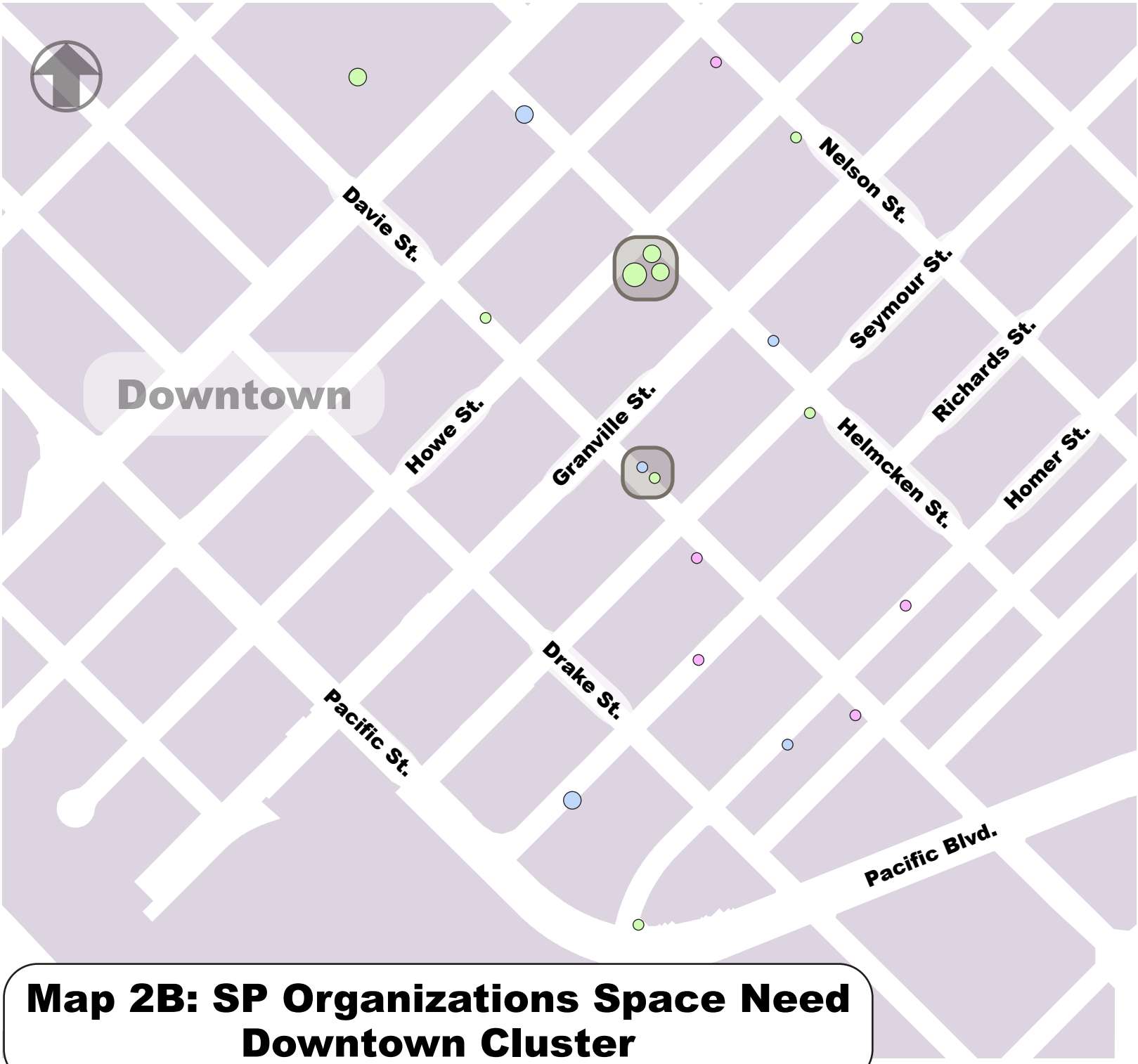
Additional Sq. ft.

- 0 - 1,300
- 1,301 - 5,000
- 5,001 - 12,000
- 12,001 - 32,000
- 32,001 - 100,000

Organization Type

- Independent Artists
- All Other Arts & Culture
- Community & Social Service
- All Other

CITY SPACES



Map 2B: SP Organizations Space Need Downtown Cluster

Organization Type

- Independent Artists
- All Other Arts & Culture
- Community & Social Service
- All Other
- Co-located

Additional Sq. ft.

- 0 - 1,300
- 1,301 - 5,000
- 5,001 - 12,000
- 12,001 - 32,000
- 32,001 - 100,000

CITY SPACES



Map 2C: SP Organizations Space Need DTES Cluster and Surrounding Area

Organization Type

- Independent Artists
- All Other Arts & Culture
- Community & Social Service
- All Other
- Co-located

Additional Sq. ft.

- 0 - 1,300
- 1,301 - 5,000
- 5,001 - 12,000
- 12,001 - 32,000
- 32,001 - 100,000

CITY SPACES



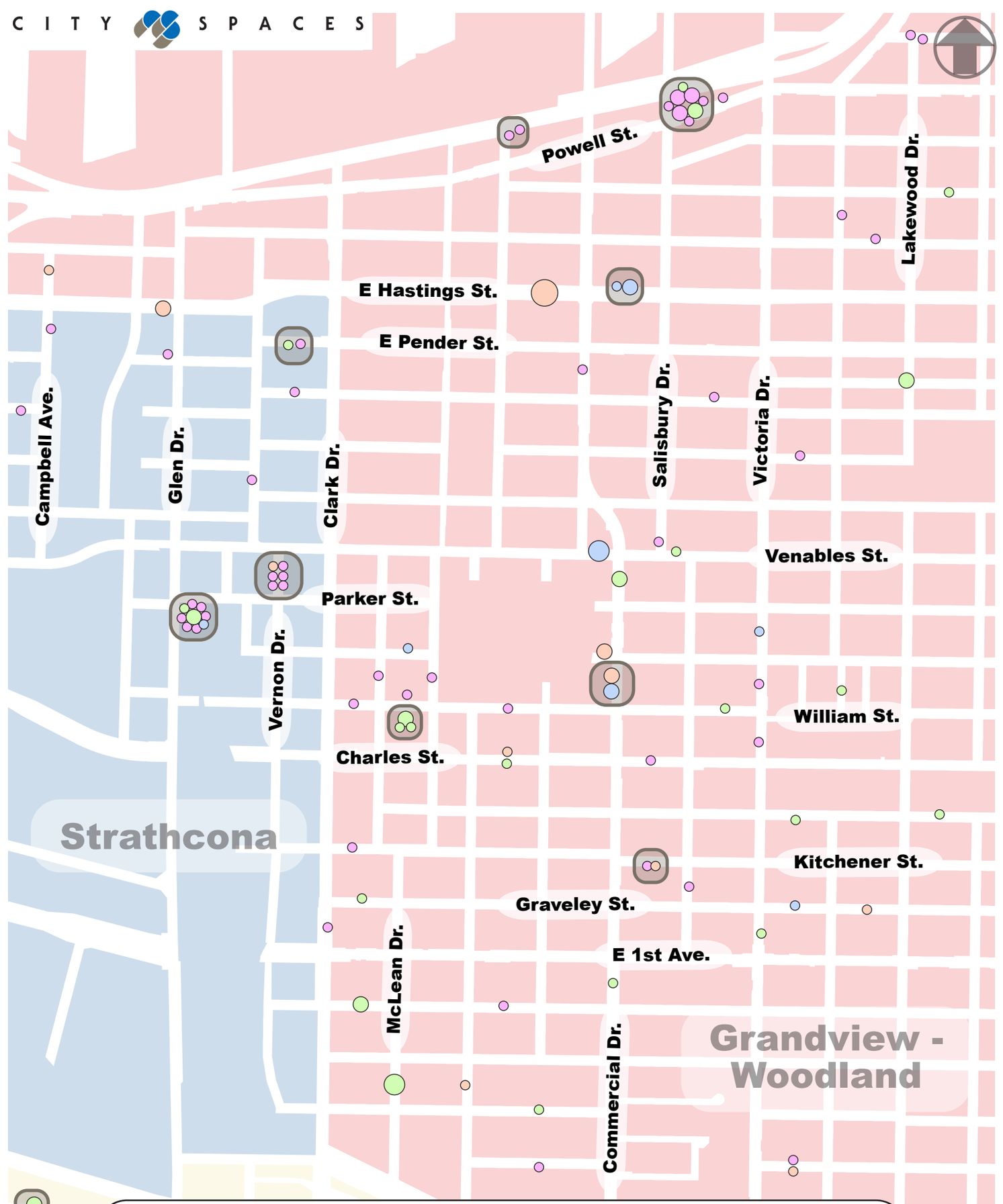
Map 2D: SP Organizations Space Need Fairview/Granville Island Cluster

Organization Type

- Independent Artists
- All Other Arts & Culture
- Community & Social Service
- All Other
- Co-located

Additional Sq. ft.

- 0 - 1,300
- 1,301 - 5,000
- 5,001 - 12,000
- 12,001 - 32,000
- 32,001 - 100,000



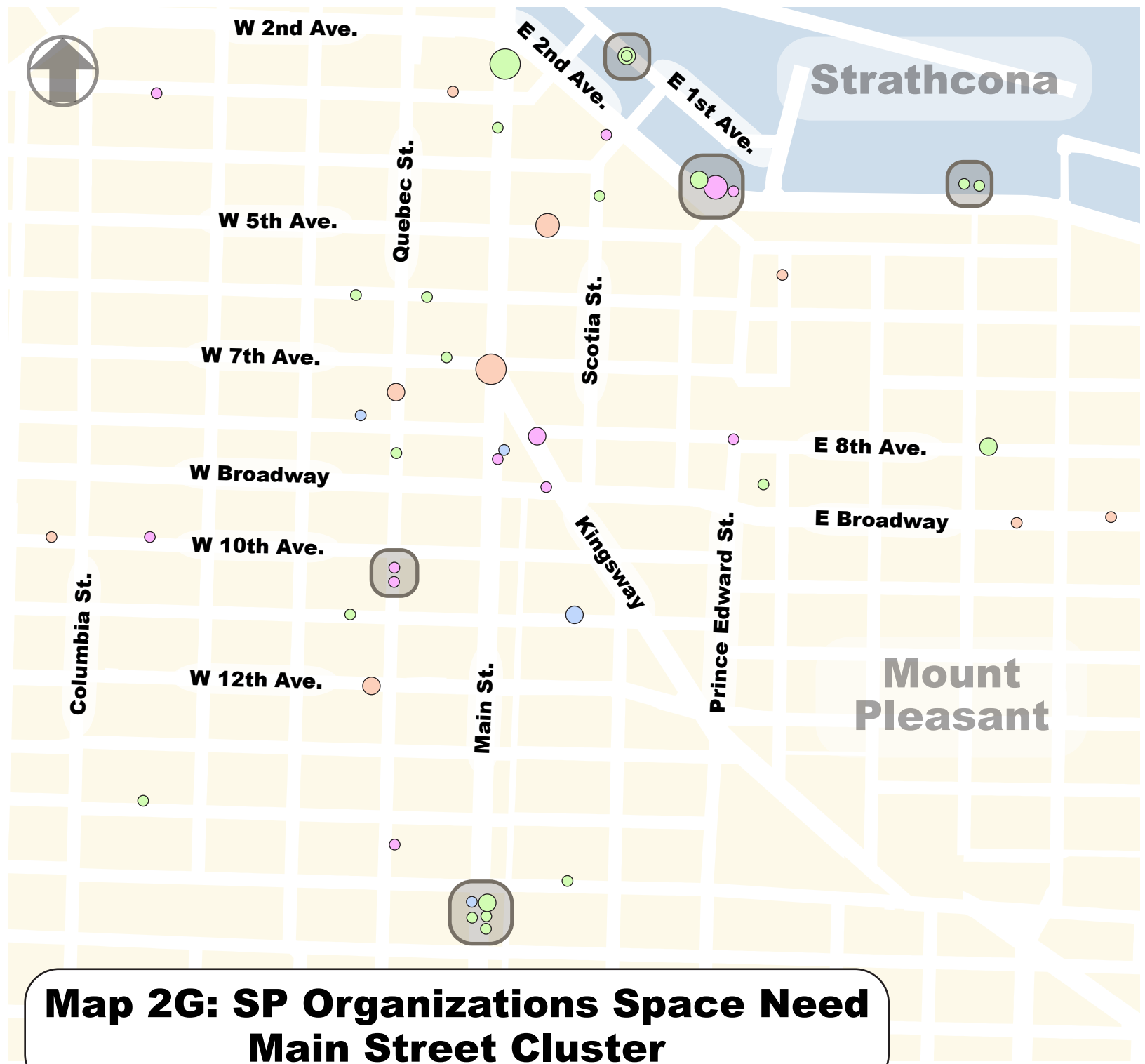
Map 2F: SP Organizations Space Need Grandview Cluster and Surrounding Area

Organization Type

- Independent Artists
- All Other Arts & Culture
- Community & Social Service
- All Other
- Co-located

Additional Sq. ft.

- 0 - 1,300
- 1,301 - 5,000
- 5,001 - 12,000
- 12,001 - 32,000
- 32,001 - 100,000



Map 2G: SP Organizations Space Need
Main Street Cluster

Organization Type

- Independent Artists
- All Other Arts & Culture
- Community & Social Service
- All Other
- Co-located

Additional Sq. ft.

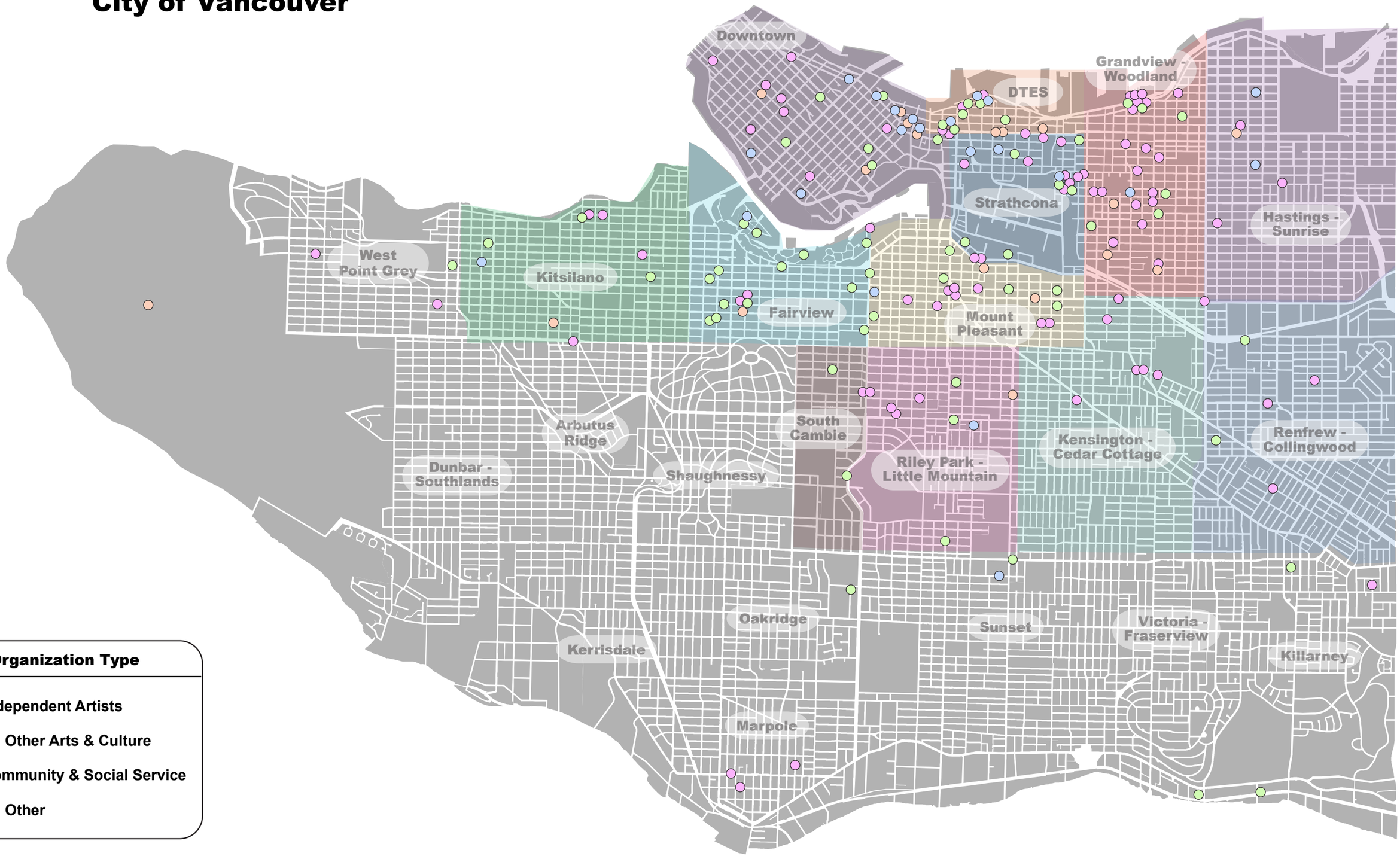
- 0 - 1,300
- 1,301 - 5,000
- 5,001 - 12,000
- 12,001 - 32,000
- 32,001 - 100,000

CITY SPACES

MAPS 3A TO 3E

SP Organizations Tenure

Map 3A: SP Organizations - Rent
City of Vancouver

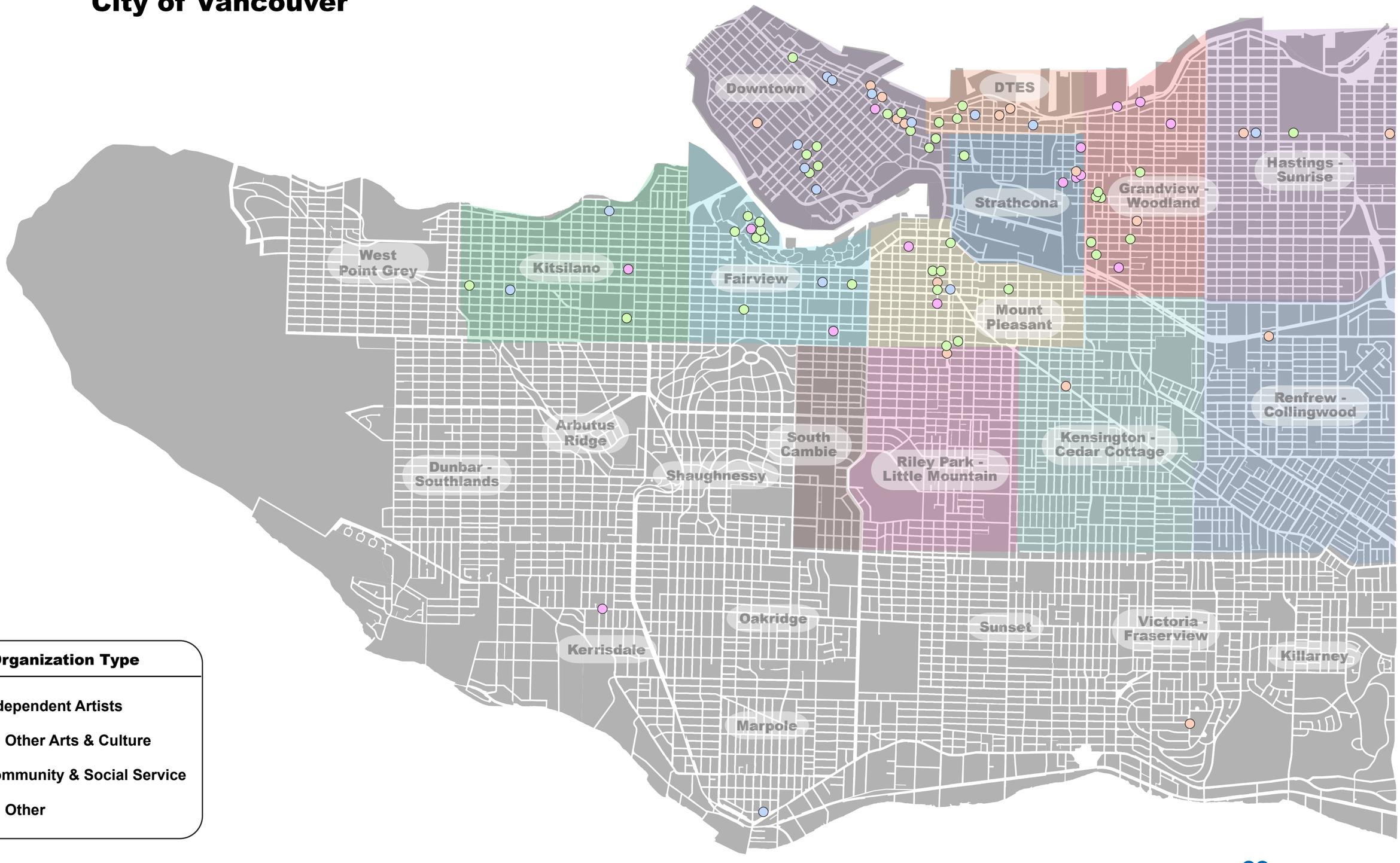


Organization Type

- Independent Artists
- All Other Arts & Culture
- Community & Social Service
- All Other

CITY SPACES

Map 3B: SP Organizations - Lease
City of Vancouver

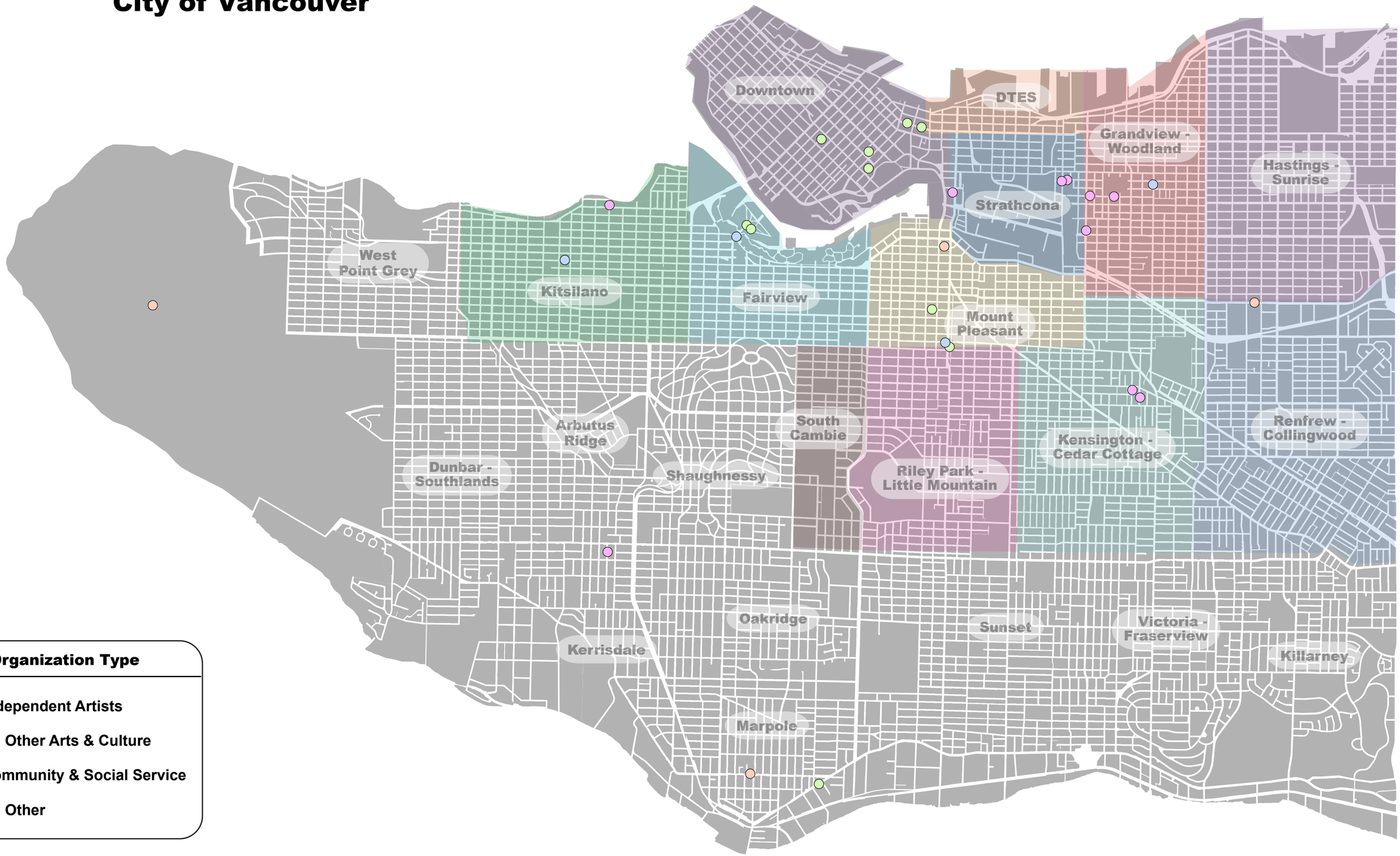


Organization Type

- Independent Artists
- All Other Arts & Culture
- Community & Social Service
- All Other

CITY SPACES

Map 3C: SP Organizations - Sub-Lease
City of Vancouver

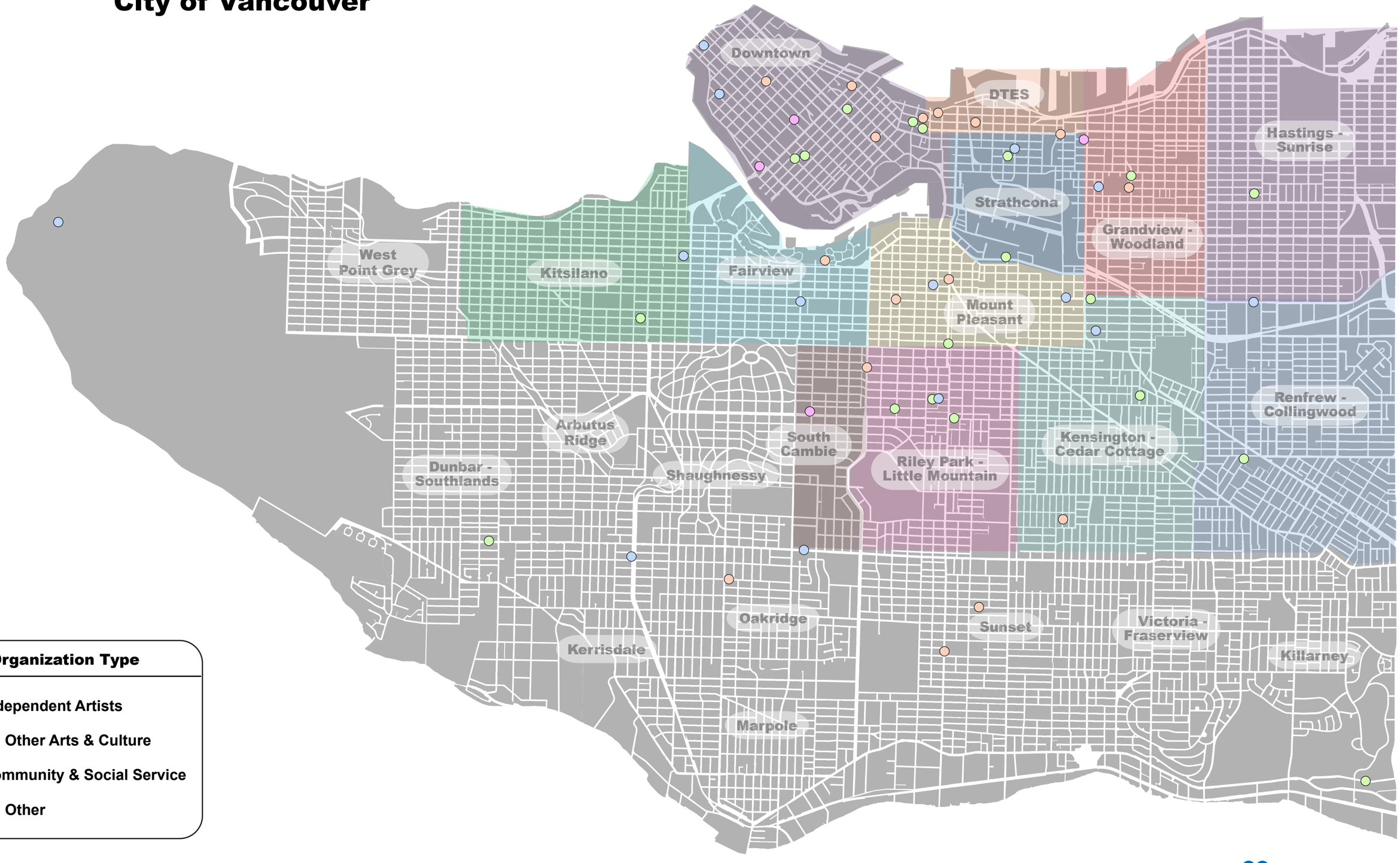


Organization Type

- Independent Artists
- All Other Arts & Culture
- Community & Social Service
- All Other

CITY SPACES

Map 3D: SP Organizations - Subsidized
City of Vancouver

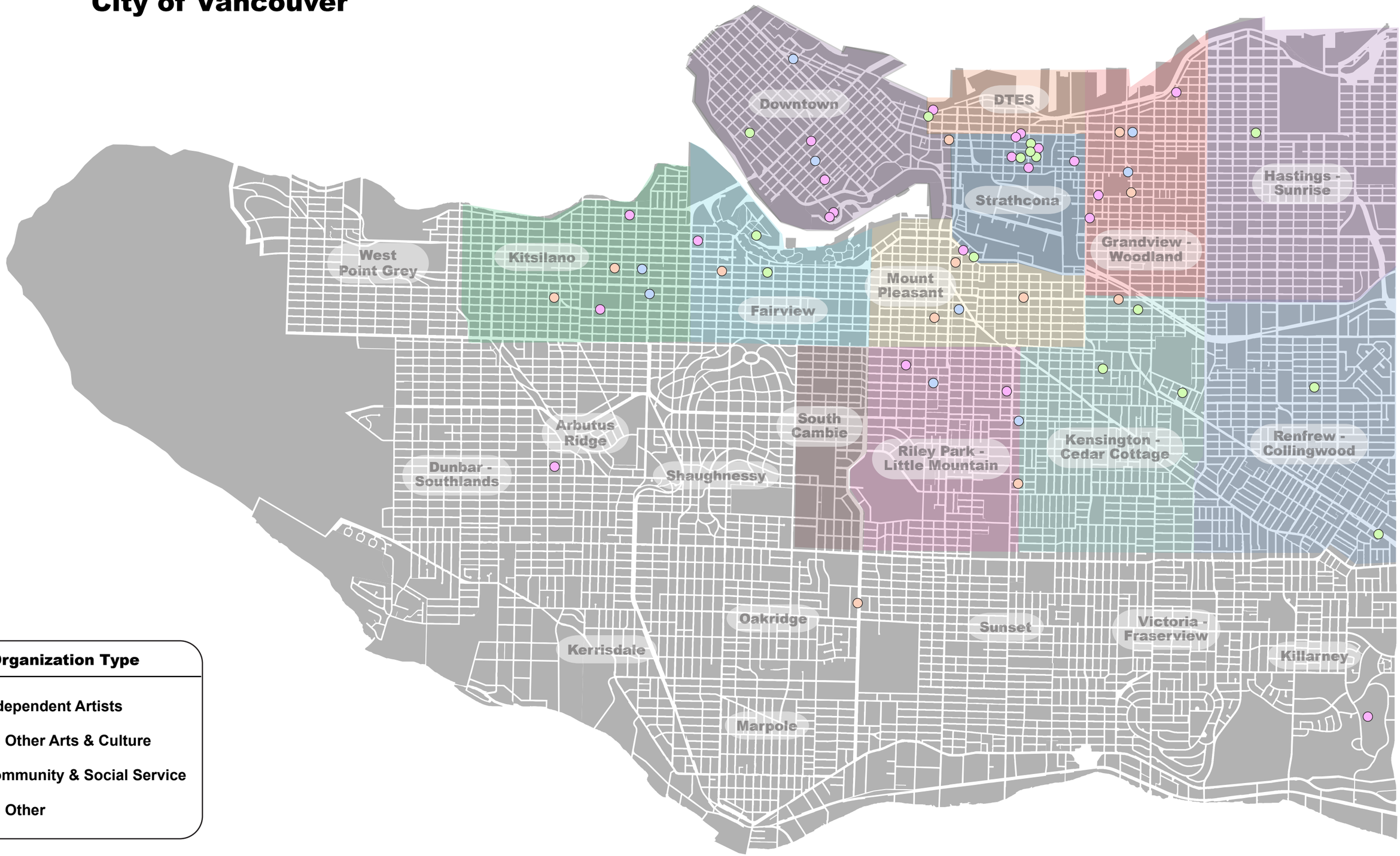


Organization Type

- Independent Artists
- All Other Arts & Culture
- Community & Social Service
- All Other

CITY SPACES

Map 3E: SP Organizations - Own
City of Vancouver



Organization Type

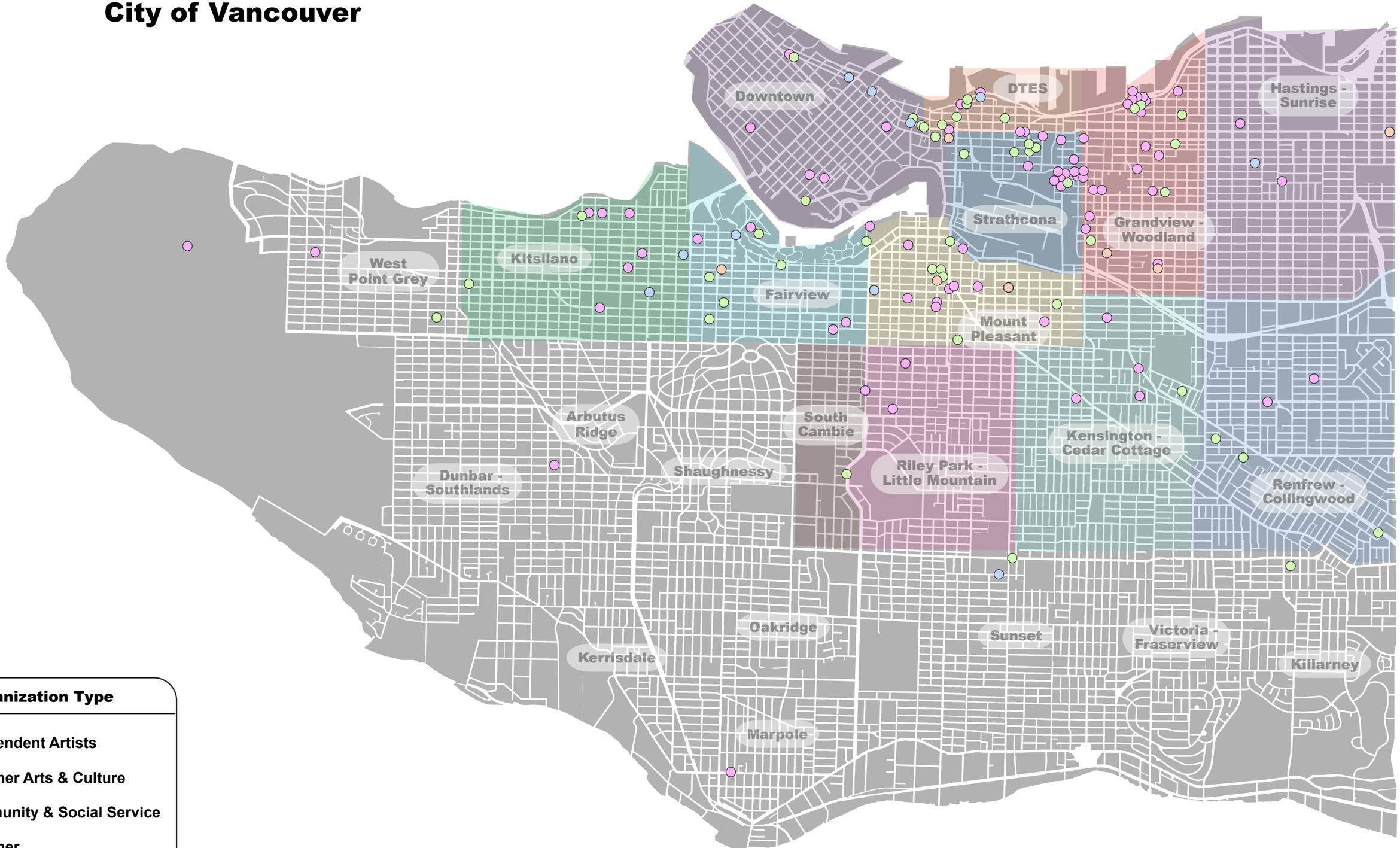
- Independent Artists
- All Other Arts & Culture
- Community & Social Service
- All Other

CITY SPACES

MAPS 4A TO 4D

SP Organizations Affordability

Map 4A: SP Organizations Affordability/ Operating Budget > 30% City of Vancouver



Organization Type

- Independent Artists
- All Other Arts & Culture
- Community & Social Service
- All Other

CITY SPACES

CITY SPACES

Map 4B: SP Organizations Affordability/ Operating Budget > 30% DTES Cluster and Surrounding Area

Organization Type

- Independent Artists
- All Other Arts & Culture
- Community & Social Service
- All Other
- Co-located

Downtown

DTES

Strathcona

W Hastings St.

Hamilton St.

Abbott St.

Carrall St.

Columbia St.

Powell St.

E Cordova St.

Main St.

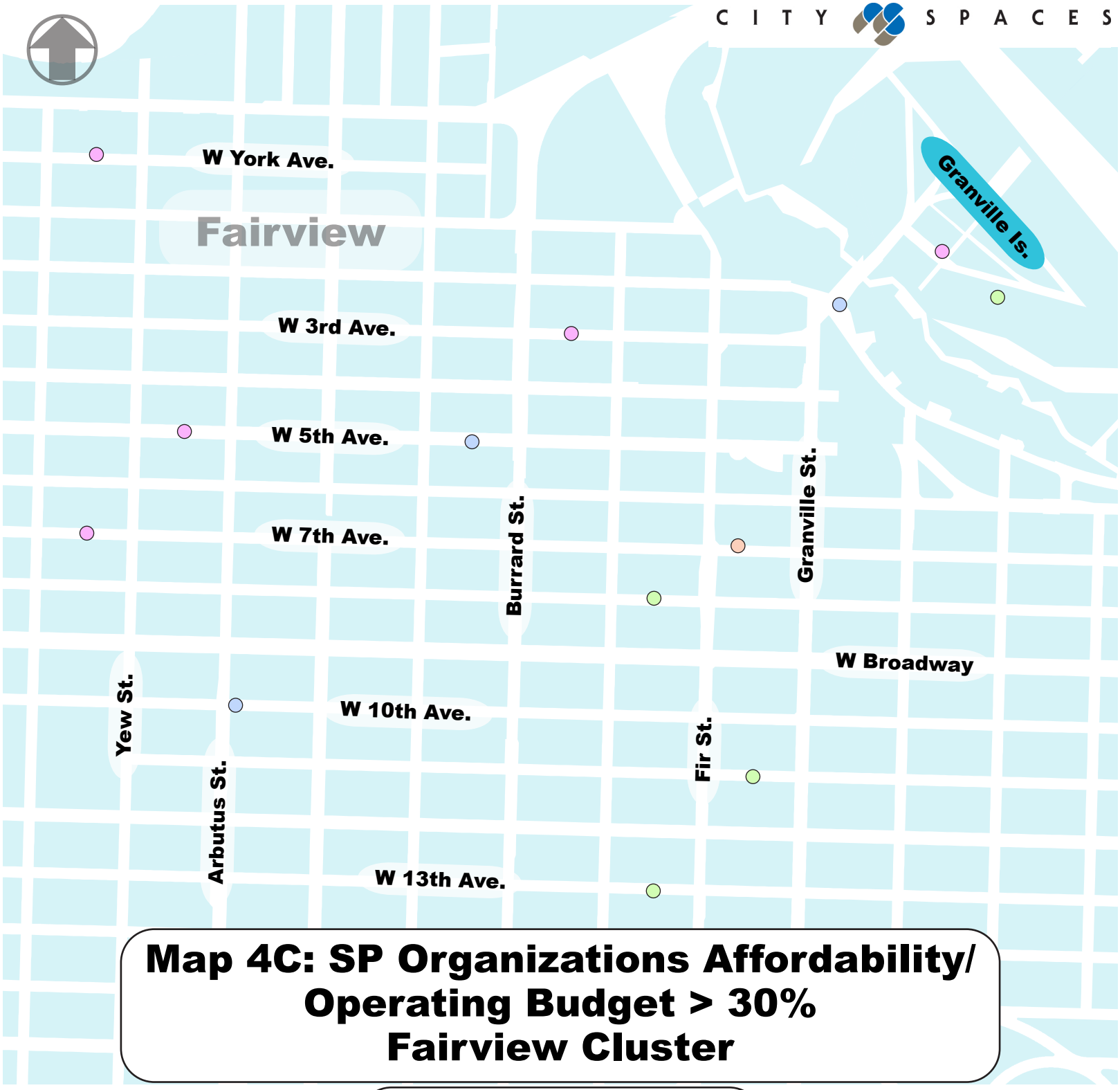
E Hastings St.

Railway St.

Alexander St.

E Pender St.

Keefer St.

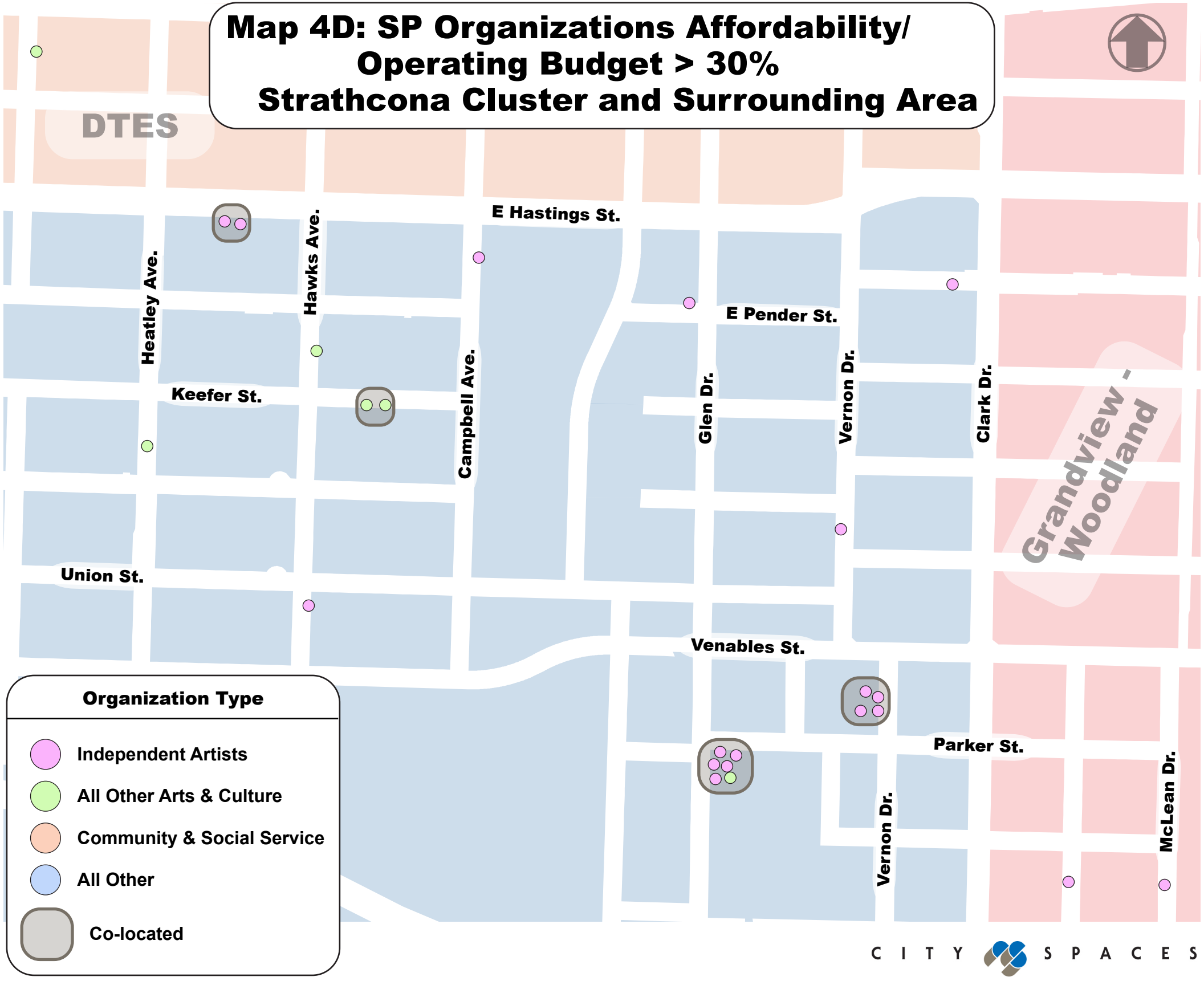


Map 4C: SP Organizations Affordability/ Operating Budget > 30% Fairview Cluster

Organization Type

- Independent Artists
- All Other Arts & Culture
- Community & Social Service
- All Other
- Co-located

Map 4D: SP Organizations Affordability/ Operating Budget > 30% Strathcona Cluster and Surrounding Area

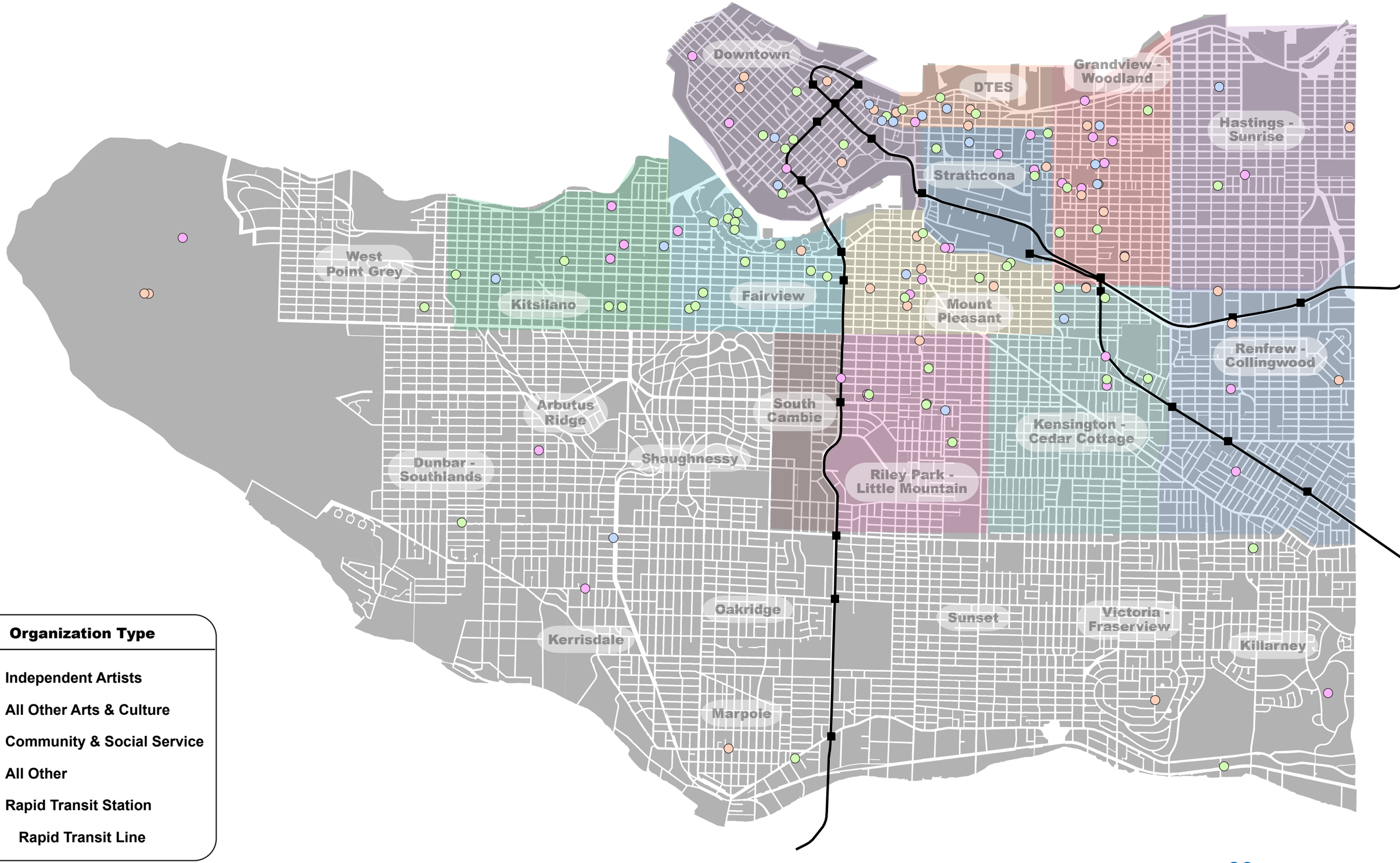


CITY SPACES

MAP 5A

SP Organizations Would Move for Transit

Map 5A: SP Organizations Would Move for Transit



Organization Type

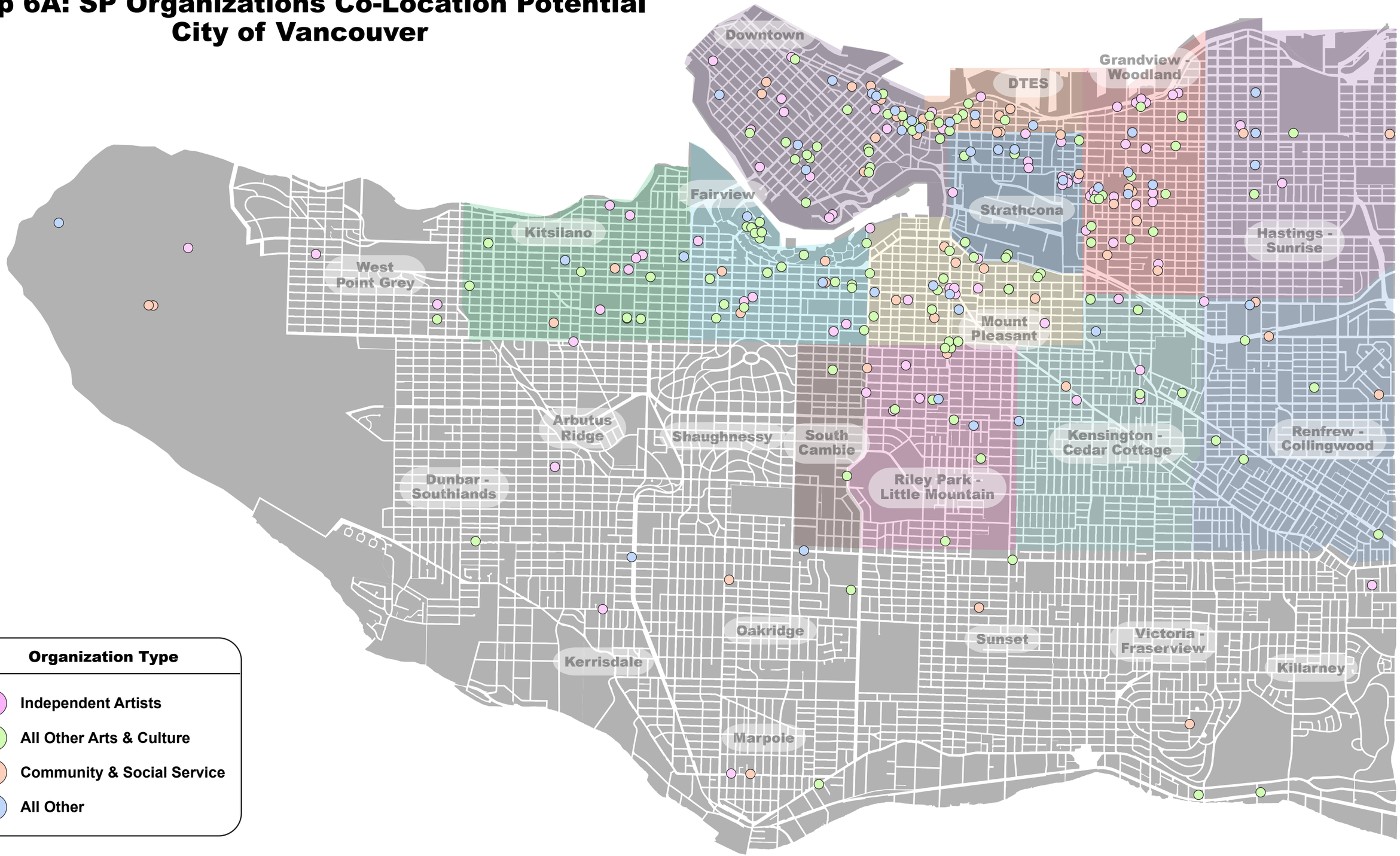
- Independent Artists
- All Other Arts & Culture
- Community & Social Service
- All Other
- Rapid Transit Station
- Rapid Transit Line

CITY SPACES

MAPS 6A TO 6D

SP Organizations Co-Location Potential

Map 6A: SP Organizations Co-Location Potential
City of Vancouver



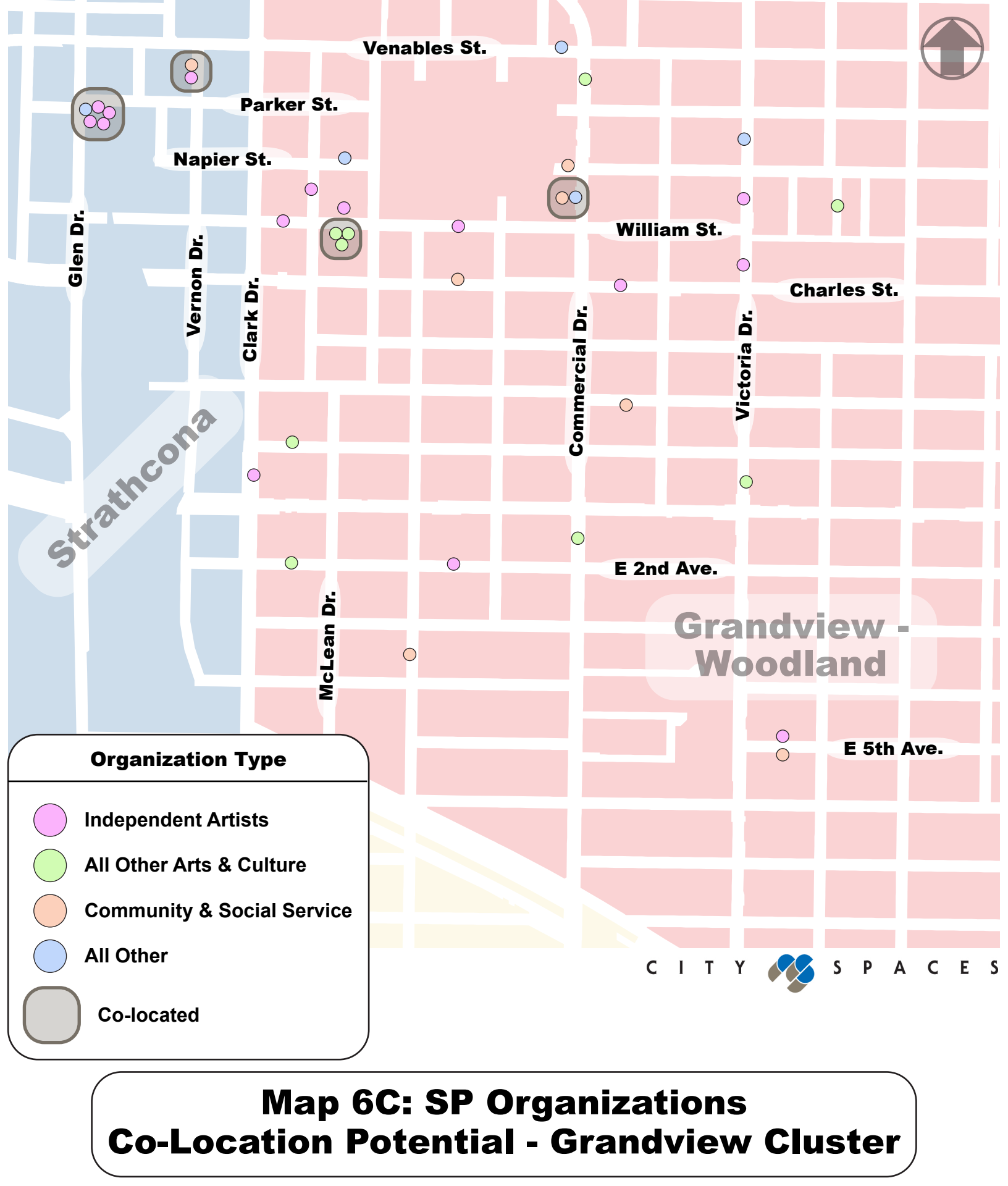
Organization Type

- Independent Artists
- All Other Arts & Culture
- Community & Social Service
- All Other

CITY SPACES

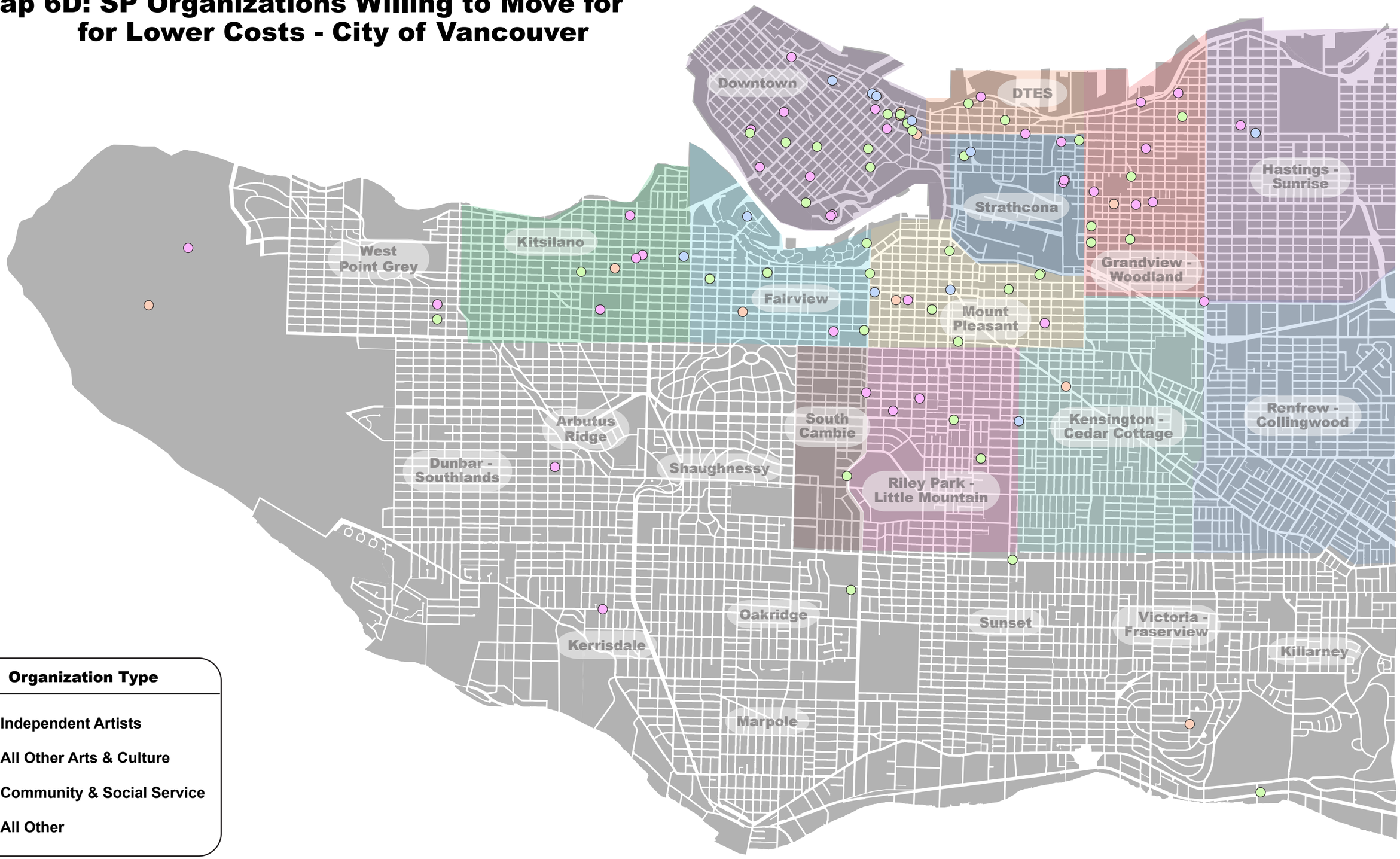


Map 6B: SP Organizations Co-Location Potential
DTES Cluster and Surrounding Area



Map 6C: SP Organizations Co-Location Potential - Grandview Cluster

Map 6D: SP Organizations Willing to Move for for Lower Costs - City of Vancouver



Organization Type

- Independent Artists
- All Other Arts & Culture
- Community & Social Service
- All Other

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5th Floor, 844 Courtney Street, Victoria BC V8W 1C4 | 250.383.0304
Suite 300, 160 Quarry Park Boulevard SE, Calgary AB T2C 3G3 | 403.336.2468

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