

EVENT CENTRE STUDY

PHASE 2

December 19 2016



Completed by:

**BRISBIN
BROOK
BEYNON** ARCHITECTS

CITY OF NANAIMO
THE HARBOUR CITY



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1. INTRODUCTION & BACKGROUND

In early 2016, the City of Nanaimo (the “City”) approved their Strategic Plan Update for 2016-2019 that identified “5 Key Capital Projects (2016-2019)”. One of the identified key capital projects was a Sports and Entertainment Centre.

In August/September 2016, it became known that there may be an opportunity for Nanaimo to secure a Western Hockey League (“WHL”) team. This was important because only two WHL teams have moved to another city in the last 24 years.

Based on the above, in late September, 2016 the City retained BBB Architects “BBB” to research, analyze and report on the following and provide an overview report to Council before the end of October:

On October 24, 2016, BBB presented to council and delivered their report with the primary findings and recommendations being:

1. There definitely is an opportunity for a WHL team to move to Nanaimo. However this opportunity will probably only exist to the end of winter 2017 (at the latest). Again it was emphasized that the opportunity to secure a WHL team has only happened twice in the last 24 years.
2. Nanaimo is one of the best, if not the best market in Western Canada which does not have a WHL team. For that reason, the WHL will commit to finding the required ownership for a new team in Nanaimo.
3. To maximize the opportunity for Nanaimo to secure a team, it must commit to build a new Sports and Entertainment Centre or Nanaimo Event Centre (“NEC”) in the immediate future.
4. If Nanaimo were to build a new NEC, the findings were:
 - The site should be downtown and the 2 recommended sites for further study were 1 Port Drive site (the “1PDS”) and the northwest corner of Comox and Terminal (the Howard Johnson site [“HJS”]).
 - The capacity should be between approximately 5200 and 5700 for hockey and a maximum between 7100 and 8300 for touring shows.
 - The range of the capital cost would be between \$62M and \$83M depending on the options that are selected.

In late October/early November, council agreed to retain BBB to complete a more detailed Phase 2 review based on the findings and recommendations of Phase 1. The contents of the Phase 2 report should respond to Council’s request.

With the additional time available for the Phase 2 study, the following firms were retained:

1. BTY Group for capital cost estimating.
2. Stafford Sports for 10 year projected EC operating business plan.
3. MNP for economic impact analysis.
4. Stadium Consultants International, for overview of sport & entertainment feasibility.
5. 1 Port Drive Site:
 - a. Tetra Tech EBA , Geotech & Environmental
 - b. Bunt & Associates Engineering, Traffic & Parking
 - c. Urban Systems, Services & Road Design
 - d. Millennia Research Ltd, Archeology (prior to Fall 2016)
6. Howard Johnson Site (consultants retained by HJ ownership)
 - a. Watt Consulting Group, Traffic & Parking
 - b. WSP Canada, Geotech
 - c. LSL, Environmental (prior to 2016)

Overview information on these firms is on the following pages.

The consulting team has worked with BBB and other project stakeholders over the last 6-7 weeks. As well, BBB has participated with the City to complete an open public engagement process.





Firm Background

Corporate Profile

BTY is the premier cost and risk advisory for discerning clients who design, bid, build, finance, and operate public and private infrastructure projects. Our team of 120 professionals in 12 offices have been involved in numerous construction projects across North America and emerging markets. We have been supporting our clients with cost and risk management services for over 35 years and have been exposed to virtually every project type in a variety of industry sectors.

Service Delivery

There are two constants our clients rely on when they choose to work with BTY: The quality of the technical due diligence behind our services – and the unstinting commitment our people bring to service delivery that adds value at every stage to optimize project success. A strong culture of innovation and a willingness to go the extra mile in adapting to our clients’ needs has driven BTY’s continuous expansion into new markets with new services.

This combination of quality and commitment enable BTY to build productive and trusted working relationships with long-term clients across the world. This is what sets us apart. It is through these relationships that our people provide knowledge to build with.

Core Services

<p>COST MANAGEMENT</p> <ul style="list-style-type: none"> • Cost Planning & Control • MEP Costing • Scheduling • Claim Management • Change Order Review • Value Management • Post Contract Cost Control • Risk Management 	<p>LENDERS’ SERVICES</p> <ul style="list-style-type: none"> • Pro-forma Review • Schedule Review • Constructability Review • Regulatory Approvals • Progress Claim Report • Lien Act Certification • Payment Certification • Cash Flow • Sales & Marketing
<p>P3 ADVISORY</p> <ul style="list-style-type: none"> • Business Case Development • Shadow Bid Cost Advisory • Independent Certifier • Payment Certifier • Post Completion Monitoring • Life Cycle Costing • Lenders’ Technical Advisor • Operational Modeling • Payment Mechanisms • FM Analysis • Transaction Advisory 	<p>MANAGEMENT CONSULTING</p> <ul style="list-style-type: none"> • Sustainable Design Building • Value Analysis • Program Management • Carbon Neutral Costing • FM Costing • Risk Analysis • Feasibility Studies • Expert Opinion • Research Studies • Project Management

Having worked on large, complex, multi-phase projects with some of North America’s leading consulting firms and major government bodies, we have developed exceptional working relationships with a variety of clients and project teams. It is through this experience and our technical expertise that we distinguish ourselves and constantly improve our services to better serve our clients.

BTY Offices

CANADA

Vancouver | Toronto | Calgary | Edmonton | Saskatoon | Montreal | Ottawa | St. Catharines

UNITED STATES

Los Angeles | Phoenix | Atlanta | Seattle | Cleveland | Orlando | Denver

TURKEY

Ankara



BUNT & ASSOCIATES ENGINEERING LTD.

Corporate Profile

Founded in 1993, Bunt & Associates is one of the largest specialist transportation planning and engineering consulting companies in Western Canada. We have over 50 professional and technical staff in four offices located in Vancouver, Victoria, Calgary, and Edmonton.

Our strengths lie in providing enterprising solutions to urban transportation planning challenges and in assisting our clients in attaining their project goals. Bunt & Associates is a true specialist consultant, providing services related to transportation exclusively. These services include:

- Travel & Parking Demand Forecasting;
- Traffic Operational Analysis & Micro-simulation;
- Traffic & Parking Impact Assessments;
- Site Plan Development;
- Community & Area Planning;
- Conceptual & Functional Design;
- Road Safety Reviews & Audits;
- Travel Demand Management Plans;
- Sustainable Transportation Planning for Transit, Cycling & Walking;
- Policy Reviews;
- Transportation Research;
- Data Collection & Analysis;
- Land Development Approval Support & Public Consultation; and,
- Transportation Expert Witness Services

Our clients range from rural municipalities to major cities, regional agencies, and provincial governments, and from small independent developers to major nation-wide retailers. They include education and healthcare authorities, planning consultants, architects, and design-build contractors. Bunt represents clients from both the private and the public sectors, which gives us unique insight when serving either type of client. As a firm, we pride ourselves on our high percentage of repeat clients who select Bunt & Associates for all their traffic and transportation planning needs.

Bunt & Associates Engineering (BC) Ltd.

Suite 1550 – 1050 West Pender Street, Vancouver, BC V6E 3S7 Tel 604 685 6427 Fax 604 685 6579

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ABOUT MNP

MNP is the fastest growing major chartered accountancy and business advisory firm in Canada. Founded in 1945, MNP has grown to more than 70 offices and 3,000 team members across Canada. In British Columbia, MNP has more than 700 staff located in 19 offices throughout the province. The map below shows our office locations.

MNP provides a wide range of accounting, finance and business advisory services to clients. These include:



- Assurance
- Taxation
- Corporate Finance
- Mergers and Acquisitions
- Enterprise Risk Services
- Forensic Accounting
- Consulting
- Insolvency and Corporate Recovery
- Succession
- Valuations and Litigation Support

About MNP's Economics and Research Practice

Economic and industry studies are carried out by MNP's Economics and Research practice. Based in Vancouver, the Economics and Research practice consists of a team of professionals that has a successful track record of assisting clients with a wide variety of financial and economic impact studies. Our work has encompassed a wide range of programs, industries, company operations and policy initiatives, and has helped clients with decision-making, communication of economic and financial contributions, documentation of the value of initiatives and activities, and development of public policy.

S

Stafford Sports is one of North America's leading advisory firms and provides strategic planning and consulting services for governments, sports franchises and universities. Stafford provides a menu of services that includes development of operating proformas, market feasibility studies, strategic facility planning, facility financing, negotiation of development agreements, architectural design and construction contracts, facility operations agreements and tenant leases. Stafford's Principals have served as development consultants and operating executives for arenas and convention/tourism centers including:

- SaskTel Centre – Saskatoon, SK
- Save-On-Foods Memorial Centre – Victoria, BC
- BC Place – Vancouver, BC
- Canadian National Exhibition – Toronto, ON
- TD Place Arena – Ottawa, ON
- Mosaic Stadium – Regina, SK
- Amway Center – Orlando, FL (NBA Magic)
- AT&T Center – San Antonio, TX (NBA Spurs)
- BB&T Center – Fort Lauderdale, FL (NHL Panthers)
- Minute Maid Park – Houston, TX (MLB Astros)
- Moda Center – Portland, OR (NBA Trail Blazers)
- Prudential Center – Newark, NJ (NHL Devils)
- New Madison Square Garden – New York, NY (NHL Rangers and NBA Knicks)
- Nassau Coliseum – East Hempstead, NY (NHL Islanders)
- Oracle Arena – Oakland, CA (NBA Warriors)
- T-Mobile Arena – Las Vegas, NV (NHL Golden Knights)
- City of Seattle, WA New Arena (Future NHL team)
- American Bank Convention Center and Arena – Corpus Christi, TX
- Atlantic City, NJ Boardwalk Hall Arena
- Atlantic City, NJ Convention Center
- Austin, TX New Arena
- Agganis Arena – Boston, Ma.
- Berry Center Complex – Cypress, TX
- Bon Secours Wellness Arena – Greenville, SC
- Blue Cross Arena – Rochester, NY
- Cedar Park, TX Arena
- Community Choice Credit Union Convention Center – Des Moines, Iowa
- Greensboro, NC Arena and Convention Center
- Hofheinz Pavilion – Houston, TX
- Intrust Bank Arena – Wichita, Kansas
- Iowa Arena – Coralville, IA
- Laredo, TX Energy Arena
- Lawrence Joel Arena – Winston-Salem, NC
- Long Beach, CA Convention and Entertainment Center
- Mobile, AL Civic Center Complex
- Moscone Convention Center – San Francisco, CA
- Pennsylvania Convention Center – Philadelphia, PA
- Peoria, IL Convention Center and Arena
- State Farm Arena – Hidalgo, TX
- TDECU Stadium – Houston, TX
- Wells Fargo Arena – Des Moines, IA
- XL Center Transformation – Hartford, CT



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Corporate Overview



Tetra Tech EBA
 800 employees
 12 offices

Tetra Tech world-wide
 16,000 Employees
 400 offices

Tetra Tech EBA's innovative, sustainable solutions help our clients reach their goals for water, environment, energy, infrastructure, and resource management projects.

A leading provider of consulting, engineering, and technical services

Tetra Tech EBA Inc. (Tetra Tech EBA) is a values-based consulting engineering and sciences company with over 800 employees and 12 offices in Canada. Together with other Tetra Tech companies in Canada, we provide broad and integrated services with more than 3,000 employees in 50 offices across Canada and 16,000 total employees in 400 offices worldwide.

We serve both public and private clients, focusing on the water, energy, environment, infrastructure, resource management, and international development market sectors in Canada and around the world.

We are proud of our reputation for creating and delivering innovative and practical solutions to our clients by listening and understanding their business needs and challenges. Since 1966, Tetra Tech EBA has serviced our clients with the highest quality and integrity, and has completed more than 50,000 projects.

Using Tetra Tech EBA resources and, where appropriate, other Tetra Tech Canadian and global resources, we can develop multidisciplinary project teams to provide you with integrated, cost-effective, and world-class services wherever you need us to work.

Industry-leading experience

Tetra Tech EBA provides specialized services through our six practice areas.

Engineering

- Geotechnical Engineering
- Seismic Liquefaction Assessment
- Slope Stabilization
- Foundation Design
- Construction Monitoring
- Trenchless Technology
- Ground Improvement
- Arctic Engineering
- Earthen Dam Design
- Terrain Evaluation
- Corridor Route Assessment
- Thermal & Numerical Modelling
- Ice Engineering
- Materials Engineering
- Pavements Engineering
- Specialized Laboratory Testing
- Engineering Geophysics
- Rock Engineering
- Geological Mapping & Modelling
- Tunnelling
- Landslide/Debris Flow Evaluation

Environment

- Biophysical Inventory
- Species at Risk Assessment
- Sustainability Management
- Geographic Information Systems (GIS)
- Contaminated Site Assessment
- Human Health/Ecological Risk Assessment
- Environmental Health and Safety
- Environmental Management Systems (EMS)
- Permitting Services
- Environmental Impact Assessments

Transportation

- Roads and Highways
- Airports
- Ports and Harbours
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- Pavement Infrastructure Technologies
- Asset Management / Risk and Reliability
- Resource and Northern Roads
- Roadway Data Collection and Analysis
- Railroads
- Traffic Engineering

Solid Waste Management

- Planning and Permitting
- Sustainability Planning
- Design & Engineering
- Site Investigation/Management (historic sites, proposed sites, landfill gas, and compliance monitoring)
- Construction
- Operations

Mining

- Mine Engineering
- Geologic Resource Modelling and Estimation
- Geochemistry (ARD/ML)
- Environmental Impact Assessments and Permitting
- Closure and Reclamation
- Tailings and Mine Waste Design
- Mine Surface and Groundwater Management

Water

Groundwater

- Groundwater Assessments, Modelling, and Services
- Water Supply Exploration & Development
- Source Water Protection
- Geexchange and Geothermal Studies

Water Resources & Marine

- Integrated Watershed Management
- Dam Safety Reviews & Inundation Mapping
- River & Hydrotechnical Engineering
- Oceanography & Limnology
- Flood Management
- Stormwater Management & Drainage

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- Municipal Engineering
- Industrial Water & Wastewater Systems

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Nanaimo 250.756.2256	Lethbridge 403.329.9009
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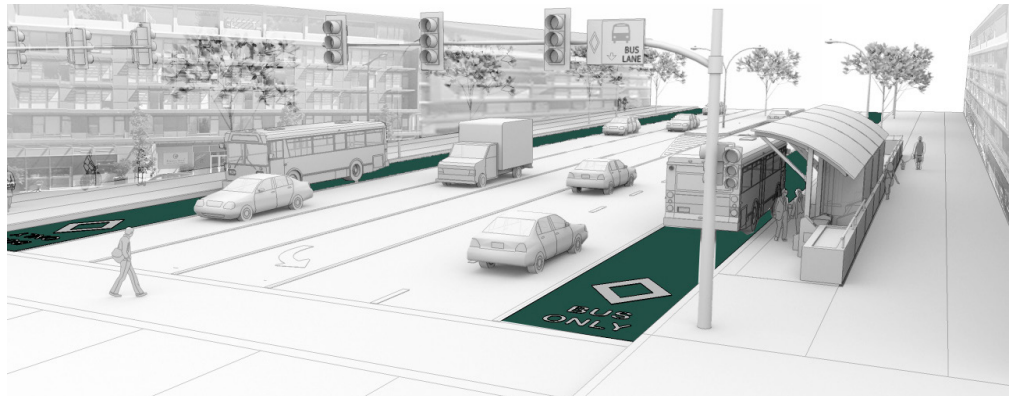
Transportation



Our transportation experts are committed to working closely with all agencies as well as private sector interests.

Our **Transportation Team** can assist you in achieving your goals.

We have established ourselves as one of the leading transportation practices in western Canada. We take a holistic approach that integrates land use planning, urban design, and servicing considerations in developing community and regional transportation infrastructure. We have almost forty years of strategic transportation planning, highway design and design/build experience and have won multiple industry awards for this work. Our transportation team also designs community roads and conducts traffic studies, transit plans, and transportation safety analyses. Urban Systems' active transportation specialists are becoming increasingly renowned for their market leading work related to sustainable modes of transportation including bicycle and pedestrian planning and design. ■



Urban Systems' areas of specialization in Transportation include:

- Active Transportation
- Design
- Design-Build
- Multi-modal Transportation Plans
- Parking
- Safety
- Transit
- Transportation Planning
- Urban Streets



Recent projects

- Livability Accord for High Growth Communities - Cities of Surrey, Coquitlam, Abbotsford and Township of Langley, BC
- Complete Streets and Policy Guide - City of Saskatoon, SK
- Shelbourne Valley Action Plan Transportation Study - District of Saanich, BC
- Highway 97 Realignment and 4-Laning, Winfield to Oyama, BC - BC Ministry of Transportation and Infrastructure
- Integrated Sustainability Plan and Official Community Plan - District of Hudson's Hope, BC
- Cochrane Transit Alternatives Plan - Town of Cochrane, AB
- Transportation Master Plan - City of Spruce Grove, AB

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 Community Planning
 Community Infrastructure

Environment & Energy
 Land Development
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Economic Development
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STRATEGIC PROGRAMMING

Stadium Consultants International, Inc. (SCI), a wholly owned subsidiary of BBB, is a multi-disciplinary consulting firm specializing in the financial, marketing, research, planning, programming, development, financials and implementation of sports and entertainment facilities. Our architectural firm had the foresight 30 years ago to start SCI because we recognized then the link between innovative programming/design and increased revenues and fan experience, when none of our competitors were thinking that way. This still defines the way SCI approaches projects and has always distinguished our DNA from the competition.

We do great design, but equally we understand the critical importance of reducing capital costs and increasing future net revenues. By completing our own guest/fan focus groups, marketing plans, sale of club seating and suite hospitality products, and business plans, we have learned how to better design these buildings. This research has resulted in our unprecedented number of "FIRSTS" - the next great ideas in spectator experience that have improved the bottom line for our Owners. Most of our "FIRSTS" have since been emulated by others.

The collaboration of our facility financial/business experts with a wide array of developers, facility operators, entertainment event producers, sports media experts, teams, etc. is what provides the SCI organization with its uniqueness and strength. SCI's mission is to provide its clients with the most up to date information on financial feasibility and enhancement, strategic planning, programming, budgeting, revenue opportunities and premium hospitality products, for all forms of spectator facilities, especially arenas.

No one understands sports and media better than Gary Green. From being the youngest coach ever in the NHL to one of its most knowledgeable media commentators, Gary has worked for SCI for almost 26 years. His connections throughout professional North American Sport and Media provides SCI with an ability to be ahead of the curve with respect to the next big ideas in our industry.

GARY GREEN - Senior Director

ROLE: SPORTS & ENTERTAINMENT FACILITY CONSULTANT

Gary's experience as an athlete, coach and broadcaster gives him unique insight into what makes a facility a success and what steps are necessary to attract the sports and programming needs of Stakeholders. Gary has been involved in over 100 sports-related projects over the last two decades, and has helped a variety of clients meet their goals through innovative revenue generation models and cost containment strategies. Gary analyzed the interior of Rexall Place to look for commercial leasable space opportunities to support the business model of a 6-pad recreation centre.

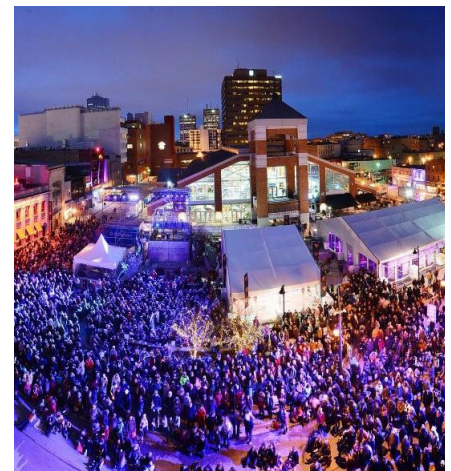
SCI Projects Include:



Madison Square Garden



Rogers K-Rock Centre



Budweiser Gardens



WSP Canada Inc. Company Description

As a Canadian multinational, WSP is one of the world's leading engineering consulting firms. A leader in transforming the built environment and restoring the natural environment, our expertise ranges from engineering iconic buildings to designing sustainable transport networks, to environmental remediation and urban planning, to developing tomorrow's energy sources and finding innovative ways to extract essential resources.

Working with governments, businesses, architects and planners, we provide integrated solutions for all of the markets in which we operate. With 8,300 dedicated professionals in Canada, supported by a worldwide network spanning 40 countries, our teams are committed to helping our clients succeed no matter how they grow, what they choose to do, or where they move.

WATT CONSULTING GROUP

MILLENIA RESEARCH

LSL

2. WHAT ARE EVENT CENTRES

Event Centres, often referred to as interior multi-purpose sports and entertainment spectator arenas, are major public assembly facilities that attract people of all ages, social backgrounds and interests.

From Sesame Street for 3 year olds to Barry Manilow for 93 year olds; from Wrestling to Classical Music; from WHL Hockey to Elton John; from Lacrosse to Diana Krall and Michael Buble; from Disney on Ice to Hip Hop; from Country and Western to Cirque du Soleil; and from Tractor Pulls to Figure Skating Championships, the contrast and variety of events is endless. As well, the list extends to community and cultural celebrations and religious speakers like Joel Olsteen to motivational speakers such as Oprah and Tony Robbins.

Since these facilities will be sustainable for 50 years, the events that will appear in them will change with what society wants.

With respect to sports, as soccer and basketball have attained rapid growth in Canada over the last 10 years, junior and minor professional leagues in these sports are already gaining interest and may well become significant spectator sports for mid size spectator facilities in the near future. Indoor cricket, handball, championship ping pong and badminton are all events that draw major attention in some cultures and occur in spectator venues.

With respect to entertainment, these facilities continue to attract an ever-changing array of events including bigger and more exciting family shows and concerts to equestrian shows, motocross and gymnastic touring shows. As well, they have proven to be excellent venues to accommodate educational and business events and activities that otherwise would have no facility in which to meet. Of equal importance, these are ideal facilities to provide venues for art and cultural events and festivals such as art shows and amateur music competitions usually coordinated and led by the main art and culture institutions and facilities in the region.

And in many communities, they also provide warm interior space for residents (especially seniors) to use in inclement weather, be that with a quarter mile walking track with great views or indoor function rooms and cafes for informal meetings and gatherings.

Event centres host events and gatherings that are of interest to all residents is the reason that these facilities are referred to as the #1 Community Centre in any urban area. They are recognized as having at least 1 event a year that every man, woman and child within the city and region, would want to attend.

In summary, Event Centres bring communities together. They are our largest interior public venues in which to meet face to face. It is only appropriate that the City of Nanaimo, which means "Gathering Place" is considering a new magnificent Event Centre.

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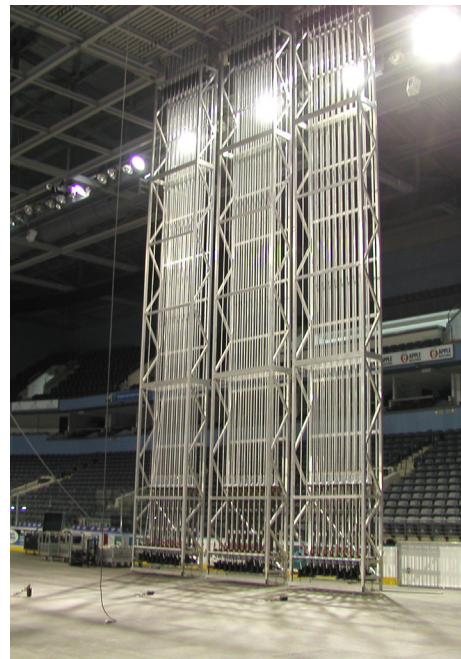
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EVENT FLOOR

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EVENT FLOOR

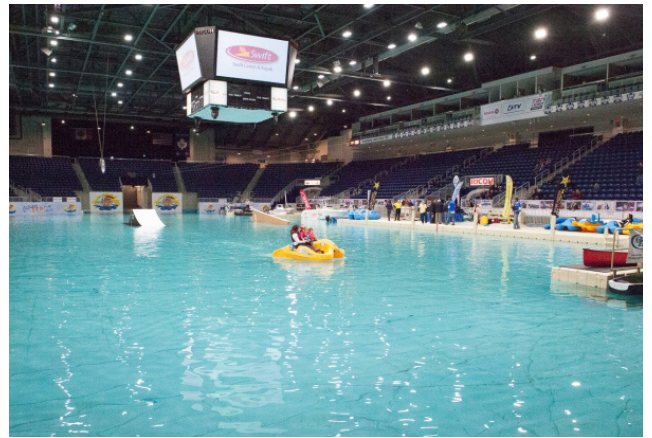
Art Shows, Craft Fairs, Home Shows, Pow Wows, Food Expos.



CONCOURSES Walking Programs



WATER Boat Shows



ICE Hockey, Figure Skating, Curling, Sledge Hockey, Community Skating, Synchronized Skating, On Ice Theatre.



GRASS

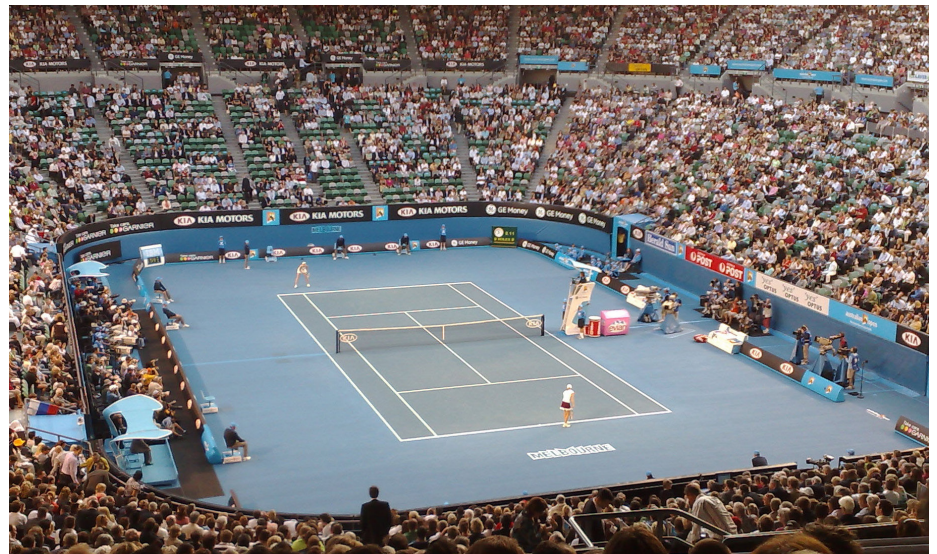
Football, Soccer, Cricket, Lacrosse, Field Hockey



DIRT Equestrian, Motorsports, Rodeo



COURT Basketball, Handball, Badminton, Wrestling, Tennis, Volleyball



3. NANAIMO MARKET

The following demographic information is based on the attached “Central-North Vancouver Island Demographics” prepared by Nanaimo Economic Development dated September 12, 2016 and based on the BC Stats database.

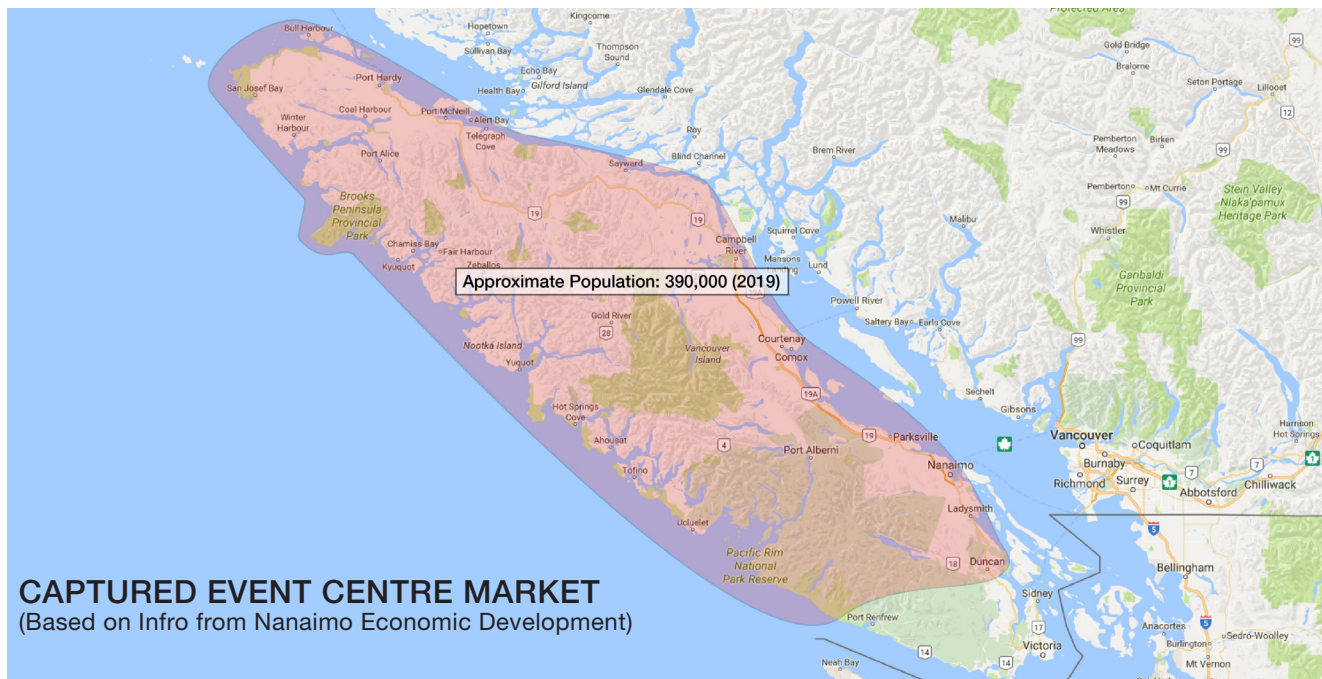
Nanaimo’s contiguous primary trade area (especially with respect to attendance at EC events) is the Nanaimo Regional District (including Ladysmith) and has a 2015 population of approximately 163,000. The population of this area grew by 1.55% between 2014 and 2015 and continues to grow. Growing at the same rate this area has an approximate present population of 165,000 and in 2019 (when the EC is projected to open) an approximate population of 173,000. The approximate travel distance and time in this district to downtown is approximately 25 minutes.

Nanaimo’s secondary trade area is within approximately a 70 minute travel time that includes Comox RD, Strathcona RD and Alberni-Clayoquot RD. It had an additional population of approximately 140,000 in 2015.

Most of Nanaimo’s third trade area is within approximately a 100+ minute travel time and includes other areas to the north and northwest. This has an additional population of approximately 70,000.

The above does not include the Victoria RD and adjacent areas that are closer to downtown Victoria (where their Event Centre is) than downtown Nanaimo, even though the natural dividing line is further south at Malahat, especially between October and April. These areas have a population in excess of 350,000.

The relatively unique characteristic of the areas within half the travel time to Victoria and a 2 hour travel time to the north and north-west of Nanaimo is that they represent a “captured” population of approximately 373,000 today or 390,000 in 2019. This is a result of being the northern part of an island where there is considerable additional time and/or cost to travel to attractions that are on the mainland or in Victoria.



In contrast, using a similar criteria, Kelowna's "captured market" is approximately 275,000. This is due to competing event facilities in Penticton and Kamloops. Red Deer's is approximately 250,000 with competing facilities in Calgary and Edmonton.

A second characteristic of Vancouver Island is that people both expect to and to a certain degree are used to traveling longer distances and for most of these people, Nanaimo is their event and urban centre.

A third characteristic is that Vancouver Island is seen as a relatively unique destination especially for tourists and vacationers to explore.

The above three (3) characteristics are apparent in Nanaimo's Port Theater ticket sales where approximately 10% are to households off Vancouver Island and 20% are to households on Vancouver Island but are outside the Nanaimo RD (including 7% to Victoria residents). Thank you to the Port Theatre that provided the basis for this information.

This is also no doubt a result of Nanaimo's central location with convenient access to ferries to the mainland.

An important issue is that the Port Theatre has a capacity of 800 while a new Event Centre with its much larger capacity will be hosting bigger events with generally larger marketing budgets. For this reason, it is reasonable to assume that a new Event Centre could attract 35% or more of its guests from outside the Nanaimo RD. Obviously this bodes well for the positive impact of this facility to Nanaimo's economy which will be discussed in a subsequent section.

Another key attribute of the Nanaimo RD is the diversification and strength of its business community. There are approximately 600 businesses with over 19 employees with the vast majority being within the City of Nanaimo or the immediate vicinity. This should result in strong event ticket sales, especially for premium seating products like private suites and loges and for the sale of corporate sponsorships. All of these sales will support the financial well being of the Event Centre and a WHL Team. As well, the anticipated continued (and quite possibly accelerated) growth of the Nanaimo super-region will only add to businesses' demand for quality entertainment.

Central-North Vancouver Island Demographics

September 12, 2016

POPULATION by Area

	Area Type	2011	2012	2013	2014	2015
Alberni-Clayoquot	RD	31,581	30,979	30,570	30,627	30,106
Port Alberni	CY	17,934	17,284	16,744	16,554	16,149
Tofino	DM	2,019	2,001	2,040	2,064	2,053
Ucluelet	DM	1,660	1,616	1,608	1,595	1,515
UA	RDR	9,968	10,078	10,178	10,414	10,389
Strathcona	RD	43,928	42,723	43,924	44,618	45,448
Campbell River	CY	31,736	31,672	31,948	32,517	33,395
Gold River	VL	1,277	1,249	1,249	1,256	1,242
Sayward	VL	319	313	309	308	307
Tahsis	VL	314	315	311	309	303
Zeballos	VL	126	118	117	110	101
UA	RDR	10,156	10,056	9,990	10,118	10,100
Comox	RD	64,417	64,048	63,943	64,247	64,634
Comox	T	13,785	13,558	13,604	13,754	13,986
Courtenay	CY	24,596	24,563	24,451	24,639	25,244
Cumberland	VL	3,436	3,458	3,478	3,492	3,506
UA	RDR	22,600	22,469	22,410	22,362	21,898
Cowichan Valley	RD	81,485	81,191	81,366	82,235	82,787
Duncan	CY	4,962	4,939	4,790	4,761	4,663
Ladysmith	T	7,992	8,071	8,154	8,266	8,177
Lake Cowichan	T	3,003	3,054	3,063	3,107	3,114
North Cowichan	DM	29,401	29,232	29,291	29,704	29,999
UA	RDR	36,127	35,895	36,068	36,397	36,834
Nanaimo	RD	148,770	148,933	150,057	151,995	154,572
Lantzville	DM	3,624	3,648	3,493	3,489	3,389
Nanaimo	CY	85,786	85,751	86,927	88,405	90,524
Parksville	CY	12,002	12,019	12,138	12,230	12,598
Qualicum Beach	T	8,663	8,584	8,531	8,503	8,940
UA	RDR	38,695	38,931	38,968	39,368	39,121

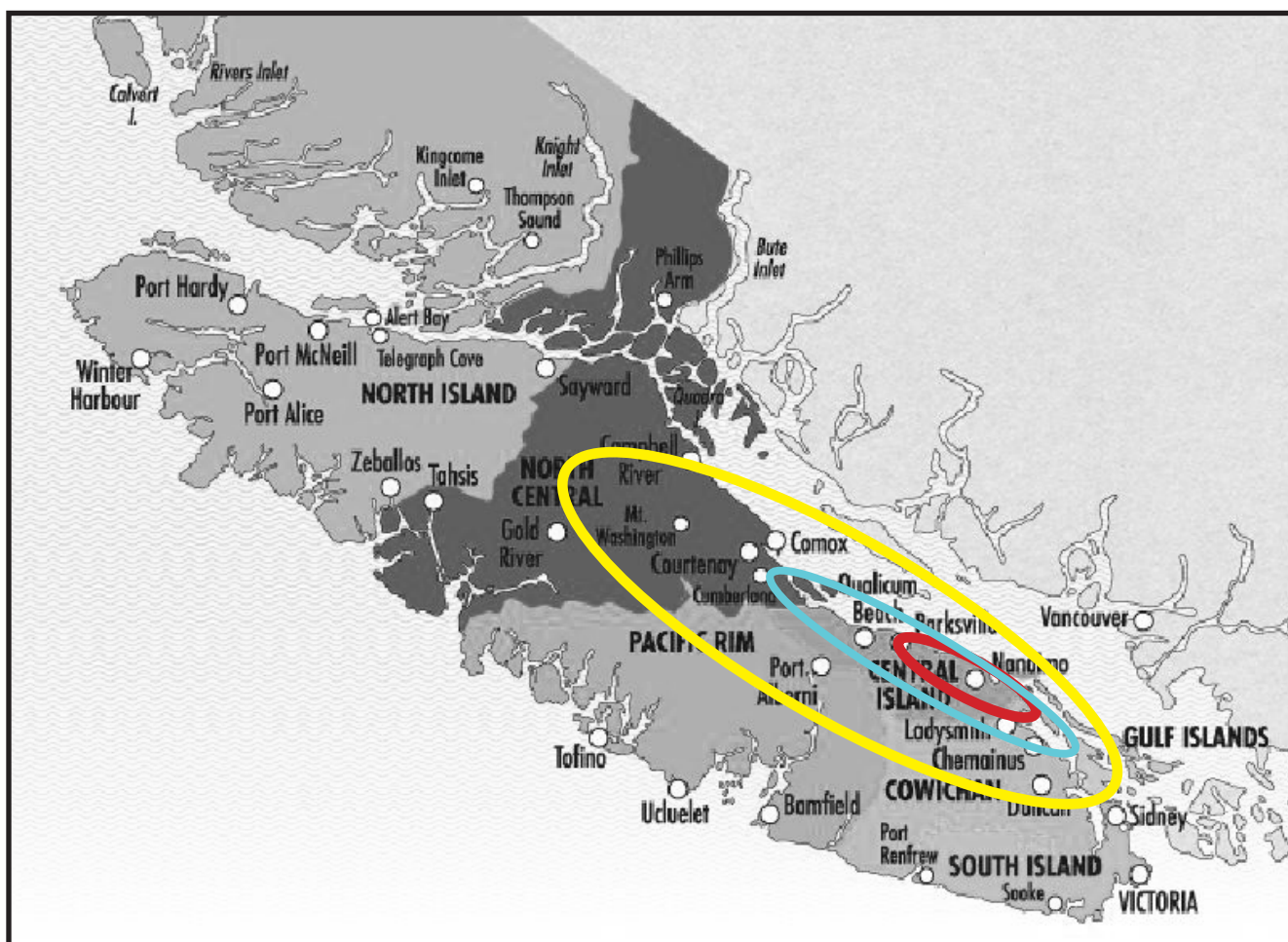
Source: BCSTATS (UA = Unincorporated Areas)

More recent additional information received from Nanaimo Economic Development included the following:

Market Trade Area – Demographics approx.. 80 km as discussed per your request

Nanaimo's location has helped the city develop as an important retail, service, transportation and distribution centre for central and northern Vancouver Island. The City of Nanaimo covers 88.19 square kilometres within the Nanaimo Regional District. The Regional District stretches north to Bowser, south to Cedar and west to Errington, an area of 2041.32 square kilometers. The City of Nanaimo accounts for 4.3% of the total land area of the region, but is home to 58% the population and operates as the region's economic and employment centre.

The following map displays Nanaimo's primary, secondary and tertiary trading areas. The primary trade area, the inner circle, includes the Regional District of Nanaimo and the Town of Ladysmith; the second ring encompasses two additional regional districts (Alberni-Clayoquot and Comox Strathcona). The outer circle indicates the tertiary trade area.



Nanaimo's Trade Areas

A profile of the city's trade area is outlined in the Table below. The city's primary trade area comprises about 163,000 people drawn from the Nanaimo Regional District and the town of Ladysmith. This trade area has been growing due to population growth. On average, the primary trade area grew by 5.7% between 2006 and 2011.

The city's secondary trade area has over 140,188 people in the Alberni-Clayoquot region to the west, and the Comox Strathcona region to the north. This area has grown on average 1.71% between 2006 and 2011.

The city's tertiary trade area has an additional 86,000 people from the Cowichan Valley region to the south, and the Mount Waddington region to the north. This area has grown by 4.02% between 2006 and 2011. Thus, the total trade area is approximately 373,314 persons.

In 2015 the approximate population of the three trade areas is 388,937 (BC Stats)

Table 7: Nanaimo's Trade Areas				
	2006	2011	% Change	2015
Primary Trade Area (40km - .25 hours)				
City of Nanaimo	78,692	83,810	6.50%	90,524
Remainder of Nanaimo Regional District	59,939	62,764	4.71%	64,048
Ladysmith	7,538	7,921	5.08%	8,177
Subtotal	146,169	154,495	5.70%	162,749
Secondary Trade Area (82-107 km - 1 hour drive)				
Alberni-Clayoquot RD	30,664	31,061	1.29%	30,106
Comox Strathcona RD	101,595	103,458	1.83%	110,082
Subtotal	132,259	134,519	1.71%	140,188
Tertiary Trade Area (150+ km -1.2+ hours)				
Remainder of Cowichan RD	69,391	72,794	4.90%	74,610
Mount Waddington RD	11,651	11,506	-1.24%	11,387
Subtotal	81,042	84,300	4.02%	85,997
Total (All Trade Areas)	359,470	373,314	3.85%	389,634

4. PUBLIC ENGAGEMENT PROCESS

PROCESS DESCRIPTION IN PROGRESS

5. EVENT CENTRE PROGRAM & DESIGN

The primary generator of an Event Centre's facility program is based on the wide array of activities and events which are described in greater detail in Section 2.

Therefore it's not surprising that it's the following type of events that establish the main overall building requirements and spectator viewing capacities.

- A Nanaimo based Western Hockey League (WHL) Team and other possible teams including indoor lacrosse, minor league basketball, etc.
- Touring shows including concerts and family shows such as Disney on Ice, Oprah, Tony Robbins, Cirque du Soleil, Sesame Street, etc.
- Other events such as community and cultural festivals, business and educational activities and recreational sport activities.

Western Hockey League Team

The Western Hockey League has an average attendance of 4535. Two cities that are relatively comparable to Nanaimo's demographics are Kelowna and Red Deer where the average attendance has been 5,635 in Red Deer and 5,242 in Kelowna. Of course, their attendance varies as the team is winning and losing and in response to who they are playing on a specific evening. The capacity for hockey in Red Deer at the Enmax Centrium is 7,111 while Kelowna's capacity for hockey at Prospera Arena is 6,286.

Solely with respect to the right capacity for a WHL Team in Nanaimo we would recommend a capacity of approximately 5700. It is important that this can adjust downwards for games that are less popular while still giving the impression that the building is sold out. We have newer design strategies that allow this to occur in a cost effective manner.

The larger capacity will assist in attracting more of the premium type of Hockey Canada single exhibition games and championship tournaments that occur regularly in this country, excluding the World Juniors that has been elevated to buildings of 15,000 capacity or greater. This building size would also be more attractive to the CHL at the possibility of hosting a Memorial Cup, as Red Deer did in 2016. This event alone brings tremendous economic benefit to any city during its 10 days of the event plus the lead up to it.



Touring Shows

Touring shows are events that travel to different cities that the acts' promoters decide to perform in and include concerts, family shows, WWE, rodeos, etc. etc.

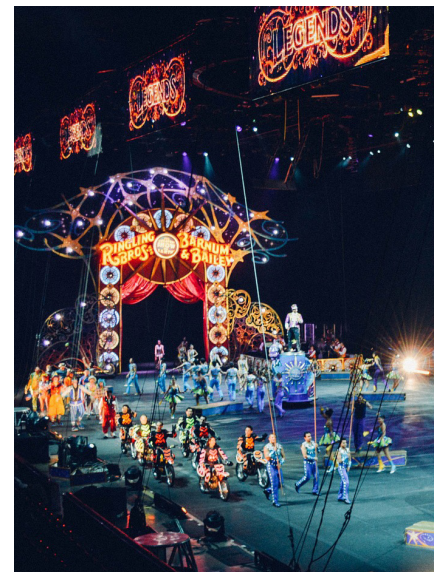
While their agreements with the arena/venue are very one sided in the act/promoters' favor, these events bring significant economic benefits to a city by attracting more visitors to the city.

Assuming that there is a sufficient regional population in a location, the biggest factor in selecting a city to perform in, is the number of manifested seats or viewing positions. With a concert and seating in the round, most mid-sized regions (with a captured market of 70,000 to 250,000) such as Kelowna, Kamloops, Red Deer, etc. that have arenas built in the last 25 years have a manifested capacity of approximately 6,500 to 7,500 for a concert in the round and attract approximately 25 touring shows per year. The facilities that have 8000 to 9000 manifested viewing positions (i.e. Abbotsford and London ON) are hosting approximately 35 to 40 touring shows which include bigger marquee or signature events (such as Elton John next spring).

In these type of buildings, the normal (or natural design) difference between the desired hockey capacity and a touring show capacity is approximately 1,500. If an objective is to maximize the number of touring shows, the challenge with a 5700 capacity hockey venue is to design a facility that has approximately 2,500 more capacity for concerts in the round without adding significant cost. Again, we have several new design/ construction methodologies that achieve this goal.

In addition to capacity, touring shows will also look for overall good quality, excellent acoustics, adequate washrooms, fast move-ins, sufficient rigging loads, rigging heights and grids, stage power, etc. While these are expected by the promoter, it is still amazing how many new buildings are deficient with some or all of these requirements.

While private suites and loges, sponsor products are of tremendous value to the venue and the home team, they are of little value to the touring shows because they normally don't get any of these longer term contracted revenues.



Other Events

Today the Nanaimo's successful 800 seat Port Theatre hosts a wide range of events. This is both a facility and an organization that has incredible resources and knowledge about the region's entertainment market and infrastructure. The critical component for a new Event Centre is to be totally complimentary with the Port Theatre. This ranges from providing features and capacities that are non-competitive to working together on a cross utilization of the same resources including coordinated marketing plans and ticketing. In this manner both facilities together will deliver greater benefits to Nanaimo.

There are many other cultural and community festival events and activities that Event Centres can support and host that expand the facility's civic nature and profile.

While not required to attract a WHL Team or host Touring Shows, there are often relatively small program and design adjustments required to support and maximize the Event Centre's utilization for these Other Events.

These include a covered outdoor public activation plaza, public galleries and sitting areas to watch event set-ups and youth figure skating or hockey practices and to host amateur art shows etc, indoor soft-surface circular walking routes with interesting views, group sales and other gathering places and rooms that can be used by not-for-profit community and cultural groups at non event times, etc.

The key element in determining what are the right things to include is community consultation, both with individuals and existing groups and institutions throughout the region. If the City decides to proceed with the facility, it is essential that an ongoing process for community and stakeholder input is established.

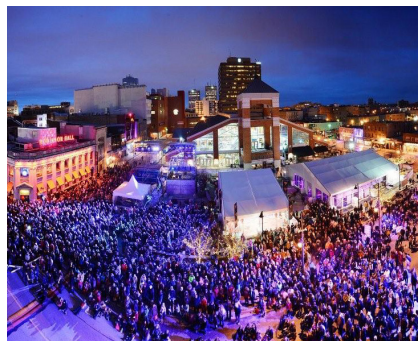


Building Program

Based on the foregoing, the following provides an overview of our recommended Facility Program for a new Nanaimo Event Center.

Understanding the demographics of the City and Region of Nanaimo, the Centre's key attributes are recommended to be:

- Large enough to be ideal for the home of a WHL Team.
- Features to attract a broad variety of touring shows and if the budget permits, large enough to attract quality signature touring shows that play in venues with under 10,000 capacity.
- A quality facility that provides a 1st class experience for guests coming to a broad selection of entertainment performances including touring shows, WHL hockey, other quality sports, along with community, educational, and business events --- whether the guests are local residents or driving 1 to 2 hours to come to an event.
- A wide cross-section of seating and hospitality options that range from 'best in class' premium seating offerings to fun and exciting specialty seating sections for families, youth, seniors, small businesses, etc.
- A design that allows an efficient future operation of the Centre from maintenance to fast event move-ins and from convenient guest services to long term sustainability.
- Some areas for growth that allow self-funding complimentary uses such as personal health and training, physio, sports medicine, etc. to be accommodated in the future.



The pictures above show the wide range of events hosted both inside & outside of Brisbin Brook Beynon's Budweiser Gardens in London Ontario.

NANAIMO EVENT CENTRE PROGRAM

October 13, 2016

BASE PROJECT

SEATING

- Sight Line Criteria: 130mm (5") above the eye level of a person seated 2 rows in front to a focal point located 2.4m (8ft) from the inside face of the dasher boards and 0.6m (2ft) above the ice slab.
- The Approximate Spectator Viewing Capacity ["SVC"] includes all seats and designated standing positions which conform to the above Sight Line Criteria including General Seating; Club Seating; Suite and Loge Seating; Wheelchair Seating (and attendant seating); Bar or Restaurant Seating; Hospitality, Group Sales and/or Corporate Sponsor Suites; Media/TV Seating, and any other Seating Products and Designated Standing Room Positions incorporated into the building:
 - Hockey SVC - 5,700 spectators
 - Concerts SVC - 7,100 spectators
- General Seating
 - Minimum Chair Width: 510mm (20") (allow for maximum 3% being 480mm (19") provided not beside each other).
 - Minimum Tread: 860mm (34")
 - Seats between Aisles: 22 (back rows in corners: Max. 26).
 - General Seating may include a maximum of 10% Designated Standing Room Positions (with rail) in various locations in arena bowl.
 - Approximately 4,300 SVC
- Club Seating
 - Chair Width: minimum 530mm (21")
 - Approximate Capacity: 800
 - Minimum Tread: 860mm (34")
 - Maximum Seats between Aisles: 18 (back rows in corners: Maximum 22)
 - Wheelchair Seating: approximately 0.5% of any fixed seating required with same for companions all per Minimum Code Requirements

- Suites
 - Minimum No.: 22 with ability to increase.
 - Seated SVC/Suite: 16 (Chair Width: Minimum 530mm (21")).
 - Minimum Tread - 915mm (36")
 - Built-in counter/buffet, fridge, sink, storage, T.V.
 - Suite WR's to be independent of suite. (I.e. VIP WR's for suite users only to be situated at convenient locations along suite corridor).
- Loges
 - Approximate No.: 22
 - Seated SVC/Loge: 4
 - Minimum Tread: 1220mm (48")
 - Built-in Counter with TVs
- Restaurant/Bar:
 - Approximate No.: 160 SVC and up to 100 additional non-SVC
 - Area: Minimum 280m² (3,010sf) (Kitchen N.I.C.)
 - Restaurant/Bar must have potential for separate exterior image and access at non-event times.
 - Arena Reduction System: Bowl design to permit a variety of end stage "curtaining" between a half bowl and up to a full bowl.

PUBLIC AREAS

CONCOURSE (& ENTRIES)

- Building to have two major general spectator entrances, one Club Seat/Private Suite Entrance and one staff and services entry (which may be combined with Practice Rink Entry).
- Spectator entrances to provide convenient, direct access to washrooms, concessions and vomitories to seating.
- General and Club Concourses to be based on approximately 0.28m²/person (3.0sf) and (0.33m²/person (3.5sf) respectively.
- Suite Concourse to be approximately minimum 1.7m (5.5ft) wide.
- Public Skating Skate Change Areas: (approximately 100m² (1,075sf).

WASHROOMS

- Based on 50% male and 50% female occupants in building.
- Male Water Closets (“WC”) and Urinals: 1/80 (80% urinals).
- Female Water Closets: 1/50
- Lavatory: 35% of WC/Urinals.
- Above ratios to be increased 20% in Club Concourse.
- Provide ability to change over flexibility of male/female washrooms to female/male washrooms respectively (i.e. with signage, etc.).
- Family Washrooms: 2 per level.
- Washroom layout to incorporate wheelchair requirements per code.

CONCESSIONS

- One permanent point of sale (POS) per 150 spectators (with 1.5m (5ft) counter and 10m² (110sf)/POS).
- Three (3) portable POS/1,000 spectators (i.e. a kiosk).

RETAIL

- One main store (with storage area) at street level with exterior visibility and (if possible) accessibility: 190m² total. (2,045sf)
- Three (3) Portable Retail Outlets (i.e. kiosks) located on each main Concourse: 20m² (215sf) per outlet.

BACK OF HOUSE

FOOD & BEVERAGE

- Concessions (see above)
- Suite/Hospitality Pantries (2): 60m² (645sf) total
- Concession Central Storage and Prep. Kitchen: 370m² (3,980sf)
- Restaurant and Premium Seating Kitchen: 190m² (2,045sf)
- Offices (see Operations below)

MEDIA

- T.V. Broadcast Booths: 2
- Radio Broadcast Booths: 2
- Written Press Viewing Positions: 16
- Media Meeting, Work and Lounge to be at either Press Viewing Position Level or Event Level: 30m² (320sf) (to double as building meeting room and to include adjacent storage room).
- Media Interview: 20m² (215sf)

OPERATIONS

- Administrative/Finance Offices: (12 people) 280m² (3,010sf)
- Ticket Sales Main Ticket Area
 - Minimum 4 windows to exterior Minimum 2 windows to concourse (including customer service)
 - 2 offices: 20m² (215sf) total
 - general office (8 workstations): 40m² (430sf)
 - storage/safe: 20m² (215sf)
 - washroom/coffee: 10m² (110sf)
- Food and Beverage, Retail and Catering Offices (3 people): 30m² (320sf)
- Security, Building Control Office and Employee Entrance: 30m² (320sf)
- First Aid (adjacent to Security/Building Control): 15m² (160sf)
- Event Staff Areas: 40m² (430sf)
- Maintenance Office (1 private office and 1 general office for 2): 30m² (320sf)
- General Purpose (Green Room/Catering) at Ice Level (30 people capacity plus adjacent storage):
 - 45m² (485sf) total (OPTIONAL)
- Production Offices (2): 20m² (215sf) total.
- Circulation (5% of above).

MISCELLANEOUS

- Arena Bowl Scoreboard, Sound System, and Security Control Room: 40m² (430sf)

TECHNICAL

- Ice Plant: 100m² (1,075sf)
- Zamboni Storage: 45m² (490sf)
- Storage (interior with 4.5m (15ft) clear ht.): 370m² (3,980sf)
- One Miscellaneous Storage Room of 20m² (215sf) on each level.
- Marshalling/Receiving/Staging (with 2 truck bays): 280m² (3,010sf) (not including exterior area).
- Workshop: 45m² (485sf)
- Ice: NHL size: 1,580m² (17,000sf)
- Direct Access to Rink Slab by Tractor Trailer: Minimum 4.5m (15ft) headroom
- Garbage, Recycle Room – 45m² (485sf)
- Janitors Room – 6 @ 2.5m² (27sf); 15m² (160sf) total
- Score Clock
- Event Lighting
- 4 follow spot platforms
- Catwalk over primary stage areas.
- Roof structural capacity to carry user loads (concerts, grids, etc.).
- Circulation (5% of above).
- Mechanical/Electrical as required. (Estimate 7% of GFA).

VERTICAL CIRCULATION

PASSENGER/SERVICE ELEVATORS

- Two Passenger-Only Elevators @ 1,590 kg (3,500 lbs.) at 10m² (110sf)/elevator and one (1) Passenger/Service Elevator @ 2,040 kg (4,500 lbs.) at 15m² (160sf)/elevator. It must be possible to get full size car to Main Concourse.
- Emergency Egress Stairs as required.

HOME HOCKEY TEAM

- Administrative Offices (12-15 people): 200m² (2,150sf)
- Team
 - Dressing Room (24 stalls): 35m² (2,150sf)
 - Steel Lockers: 20m² (215sf)
 - Players' Lounge: 40m² (430sf)
 - Showers (8): 15m² (160sf)
 - Washroom (2 water closets, 2 urinals and 4 sinks): 30m² (300sf)
 - Hot Tub: 15m² (160sf)
 - Coaches Office and locker room: 65m² (700sf)
 - Trainer (3 benches, storage, office): 40m² (430sf)
 - Equipment and Uniform Storage and Laundry: 45m² (485sf)
 - Equipment Repair (Sharpening): 15m² (160sf)
 - Exercise/Weight Room: 100m² (1,075sf)
 - Workshops and Landry: 65m² (700sf)
 - Doctor: 15m² (160sf)
 - Circulation: 75m² (800sf)

VISITING TEAMS

- Dressing Rooms (4) 200m² (2,150sf) total. (3 @ 45m² (485sf) and 1@ 65m² (700sf)

OFFICIALS & STARS

- Change / Dressing Rooms (4): 85m² (915sf) total.

TECHNICAL EXTERIOR:

- Approximately 2,000m² (21,530sf) of exterior loading/service space adjacent to interior marshalling/loading area
- Minimum 28m (90ft) width for truck turning

NOTES

- Where applicable, all above items are subject to local Building Department approval. All areas are gross floor areas including 50% of enclosing walls that are adjoining with other program areas and 100% of enclosing exterior walls.

End of Base Project Program

In Phase 1, we also proposed these options:

OPTION A

- Concert SVC is 8,300 instead of 7,100, which requires 2,200m² (23,680sf) of additional related guest services, including multi-purpose rooms for recreation, meetings, community initiatives, etc. This would augment the facility use as a recreational/community centre. Hockey capacity stays the same as in the BASE FACILITY above.

OPTION B

- Upgrade exterior and interior architecture including addition of a large covered exterior entry activation porch/pavilion to make this a one-of-a-kind made-in-Nanaimo public assembly community centre.



OPTION C

- If the City wants to minimize the cost of the facility while still maximizing the opportunity to attract a WHL Team, we recommend a 5,000 to 5,200 seat facility that has minimal facilities to accommodate touring shows. Obviously many of the benefits discussed in Section 6 will not be realized.

One of the strongest and most consistent opinions in the public engagement process was that if the City moves forward with the Event Centre, it should be programmed, designed and constructed as a first class facility. In other words, if it will be second class don't build it. For this reason, we recommend that the Project include Options A&B (that are described above) and that Option C not be pursued further.

THE 2nd RINK ISSUE

To assist in activating the Centre and the public spaces around the facility 365 days per year, if this project proceeds, we recommend that additional retail, hospitality, etc. areas should be included provided that market research clearly indicates that they will secure rents from 3rd parties that will provide an acceptable payback.

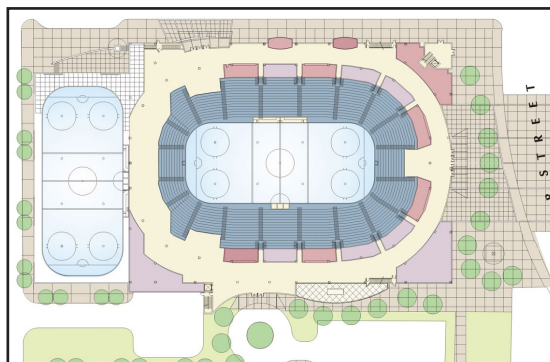
Also as we reported in Phase 1, many multi-use community spectator arenas that accommodate ice sports also build in the same complex, one (or sometimes more) additional ice sheet(s) for ice sport recreational and training uses and to support events in the spectator arena.

The advantages of an extra rink are as follows:

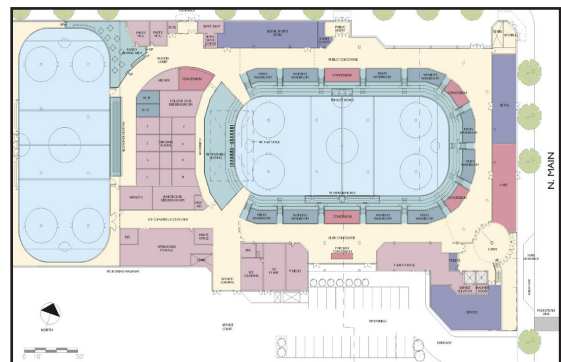
1. Less expensive to build and to operate than a stand-alone single rink.
2. It makes the spectator arena more attractive for events like hockey, figure skating, curling and other sport tournaments, competitions and championships. As well, it allows for smaller trade shows and festivals such as a local Oktoberfest or Wine Festivals that have an entertainment component and can be best suited for the combined arena floors rather than the conference centre.
3. It allows the Home Team(s) to use the extra rink for practices when the main rink is being used by other events thereby allowing consistent use of its dedicated locker room.
4. It allows the overall complex to better operate a recreational and training ice sport program that usually leads to more utilization of the main spectator rink on dark event days.

The challenges of the additional rink are cost (approximately an additional \$7m) and the required additional land. As well, Nanaimo already has 4 interior ice rinks today at 2 complexes plus another rink dedicated to curling. With the addition of a new Event Centre spectator rink it will be difficult to justify the addition of another rink which would then increase the number of existing 4 multi-use ice rinks by 50%.

If sufficient land exists (either now or in the future at the chosen site), it is a consideration to plan for the construction of a 2nd ice pad in the future, but is not essential because of the proximity of Nanaimo's other rinks.



Bloomington



Elmira

CONCEPT DESIGN

Based on the above recommended Building Program and the planning constraints of the two preferred sites in Section 6; we have developed a unique design based on previously successful Event Centres and that meets the following criteria and features:

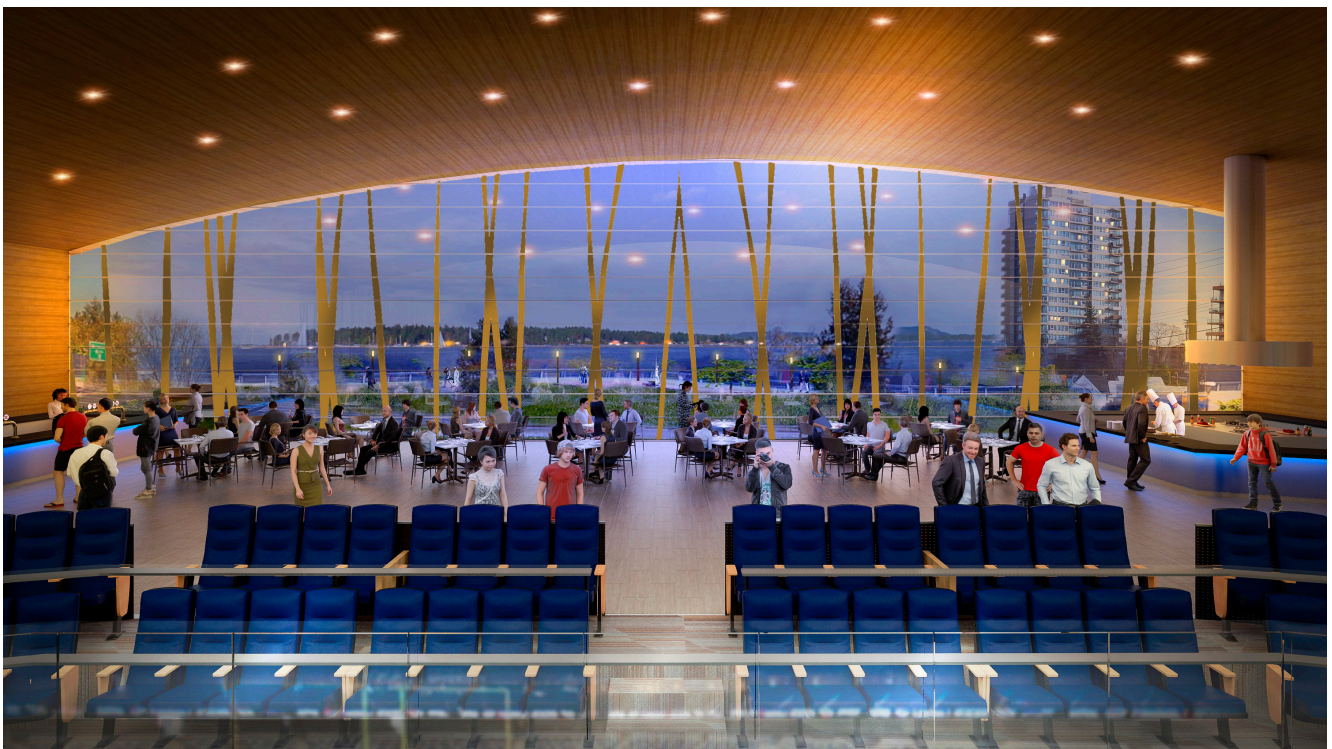
- More concert seating than would be normal in a 5700 capacity hockey arena.
- A 3 level steep bowl for an 'on-top-of-the-action' event experience for all guests and fans and to realize a 'big arena feel'.
- A compressed building footprint that allows it to maximize other development on the Howard Johnson Site and to fit on the 1 Port Drive Site.
- A proven design template that maximizes value for the available budget.

This is a brief description of the BASE FACILITY following design drawings that are on the following pages:

- The main concourse, primary retail store(s), ticketing, food & beverage offerings, etc. are at grade or street level allowing easy direct access from the main entry plaza and other entries on the surrounding streets and/or walkways. As well, direct and separate access can be provided to the L3 restaurant and bar. This will provide the infrastructure and uses to activate the facility and adjacent urban areas 365 days a year. Truck servicing will also be directly at stage level to facilitate the critical criteria of fast and efficient touring show load-ins.
- From the main concourse, the guests will enjoy a wide selection of food and beverage offerings and other guest services while the majority of guests will be able to go quickly and directly to their seats from this level. This will result in a fast non congested entry experience.
- Open stairs and elevators will allow people to quickly ascend to the Level 2 Club Concourse that is open to great views of the event bowl. This level should also be available as a 360 public walking circuit when the weather is not ideal. This will be popular with seniors.
- The stairs and elevators will then continue to the Level 3 Suites and Restaurant/Bar and Party Suites. All public areas at this level will have fantastic views of both the events and the surrounding neighborhood; especially the restaurant which on both of the preferred sites will have dramatic views of the water.



Howard Johnson Site - Level 3 View



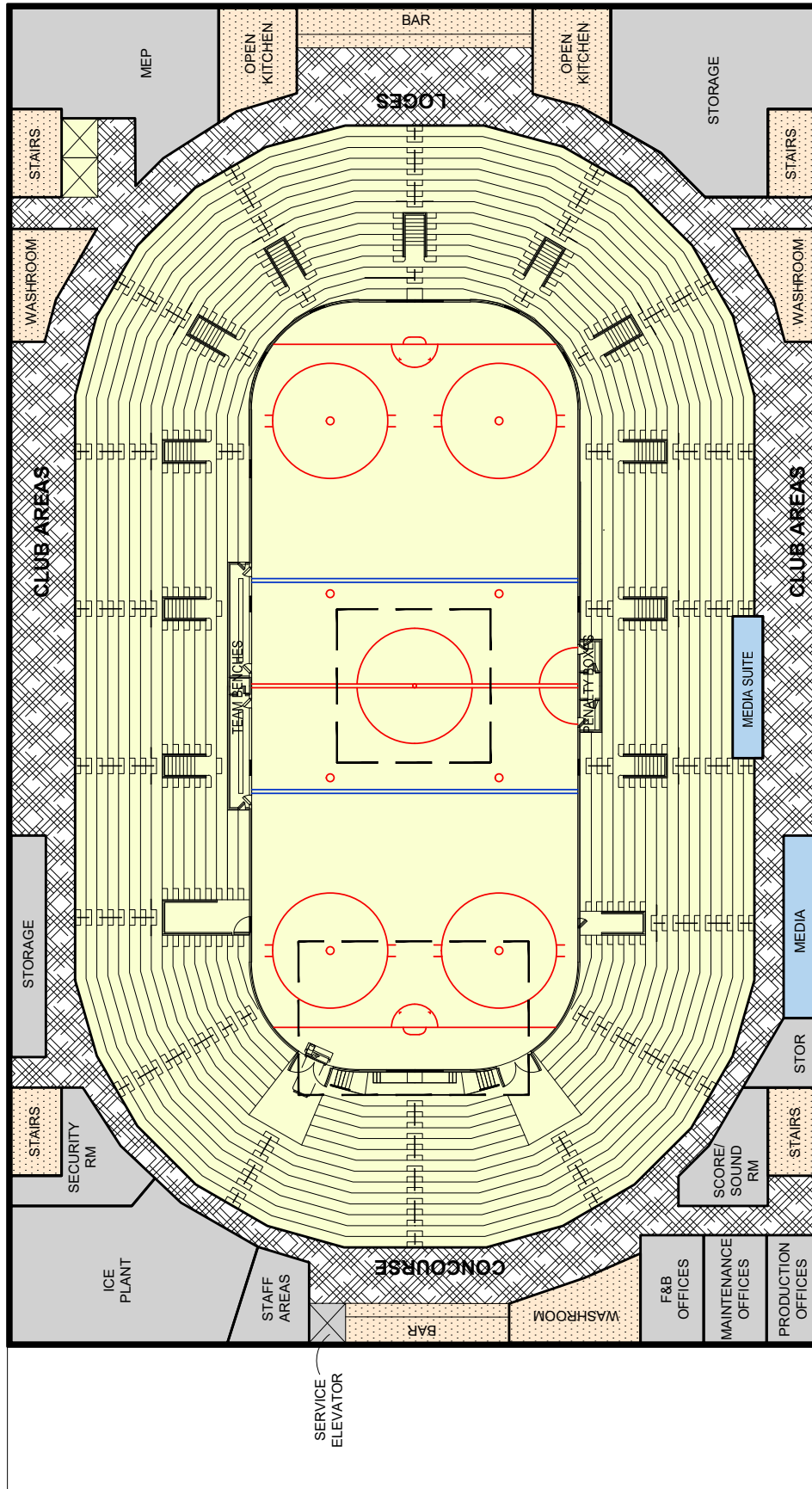
1 Port Drive Site - Level 3 View

- The event bowl will accommodate 5700 for hockey and with the recommended Option A expand to 8300 for concerts in the round. The specialty seating will include a dedicated family section and separate youth section, upgraded club seating and adjacent amenities, party suites, loges, in-bowl restaurant/bar seating and private suites. The maximum 8300 capacity will allow Nanaimo to attract and host larger and more signature touring shows.



Rogers K-Rock Centre - Similar size to proposed Nanaimo arena.

WILL CHANGE AS MORE INFORMATION
BECOMES AVAILABLE & AS THE DESIGN
DEVELOPS.



EVENT CENTRE

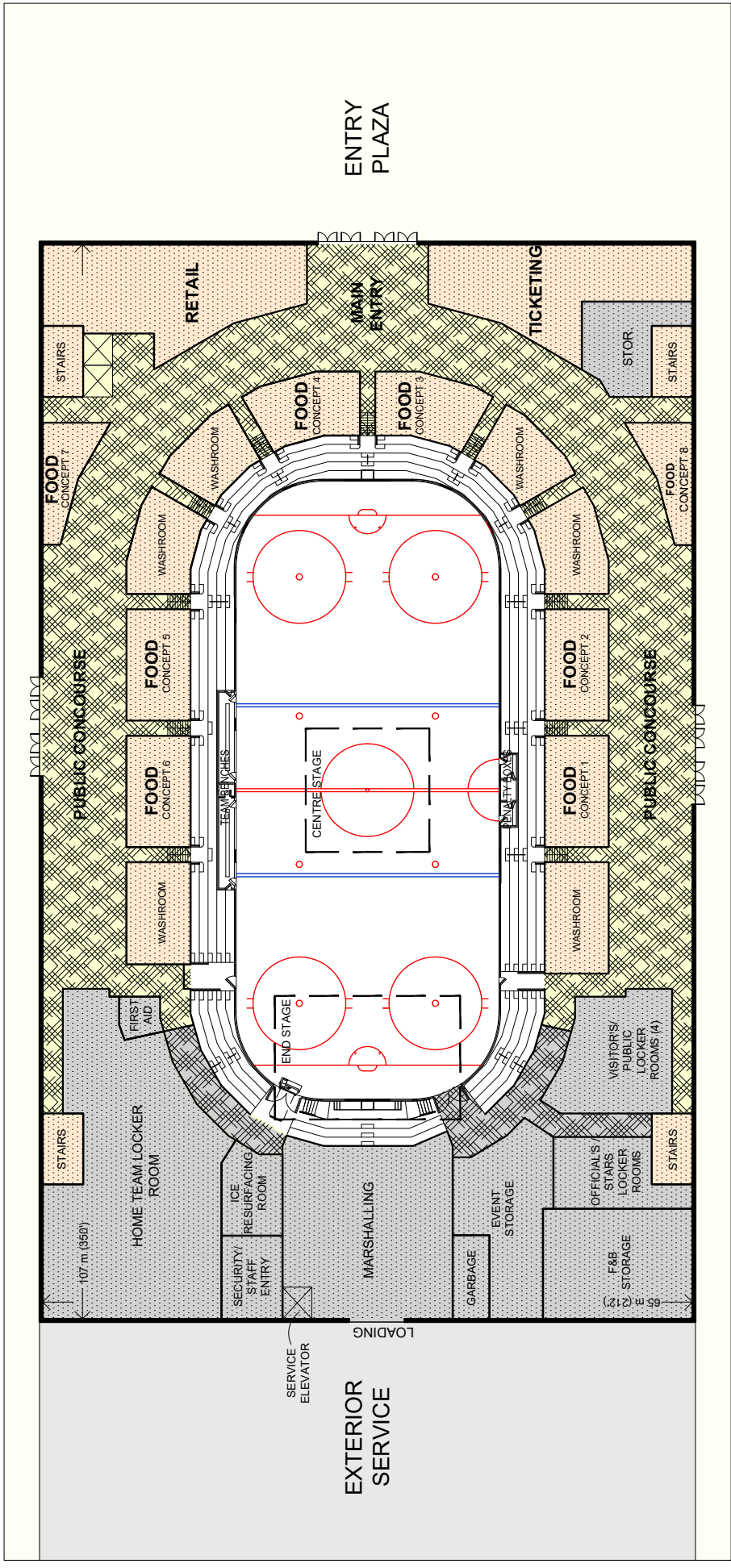
CLUB LEVEL 2
NOVEMBER 30, 2016

BASE FACILITY



IN PROGRESS

THIS IS A PRELIMINARY FLOOR PLAN THAT WILL CHANGE AS MORE INFORMATION BECOMES AVAILABLE & AS THE DESIGN DEVELOPS.



EVENT CENTRE

EVENT LEVEL 1
NOVEMBER 30, 2016

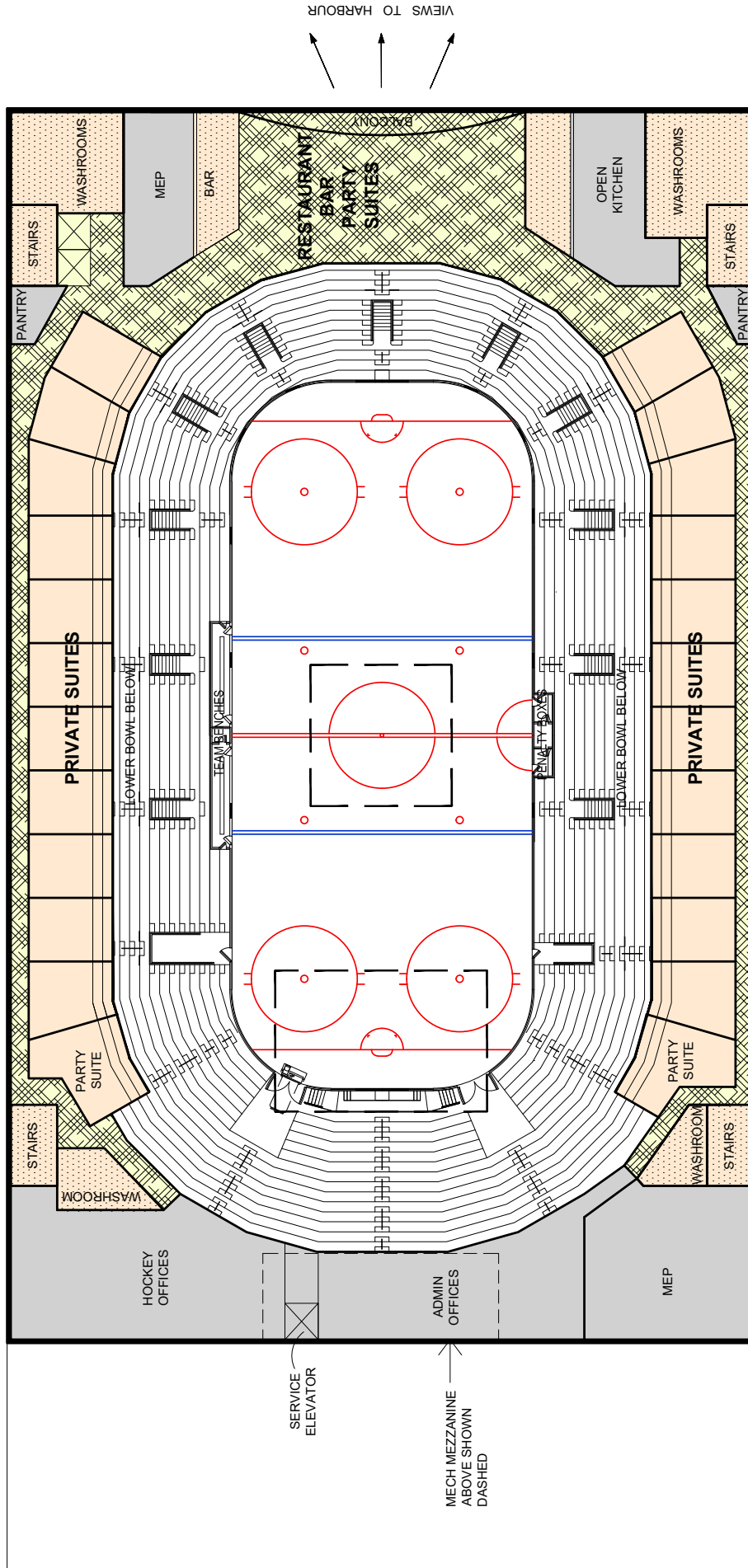
BASE FACILITY



**BRISBIN
BROOK
REYNON** ARCHITECTS

IN PROGRESS

THIS IS A PRELIMINARY FLOOR PLAN THAT WILL CHANGE AS MORE INFORMATION BECOMES AVAILABLE & AS THE DESIGN DEVELOPS.



EVENT CENTRE

SUITE & RESTAURANT LEVEL 3

NOVEMBER 30, 2016

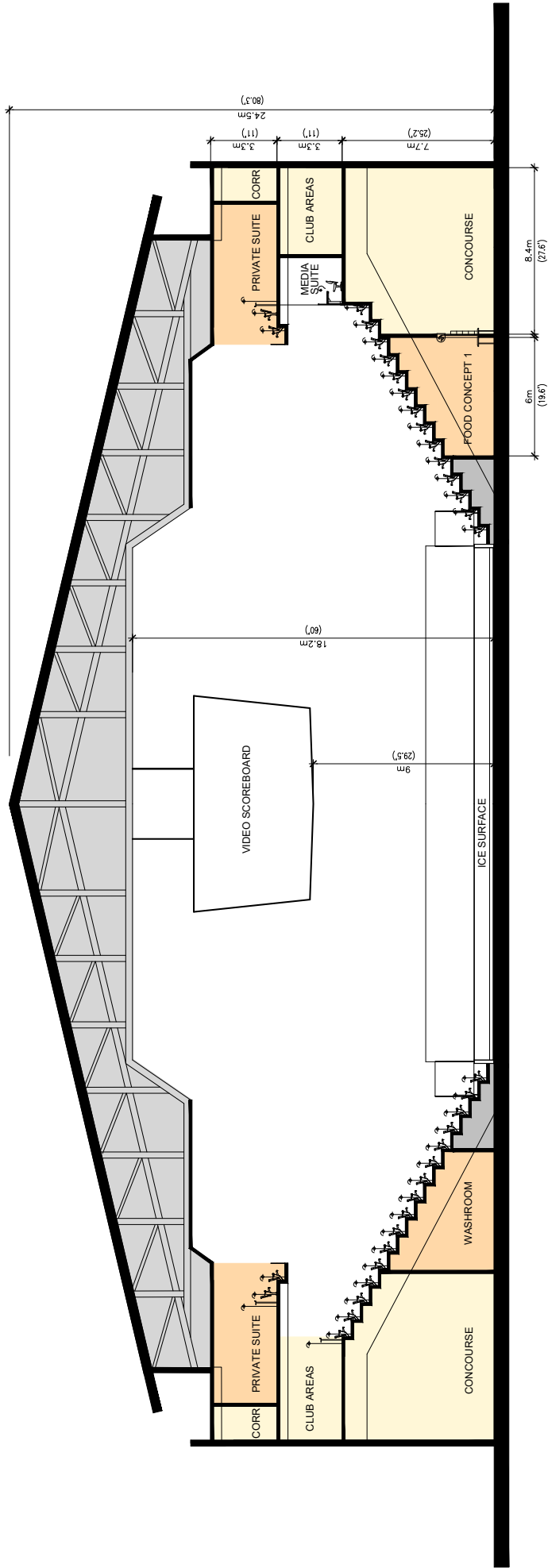
BASE FACILITY



**BRISBEN
BROOK
REYNON** ARCHITECTS

IN PROGRESS

THIS IS A PRELIMINARY BUILDING SECTION THAT WILL CHANGE AS MORE INFORMATION BECOMES AVAILABLE & AS THE DESIGN DEVELOPS.



**BRISBIN
BROOK
BEYNON**

ARCHITECTS

BASE FACILITY



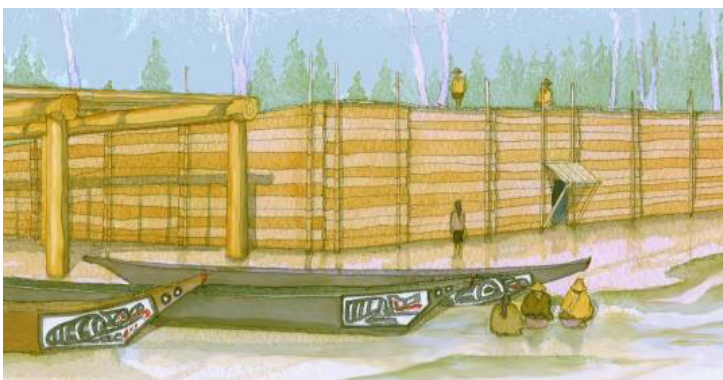
EVENT CENTRE

BUILDING SECTION

OCTOBER 14, 2016



The recommended Option B will turn this community centre into a very unique structure. One idea is to become the largest modern interpretation of a traditional First Nation Coast Salish Long House. Its primary building materials would be renewable wood and stone and glass. The East Coast Salish developed a traditional forum of architecture that was distinctive and unique in the world and based on the natural environment of the lower BC and extreme northwest USA coastal areas. These are some pictures of their structures.



With the recommended Option B, this project would also be an environmental showcase with a green roof and many other environmental initiatives. A rendering is attached on the following pages.



6. SITE EVALUATIONS

Following a review of previous reports, an on-site examination of many apparent sites, conversations with numerous people in Nanaimo; and a review of a short list of sites, and our recommendations to Council in October, we have proceeded to complete a detailed review of the following two sites:

1. The Howard Johnson Site (“HJS”) at Terminal Ave and Comox Rd on the north side of downtown.
2. 1 Port Drive Site (“1PDS”) that is between Front St and the existing rail line to the south on the south side of downtown.



Map Not To Scale

As background information, we previously reviewed and eliminated these three (3) sites for these reasons:

- The west side of the Maffeo Sutton Park Site because:
 - The site is too small for a modern Event Centre especially when the exterior trucking and logistics area is accounted for.
 - The site is a very popular and successful outdoor event area in a public park that has deep positive emotional ties to the citizens of Nanaimo, and a large permanent structure could generate a strong negative response from many residents.
- The Existing Ballpark because:
 - It will not result in the full potential of ancillary economic and community benefits that a downtown site will accomplish.
 - It will require a large amount of new parking for the Event Centre because existing parking will be in use for the aquatic and ice centres and the University.
- The Existing Curling Arena Site because:
 - While closer to downtown it is still too far to produce the economic community benefits of a site immediately adjacent to downtown.
 - The large amount of required parking will be difficult to satisfy without severe impacts on the adjacent park.



SITE PLANNING

HOWARD JOHNSON SITE

This is a privately owned site of approximately 7 acres at the northwest corner of Comox Rd & Terminal Ave. It is noted that there are government owned lands along Comox Road that are surrounded on 3 sides by the HJS but are not presently part of the Howard Johnson Site. Discussions have been initiated with the Provincial Government with respect to purchasing these lands from them. While draft site plans were completed for scenarios with and without these lands, it was determined that the following site plan with the additional lands is significantly better than without these lands, and it is this scenario that should be advanced. Therefore, if the City decides that this is the preferred site, efforts must be made immediately to secure these lands.



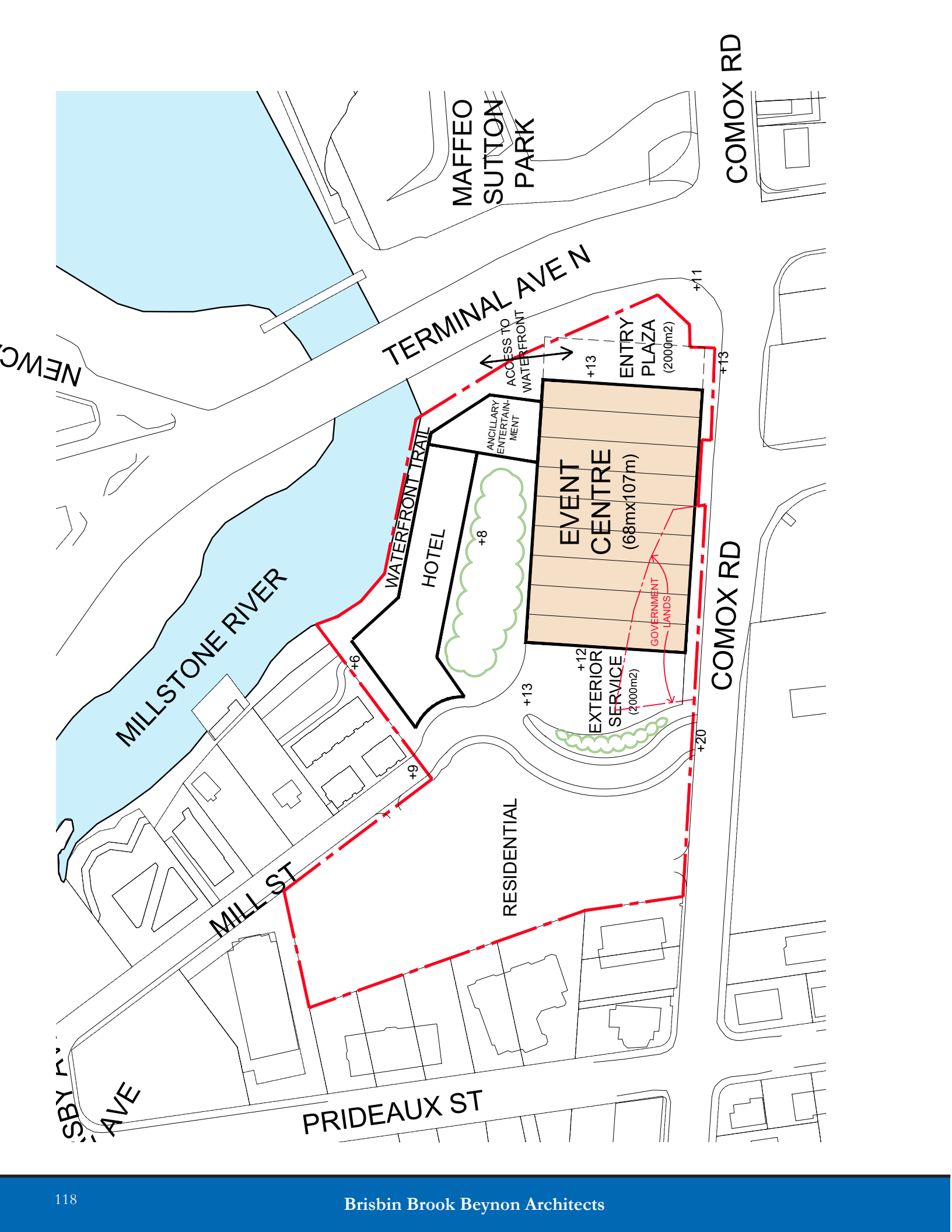
Not To Scale

The EC is proposed to be a prominent building at the north-west corner of Comox and Terminal with a major entry plaza immediately adjacent to the intersection. There will be a dedicated vehicular drop-off area for disabled on Comox to the south of the EC with a new entry road to the west. The EC's exterior service area that is on the west will also function as disabled & VIP parking during events.

The remaining HJS lands on the west are proposed by the land owner for residential while the area along the Millstone River could be used for a new hotel. Both the new residential and hotel will be accessed from the new entry road on the west side of the EC. Based on photo of the existing site and a preliminary in-progress visualization of the site with a proposed site plan now follows.

Discussions with an Owner of the Howard Johnson Site over the past few weeks about their objectives to maximize the private sector development potential of their site & with our knowledge of the planning requirements of Event Centres; it is apparent that it will take additional time to realize the best site plan to balance the requirements of both components. It is also apparent that there are many possible variations to our initial site plan (shown here) that could possibly improve the overall development.

In summary, if it is decided to advance the HJS as the preferred location for the Event Centre, additional analysis & design work is required to find the optimum solution.





Existing



Proposed

Howard Johnson Site Looking Southwest

1 PORT DRIVE SITE

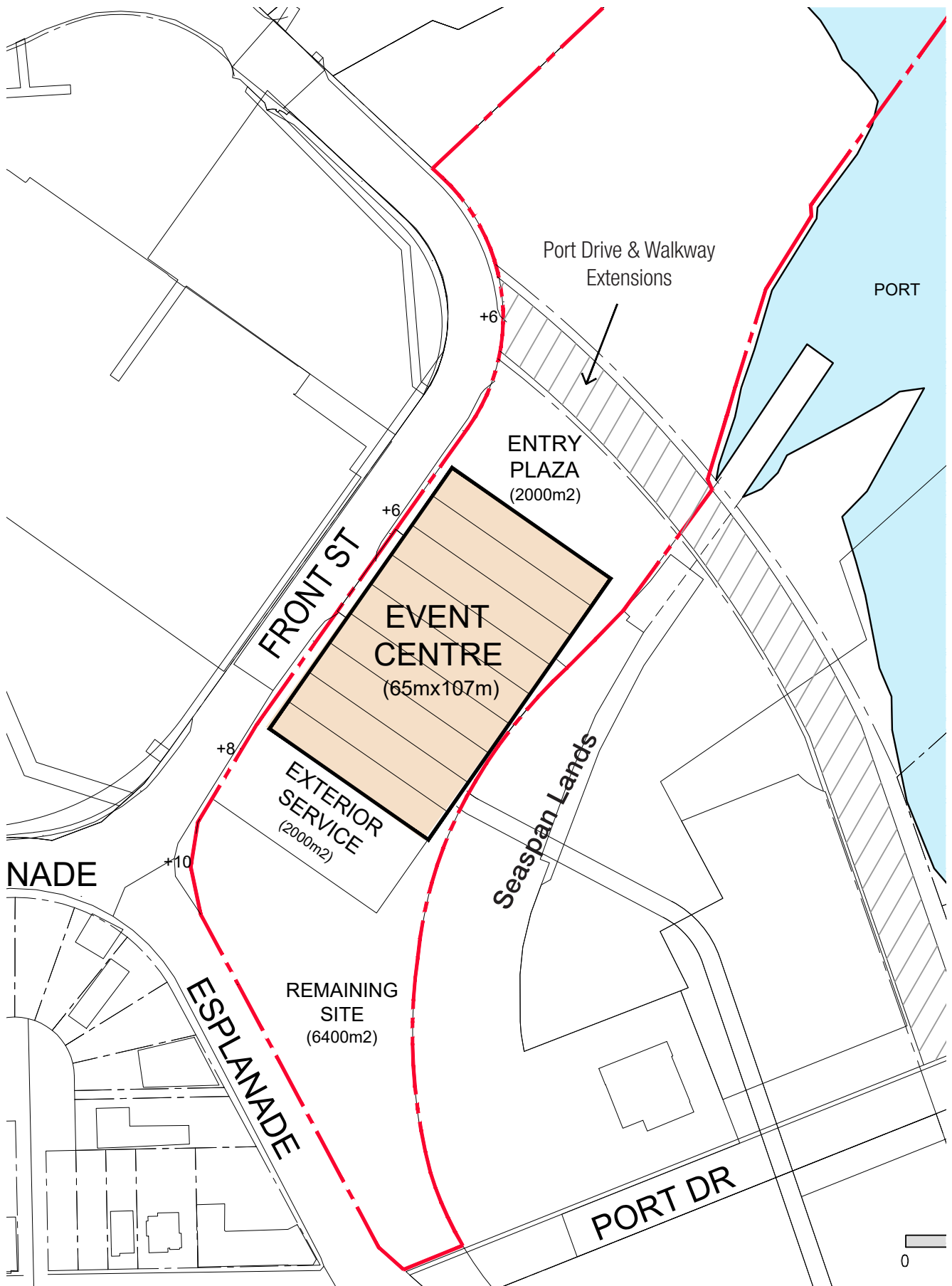
The site plan on the next page shows the portion of the port lands that the City now owns. It is outlined with a red dotted line. The City is planning a new north-south road (Port Drive) through the site to provide a new major access to the remaining port lands to the south. For the moment, the existing seaspan ship to land rail terminal and rail line will remain in place. However the city is in the process of working with Seaspan to assist with their relocation.

The EC is proposed on lands adjacent to Front Street and to the immediate south west of Port Drive. The main entries to the EC would be on Port Drive and Front Street. A service area for the facility would be at the western end of the facility where dedicated disabled parking would be located during events. A site plan that is based on the above now follows. A photo of the existing site and a preliminary in-progress visualization of the site with a new EC is on the next pages.



Not To Scale

The future uses on the new City lands to the north east of the EC are to be determined but will be compatible with the extension of the public waterfront to the south. The Waterfront Trail will as well be extended to the south. There are additional lands to the south west of the EC that can be used as deemed appropriate by the City.





Existing



Proposed

1 Port Drive Site Looking North West

IN PROGRESS

SITE EVALUATIONS

HOWARD & JOHNSON & 1 PORT DRIVE SITES

The common **POSITIVES & CHALLENGES** for the HJS and 1PDS are as follows:

Positives:

1. Large enough to accommodate the Event Centre and associated Entry Plaza and exterior service and logistics (tour truck and parking) area.
2. Prominent gateway entry locations to downtown; the HJS from the north and the 1PDS from the south.
3. Both sites are immediately adjacent to downtown and therefore have the following related advantages:
 - In the centre of the urban population (i.e. downtown) to maximize accessibility, attendance and ancillary economic benefits.
 - In proximity to other hospitality, retail and accommodation offerings to augment the overall event experience and maximize the ancillary economic benefits through additional “in-Nanaimo spending”.
 - A site with prominent exposure to maximize the positive impact of this major public project and to augment sponsorship revenues.
4. Significant available public parking within a 10 – 12 minute walk. This issue is discussed further on subsequent pages.
5. Sufficient space to combine the Event Centre with new complimentary development to make the overall development more exciting and successful. We note that the Event Centre will facilitate accelerated development on immediately adjacent lands.
6. Opportunity to continue the heritage of being important traditional First Nation meeting places.
7. Development of the Event Centre on either site will accelerate the improvement and/or extension of the adjacent Waterfront Trail and the visual and environmental rehabilitation of the adjacent shoreline.

Challenges:

1. Snuneymuxw First Nation (“SFN”) did exist on both sites along the original waterfront. Efforts will be need to be made by the city and SFN to address their interests. The protocol agreement working group which meets monthly and is currently engaging with them on this site and many others throughout the city, is the appropriate forum to discuss these issues.
2. Both sites have archaeological issues that will have to be addressed.
3. Both have existing underground services that will have to be relocated.

HOWARD JOHNSON SITE

Positives:

1. Site is in very close proximity to the adjacent Maffeo Sutton Park to which it is connected by the Waterfront Trail under Terminal Avenue to support and augment its extensive number of events between June and September. This and other new initiatives being discussed such as on Newcastle Island will establish a stronger year round north anchor to the downtown section of the Waterfront Trail.
2. The existing site is zoned for a multiuse spectator arena and the adjacent developments that the HJS owners are planning (except for the lands in the SW corner).
3. The HJS owners propose that major portions of their private sector development will occur immediately if the arena is built at this location.
4. Possible Comox Road dedications from the property should not impact the site's overall viability.

Challenges:

1. The significant on-site grade differential especially with respect to truck access and maneuvering and internal design will lead to additional costs and design challenges.
2. The completion of agreements between the public and private sectors for the overall development where different components will be under different ownership and/or controls and/or agreements will take time to conclude.
3. Immediately adjacent existing residential may challenge the development because of disruption to their neighborhood from the touring trucks and large numbers of people during events.
4. With the lack of updated environmental information, further environmental approvals will be required. Especially with respect to the acceptable building setbacks from the Millstone River.

1 PORT DRIVE SITE

Positives:

1. Agreements to secure City Ownership are complete.
2. Environmental approvals have been received to subdivide and create parcels from the BC Ministry of Environment.
3. A positive anchor to the south end of the existing Waterfront Trail.
4. In closer proximity to the Convention Centre to support its operations. Event Centres are often located adjacent to Convention Centres to augment the success of each other's operations.
5. Close to Port Theatre to support the creation of an Entertainment Arts and Culture district.
6. If and when the adjacent extended area of vacant port lands becomes available, the EC will be a catalyst to realize additional development including public attractions such as an IMAX, a 2nd ice rink and other private sector development.
7. It should support all or almost all of the December 2013 South Downtown Waterfront Initiative's Guiding Principles including having sufficient space for the 6 to 8 bus station initiative, whether in the lands to the south west or on Front St.
8. Because the trains only operate once or twice per week from Monday to Friday during normal business hours, the Event Centre will not require special acoustic mitigation.
9. A viable and successful design has been developed that will not require a large amount of on-site fill to be removed.
10. The following studies and reports have been completed which bring considerable certainty to the viability of this site:
 - An Archeological Inventory dated August 27, 2015
 - Detailed Site Investigation dated November 2015 ()
 - 1 Port Drive Summary Presentation dated September 19, 2016 ()

Challenges:

1. The sanitary sewer line that runs through the site will lead to additional costs.
2. The overall masterplanning including road and Waterfront Trail designations and rezoning will be required. This could take quite some time although these type of rezonings can be completed in a timely manner.

SUMMARY

As outlined on the previous pages, both the HJS and 1PDS sites have many common positives and advantages and a few challenges that require further work but we are confident can be overcome.

However, following our analysis, it is our opinion that the 1 Port Drive Site is the better site for the following reasons:

1. The City has secured its ownership of 1PDS while the negotiations for an agreement between the City and the HJ site to develop the EC on the HJS have just started.
2. The city will incur additional costs to secure new lands for the EC on the HJS.
3. While both sites should see some immediate adjacent development with the construction of the EC, the 1PDS should be a positive catalyst for much more development as the port lands to the south become available.
4. From experience, the operation of the EC with its large touring trucks departing in the middle of the night will probably create a long term conflict with existing and future immediately adjacent residents on the HJS.
5. While both sites have some design and construction challenges, we believe that the substantial grades of the HJS will prove to be more expensive to deal with.
6. The synergies of the EC being relatively close to the Convention Centre should definitely assist the greater utilization and success of both facilities.
7. The likelihood that a new centralized bus station will be located in the area of south downtown will assist with access and egress to the EC.

7. SCHEDULE & ESTIMATED DEVELOPMENT COSTS

With any EC that is the home of a WHL (or other hockey league) team it is very important to move into a new facility at the beginning of a new season, in other words in September after the building has been commissioned in August.

Therefore to open in September 2019; we recommend the following schedule:

January 2017	-	Commence Schematic Design (SD) and ongoing Cost Updates
April 2017	-	Turn over SD documents to Site Servicing Engineers to commence work
July 2017	-	Tender & Award of On-Site Services
August-November 2017	-	Complete On-Site Service Work
September 2017	-	Complete EC Bid Documents
October-November 2017	-	Tender & Award of EC
December 2017	-	Start EC Construction
July-August 2019	-	Complete EC Construction
August-September 2019	-	Commission Building

ESTIMATED DEVELOPMENT COSTS

The majority of the development costs are the construction costs which include:

- Base Cost for actual Construction materials & labour
- The Contractor's General Conditions
- On-Site Preparation and Work
- Design & Construction Contingencies

For this Phase 2 Study, BBB retained BTY Group, one of Canada's most successful and experienced Quantity Surveying & Cost Management consultancies. Their construction cost estimate (attached) for the Base Project is attached in this section and totals \$58.2M based on construction starting in December 2017. In addition, there are soft costs for:

- Professional fees and disbursements for architects, engineers, etc.
- Video Boards & Scoreboard
- Graphics, Signage & Art
- Loose furniture fixtures and equipment (FFE) including the Zamboni
- Testing & Inspection
- Pre-Opening Operating Expenses

BTY recommend an allowance that is 20% of the above construction cost is adequate, resulting in a soft cost allowance of \$11.6M.

Therefore the total development cost for the Base Project is \$69.8M

As outlined in Phase 1, this cost excludes:

- Land
- Parking that is in addition to the 100 spaces on-site in the Service Area
- Legal and Accounting
- Costs for municipal staff
- Building permits and service hook-up fees, etc.
- Financing
- Costs for services, roads and other infrastructure that aren't on the site
- Demolition

In Phase 1 several options were proposed by BBB including the following Options A & B:

Option A:

This option increases the EC's maximum capacity to 8,300 instead of 7,100 in the Base Project. The hockey capacity stays at 5700, the same as in the Base Project. This option requires 2,200m² (23,680sf) of additional related guest services, including multi-purpose rooms for recreation, meetings, community initiatives, etc. This would augment the facility use as a recreational/community centre 365 days per year. BTY agrees with BBB's proposal allowance of \$8M provided a 20% soft cost allowance is added for a total cost of \$9.6M.

Option B:

This option upgrades the exterior and interior architecture including the addition of a large covered exterior entry activation porch/ pavilion to make this a one-of-a-kind made-in-Nanaimo public assembly community centre. Again BTY agrees BBB's proposed allowance of \$6M to which a 20% soft cost allowance results in \$7.2M.

TOTAL Development Cost with Options A & B: \$86.6M.

Also in Phase 1 an additional option was brought forward that if the City wants to minimize the cost of the facility while still maximizing the opportunity to attract a WHL Team, we recommend a 5,000 to 5,200 seat facility that has minimal facilities to accommodate touring shows. Obviously many of the benefits discussed in Section 6 will not be realized. Because this option was not supported in the public engagement process, no additional work was completed.

We continue to propose that to assist in activating the Centre and the public spaces around the facility 365 days per year, additional retail, hospitality, etc. areas should be considered in the future provided that market research clearly indicates that these areas will secure rents from 3rd parties that will provide an acceptable payback or capital.

8. WHL

The Western Hockey League (WHL) is a major junior ice hockey league based in Western Canada and the Northwestern United States. Founded in 1966, the WHL is a member of the Canadian Hockey League, the world's premier player development league for the NHL. The WHL has 22 teams, in 4 divisions and 2 Conferences.

A Nanaimo team would play in the BC Division, which consists of Victoria, Kamloops, Vancouver, Prince George and Kelowna. The BC Division is part of the Western Conference along with the US Division, which includes Portland, Everett, Seattle, Spokane and Kennewick (Tri Cities). The WHL Regular Season schedule consists of 72 games in total, 36 at home. With pre-season, regular season and playoffs over 40 games each season will be played in the facility.

A WHL team would be an integral part of the business and sporting community in Nanaimo, attracting significant corporate support through sponsorship and advertising revenues while producing a very high level of hockey entertainment experience for its fans. The WHL is also a leading supplier to Canada's National Teams and Canadian University Hockey, including awarding over 350 WHL Scholarships to graduating players each year. As a member of the Canadian Hockey League (CHL), the team would participate in the development of high quality hockey talent who demonstrate leadership, commitment and passion for the game. The CHL is the number one feeder system to the NHL.

WHL training camps begin the last week in August and teams will usually play 6 exhibition games (3 home/3 away) prior to the season opening. The regular season runs from the third week in September to the third week in March. 72% of all games are played on weekends, holidays and the Christmas break. The playoffs begin within days after the regular season ends and run until mid-May.

The latest a team will play is in the last week of May at the Memorial Cup, the CHL championship, which is in a different host CHL city each year. WHL games are broadcast on Rogers Sportsnet, Sportsnet One and Shaw TV. All WHL facilities are municipally owned except Kelowna. As much as the WHL has had a very long and successful history, it is not the lucrative business that many people believe it to be. While a franchise costs an owner many millions, the average gross revenues usually exceed the average operating costs by an amount that delivers an average ROI that is not attractive.

The WHL is one of the most stable leagues in hockey with only 2 team relocations in the past 24 years and with no team ever becoming insolvent or going into bankruptcy. As well, no WHL team has ever received a "bailout" by their City in order to stay in business.

Overview of How the WHL Will Benefit Nanaimo

A WHL team in Nanaimo would be a significant entertainment attraction and would arguably be the “biggest game in town”.

MNP have conducted an Economic Impact Study and their report is in Section 10, Economic and Community Impacts.

- Ticket sales.
- Billet family expenses.
- Spending at games by spectators including player family members.
- Tourism and spending before/after games by visiting spectators, NHL scouts, TV broadcasters and crews, players and their families during regular season games, playoffs/tournaments, camps and special events.
- Corporate sponsorships.
- A WHL franchise will create civic pride, essentially putting the city “on the map.” Cities with a WHL team may be viewed as a “major” city.
- Local and regional advertising done by the team.
- A local WHL sports team may create benefits for fans who never attend a single game. Fans may follow the franchise in the media and discuss the franchise with friends, family and coworkers. This is a benefit that is difficult to quantify in standard economic terms.
- Salaries and wages for coaches and support staff.
- Nanaimo will be in the news and paid and unpaid media more often, raising Nanaimo’s exposure and awareness of this exciting destination by those living outside the region.
- The WHL will make Nanaimo a more interesting place to live there by attracting an expanding workforce and new companies.

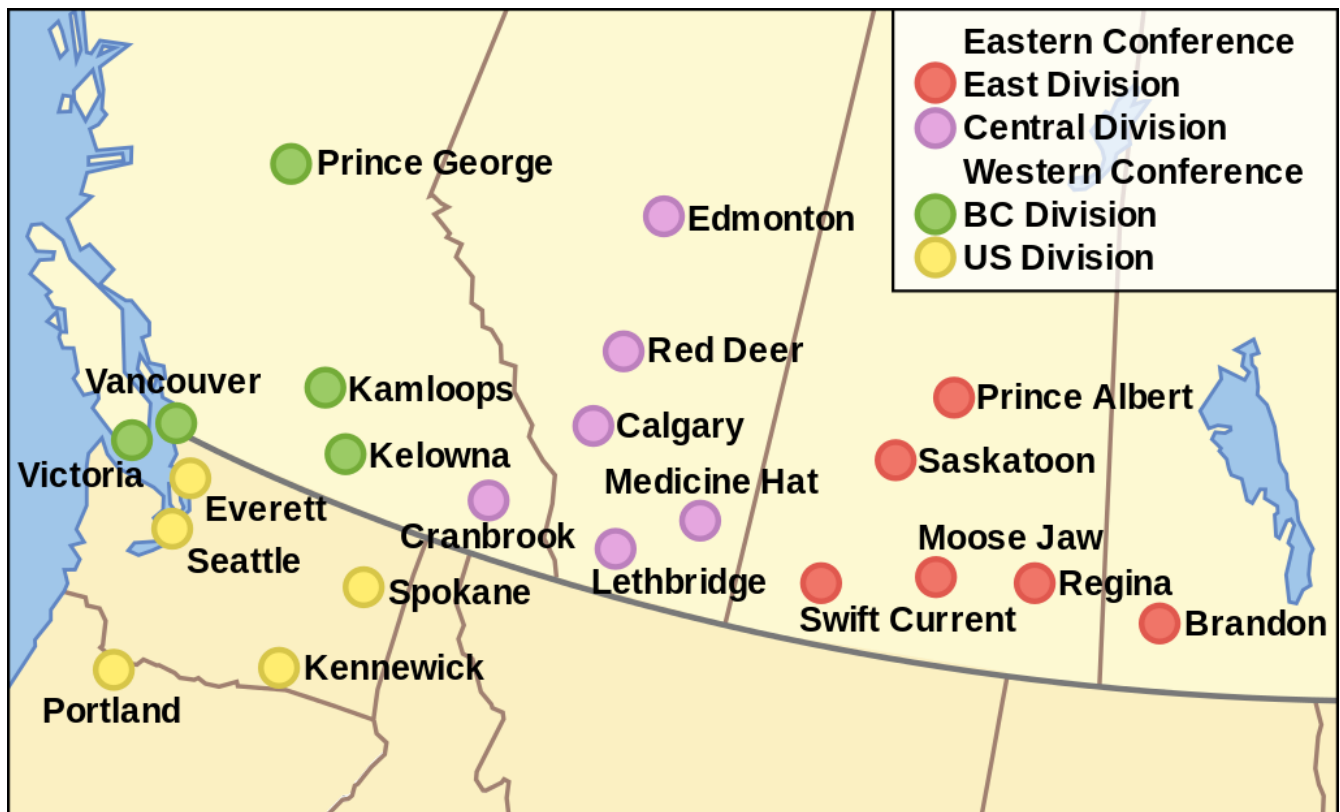
As well, a WHL Franchise will have the following social benefits:

- Community outreach programs, i.e. school reading and mentorship.
- Charitable activities.
- Minor hockey involvement.
- Opportunity for encouraging local youth to develop their skills and potentially play at the CHL, University or professionally levels.
- Many of the players that are transferred to the area from other cities specifically to play for the team, often stay or return after their career success.
- Games provide the community with quality locally based family entertainment.

Key Data:

- 4,500 per game League attendance average during 2014-15 and 2015-16 WHL Regular Seasons.
- 22 WHL member Clubs; 17 in Western Canada and 5 in the U.S. Pacific Northwest with dedicated local media coverage in all markets and regular national coverage
- 55+ game WHL regional broadcast schedule with Shaw Communications
- 50 game CHL national broadcast schedule with Rogers Sportsnet
- All WHL games (792 regular season, approx. 100 playoffs) available online via WHL Live
- \$3.9 million contributed by WHL teams to minor hockey and community charities in 2015-16

On the following pages is the WHL Introductory Overview, which the league has provided and given us permission to include in this study.



Map of WHL Team Locations

10. Economic & Community Impacts

INTRODUCTION IN PROGRESS

Economic Impact of a Proposed Nanaimo Event Centre
Prepared for Brisbin Brook Beynon Architects
December 2016

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1. EXECUTIVE SUMMARY

Introduction

Brisbin Brook Beynon Architects (“BBB Architects”) engaged MNP to quantify and describe the potential economic impacts that may arise from the construction and operation of an Event Centre in Nanaimo. The scope of MNP’s work included:

- Estimates of the economic impacts of the construction and operation of an Event Centre in Nanaimo using an input-output model.
- A description of the potential economic benefits that may be associated with visitors that come to Nanaimo to attend events at the Event Centre.
- A description of the potential economic and community benefits of a Western Hockey League (“WHL”) team being based out of the Event Centre.

Economic Impact Assessment

The proposed Event Centre is anticipated to be approximately 160,000 square feet. Its anticipated seating capacity is approximately 5,700, with a concert spectator capacity of between 7,100 and 8,300. It may also include gathering places and meeting rooms to support a range of events and uses. Events that may be hosted at the facility include WHL hockey games, touring shows, community banquets, festivals, graduations, religious events, conventions, and other sporting events.

As part of the study two design options were assessed:

- The Base Project has hockey spectator capacity of approximately 5,700 and concert spectator capacity of 7,100. The estimated development expenditure for this option is \$69 million.
- The Recommended Facility has a larger concert spectator capacity of 8,300 and upgrades to the exterior and interior architecture.¹ The estimated development expenditure for this option is \$84 million.

Approximately 30 percent of materials and 75 percent of labour during development is expected to be sourced locally.²

Table A shows the estimated economic impacts of development for the Base Project and Table B shows the estimated economic impacts of development for the Recommended Facility.

¹ BBB Architects, “Event Centre Study”, October 24, 2016.

² Ibid.

Table A: Economic Impacts of Development of the Base Project (\$ in millions)

	Output	GDP	Employment (FTEs)	Federal Tax	Provincial Tax	Municipal Tax
Direct	\$69.00	\$28.96	384	\$3.67	\$2.13	\$0.00
Indirect & Induced	\$51.39	\$30.36	321	\$3.75	\$2.72	\$0.86
Total	\$120.39	\$59.32	705	\$7.42	\$4.85	\$0.86

Table B: Economic Impacts of Development of the Recommended Facility (\$ in millions)

	Output	GDP	Employment (FTEs)	Federal Tax	Provincial Tax	Municipal Tax
Direct	\$84.00	\$35.26	468	\$4.46	\$2.60	\$0.00
Indirect & Induced	\$62.56	\$36.96	391	\$4.56	\$3.31	\$1.04
Total	\$146.56	\$72.22	859	\$9.02	\$5.91	\$1.04

The annual operating expenditures of the proposed Event Centre are estimated to be approximately \$2.9 million and are expected to be the same for both design options. In addition to the facility operating expenditures there are expected to be expenditures of approximately \$1.5 million for operation of the concessions and approximately \$1.95 million associated with a WHL team based in Nanaimo.

Table C shows the estimated economic impacts of the expenditures that are expected to be associated with the operation of the proposed Event Centre including the concessions and the expenditures that are expected to be associated with a WHL team based in Nanaimo. The majority of these impacts may be expected to be realized in the Nanaimo area.

Table C: Annual Economic Impacts of the Operation of the Proposed Event Centre (\$ in millions)

	Output	GDP	Employment (FTEs)	Federal Tax	Provincial Tax	Municipal Tax
Operation of the Event Centre (Annual)						
Direct	\$3.86	\$2.16	45	\$0.26	\$0.14	\$0.00
Indirect & Induced	\$3.26	\$2.03	21	\$0.25	\$0.19	\$0.07
Total	\$7.12	\$4.19	66	\$0.51	\$0.33	\$0.07
WHL Team Including Spending by Visiting Team (Annual)						
Direct	\$1.92	\$1.09	32	\$0.13	\$0.06	\$0.00
Indirect & Induced	\$1.49	\$0.92	9	\$0.11	\$0.09	\$0.03
Total	\$3.41	\$2.01	41	\$0.24	\$0.15	\$0.03
Total Annual Impacts						
Direct	\$5.78	\$3.25	77	\$0.39	\$0.20	\$0.00
Indirect & Induced	\$4.75	\$2.95	30	\$0.36	\$0.28	\$0.10
Total	\$10.52	\$6.20	107	\$0.75	\$0.48	\$0.10

Additional economic impacts may be expected to arise from the expenditure of out-of-town visitors attending events at the Event Centre, expenditure by touring shows and expenditures associated with WHL playoff games hosted in Nanaimo. These expenditures are expected to be primarily related to food and accommodation and most impacts are expected to arise from overnight visitors. Every thousand overnight visitors that stay in paid accommodations are estimated to generate impacts of approximately:

- \$0.25 million in economic output in BC.
- \$0.15 million in GDP in BC.
- \$0.035 million in revenue for all three levels of government.
- 2.1 FTEs of total employment.

If the proposed Event Centre is able to attract 27,000 overnight visitors each year that stay in paid accommodation, the spending in Nanaimo by those visitors may be expected to be approximately \$3.9 million. Spending of \$3.9 million is estimated to generate the following economic impacts:

- \$6.75 million in economic output.
- \$4.05 million in GDP in BC.
- \$0.95 million in revenues for all three levels of government.
- 40.5 FTEs of direct employment and 57 FTEs of total employment.

The majority these impacts may also be expected to be realized in the Nanaimo area.

Other Community Benefits

In addition to the economic impacts of the Event Centre the facility may also provide other community and social benefits. These include an enhanced quality of place (also known as quality of life) for local residents, an enhanced community profile and an increase in the number of local businesses.

2. INTRODUCTION

Background and Purpose

The City of Nanaimo engaged Brisbin Brook Beynon Architects (“BBB Architects”) to conduct a study to assess the costs and benefits that may be associated with the development of an Event Centre in Nanaimo, BC. The scope of the study included an assessment of the potential economic impacts of the construction and operation of the proposed facility.

BBB Architects engaged MNP to quantify and describe the potential economic impacts that may arise from the construction and operation of an Event Centre in Nanaimo.

Scope

The scope of this report included:

- Estimates of the economic impacts of the construction and operation of an Event Centre in Nanaimo using an input-output model.
- A description of the potential economic benefits that may be associated with visitors that come to Nanaimo to attend events at the Event Centre.
- A description of the potential economic and community benefits of a Western Hockey League (“WHL”) team being based out of the Event Centre.

Approach

In preparing this report, MNP carried out the following activities:

- Gathered estimates of construction and operating expenditures for the proposed Event Centre and a WHL team from BBB Architects.
- Gathered information from publicly available sources on the economic impacts of WHL teams and visitor expenditures.
- Developed economic impact models to estimate the impacts of the construction and operation of the proposed Event Centre.

Structure of the Report

The remainder of the report is organized as follows:

- Section 3 provides a description of the methodology and data sources used in the study.
- Section 4 contains estimates of the economic impacts of the construction and operation of the proposed Event Centre.
- Section 5 contains a description of the community and social benefits that may be associated with the proposed Event Centre.

Limitations

This report is provided for information purposes and is intended for general guidance only. MNP has relied upon the completeness, accuracy and fair presentation of all information and data obtained from BBB Architects and public sources, believed to be reliable. The accuracy and reliability of the findings and opinions expressed in the presentation are conditional upon the completeness, accuracy and fair presentation of the information underlying them.

The findings and opinions expressed in the report constitute judgments as of the date of the presentation, and are subject to change without notice. MNP is under no obligation to advise of any subsequent change brought to its attention that would alter those findings or opinions.

The economic analysis contained in the report is based upon projections, founded on past events giving an expectation of certain future events. Future events are not guaranteed to follow past patterns and results may vary, even significantly.

3. METHODOLOGY

Economic Impact Methodology

To estimate the economic impacts of the proposed Event Centre, MNP employed an input-output methodology that uses economic multipliers published by Statistics Canada.

Input-output modeling is a widely-used and widely-accepted approach, making it recognizable by many different stakeholders and audiences. The structure of the approach also facilitates easy comparisons between reported results for different projects and facilities.

In general, economic impacts are viewed as being restricted to quantitative, well-established measures of economic activity. The most commonly used of these measures are output, GDP, government tax revenue, and employment:

- **Output** is the total gross value of goods and services produced by a given company or industry measured by the price paid to the producer. This is the broadest measure of economic activity.
- **Gross Domestic Product (“GDP”)**, or value added, refers to the additional value of a good or service over the cost of inputs used to produce it from the previous stage of production. Thus, GDP is equal to the unduplicated value of goods and services produced.

- **Employment** is the number of jobs created. Employment is measured in terms of full-time equivalents (“FTEs”). One FTE may be considered one person-year of employment. That is, one FTE is the equivalent of one person working full-time for a period of one year.
- **Labour Income** refers to the salaries and wages for the FTE jobs created.
- **Government Tax Revenues** are the total amount of tax revenues generated for different levels of government. Tax revenues arise from personal income taxes, corporate income taxes, taxes on products, and taxes on production. Please note that because tax revenues can frequently change due to modifications in tax policy, the tax revenue impacts in this report are estimates only and subject to change. They should be viewed as approximate in nature.

Economic impacts may be estimated at the direct, indirect, and induced levels.

- **Direct impacts** are due to changes to “front end” businesses that would initially receive operating revenue as a direct consequence of the operations and activities of a facility or industry.
- **Indirect impacts** arise from changes in activity for suppliers of the “front end” businesses.
- **Induced impacts** arise from shifts in spending on goods and services as a consequence of changes to the payroll of the directly and indirectly affected businesses.

Data Sources

A combination of information provided by BBB Architects and information gathered from publicly available sources was used in the study. The information provided by BBB Architects included the expenditures associated with the construction and operation of the proposed Event Centre, expenditures associated with the operation of a WHL team and the expected number of event attendees. Publicly available sources were used for information on visitor expenditures and supplemental information related to the operation of Event Centres and WHL teams.

4. ECONOMIC IMPACT ANALYSIS

The impacts associated with an Event Centre arise from a variety of sources and may be felt within and beyond the local community. Event Centres contribute directly to local economies through their operations and the visitors that they help attract. In addition, Event Centres support the current cultural assets within a community, create opportunities to raise the profile of the community, promote interest in sport, arts and culture, and positively contribute to the overall quality of place (often referred to as quality of life).

The proposed Event Centre is anticipated to be approximately 160,000 square feet. Its anticipated seating capacity is approximately 5,700, with a concert spectator capacity of between 7,100 and 8,300. It may also include gathering places and meeting rooms to support a range of events and uses. Events that may be hosted at the facility include WHL hockey games, touring shows, community banquets, festivals, graduations, religious events, conventions, and other sporting events.

Economic Impacts of Development

Expenditures associated with the development phase of the proposed Event Centre are expected to generate positive economic impacts through direct expenditures on goods and services, the generation of employment, and the generation of tax revenues for local, provincial, and federal governments. These impacts are expected to occur both in Nanaimo and in other parts of BC.

Two options for the design of the proposed Event Centre are being considered. The Base Project has hockey spectator capacity of approximately 5,700 and concert spectator capacity of 7,100 while the Recommended Facility has a larger concert spectator capacity of 8,300 and upgrades to the exterior and interior architecture.³

Base Project

The development expenditure for the Base Project is estimated to be approximately \$69 million. These expenditures include:

- Site preparation (including demolition and provision of on-site services).
- Construction.
- Furniture, fixtures, and equipment.
- Graphics, signage, and art.
- Scoreboards.
- Professional fees including legal, architectural, engineering, project management, accounting, etc.
- Geotechnical and soil analysis.
- Testing and inspections.
- Marketing and collateral public relations.
- Insurance including for bonding, builder's risk, general liability, and professional liability.
- Pre-opening operating expenses.
- Contingency and miscellaneous expenses.

Approximately 30 percent of materials and 75 percent of construction labour is expected to be sourced locally.⁴

Table 1 shows the estimated economic impacts of development, based on development expenditures of \$69 million. During development the Base Project may be expected to generate approximately:

- \$120.39 million in economic output in BC.
- \$59.32 million in GDP in BC.
- \$13.13 million in revenue for all three levels of government.
- 384 FTEs of direct employment and 705 FTEs of total employment.

³ BBB Architects, "Event Centre Study", October 24, 2016.

⁴ Ibid.

Table 1: Estimated Economic Impacts of Development of the Base Project (\$ in millions)

	Output	GDP	Employment (FTEs)	Federal Tax	Provincial Tax	Municipal Tax*
Direct	\$69.00	\$28.96	384	\$3.67	\$2.13	\$0.00
Indirect & Induced	\$51.39	\$30.36	321	\$3.75	\$2.72	\$0.86
Total	\$120.39	\$59.32	705	\$7.42	\$4.85	\$0.86

*It is important to note that direct municipal taxes for construction are generated from permits and fees. The City of Nanaimo is the proponent of the Events Centre so there are not expected to be permit and fee levies associated with the construction.

Recommended Facility

The development expenditure for the Recommended Facility is estimated to be approximately \$84 million and includes the same categories of expenditure as the Base Project. Approximately 30 percent of materials and 75 percent of construction labour is expected to be sourced locally.

Table 2 shows the estimated economic impacts of development of the Recommended Facility, based on development expenditures of \$84 million. During development the Recommended Facility may be expected to generate approximately:

- \$146.56 million in economic output in BC.
- \$72.22 million in GDP in BC.
- \$15.97 million in revenue for all three levels of government.
- 468 FTEs of direct employment and 859 FTEs of total employment.

Table 2: Estimated Economic Impacts of Development of the Recommended Facility (\$ in millions)

	Output	GDP	Employment (FTEs)	Federal Tax	Provincial Tax	Municipal Tax*
Direct	\$84.00	\$35.26	468	\$4.46	\$2.60	\$0.00
Indirect & Induced	\$62.56	\$36.96	391	\$4.56	\$3.31	\$1.04
Total	\$146.56	\$72.22	859	\$9.02	\$5.91	\$1.04

Economic Impacts of Operations

Annual expenditures on the operation of the proposed facility are expected to generate positive economic impacts through direct expenditures on goods and services, the employment of management and operations staff, and the generation of tax revenues for local, provincial, and federal governments.

Table 3 shows the estimated annual operating expenditures associated with the facility. These operating expenditures are based on the third year of operations and the following assumptions:

- The facility will host 126 events per year, including 39 WHL games and 32 touring shows.
- There are 20 full-time positions and 133 part-time positions at the facility. This includes operational staff, facilities maintenance, security, and event services staff but does not include staff associated with a WHL team, touring shows, or specific conventions and festivals.

Please note that management fees for a professional venue management company are not included in the expenditures outlined in Table 3.

Table 3: Estimated Operating Expenditures

Category of Expenditure	Expenditure
Facility Operations	
<i>Wages and Benefits</i>	\$1,700,000
<i>Utilities</i>	\$255,000
<i>Building Supplies</i>	\$160,000
<i>Contracted Services</i>	\$130,000
<i>Repairs & Maintenance</i>	\$100,000
<i>Professional Fees</i>	\$65,000
<i>Other</i>	\$485,000
Total Operations	\$2,900,000
Concessions	
Food, Beverage & Retail	\$1,500,000
Total Operating	\$4,311,000

Source: BBB Architects

Table 4 shows the estimated annual economic impacts associated with the operation of the proposed Event Centre, based on the expenditures listed in Table 3. The operation of the proposed facility may be expected to generate approximately:

- \$7.12 million in economic output in BC.
- \$4.19 million in GDP in BC.
- \$0.91 million in revenue for all three levels of government.
- 45 FTEs of direct employment and 66 FTEs of total employment.

The majority these impacts may be expected to be realized in the Nanaimo area.

Table 4: Estimated Annual Economic Impacts of Operations (\$ in millions)

	Output	GDP	Employment (FTEs)	Federal Tax	Provincial Tax	Municipal Tax*
Direct	\$3.86	\$2.16	45	\$0.26	\$0.14	\$0.00
Indirect & Induced	\$3.26	\$2.03	21	\$0.25	\$0.19	\$0.07
Total	\$7.12	\$4.19	66	\$0.51	\$0.33	\$0.07

*It is important to note that direct municipal taxes from operations are generated from property taxes. The City of Nanaimo is the proponent so there are not expected to be municipal taxes generated from the facility.

Visitors

Spending by out-of-town visitors attending events at the Event Centre will have a different impact than that of Nanaimo residents who attend events. Expenditure by out-of-town visitors creates incremental economic activity while expenditure by Nanaimo residents would likely have occurred in the region regardless of whether it was spent on a visit to the Events Centre or not. Thus, expenditure by Nanaimo residents is considered to be a re-allocation of expenditure rather than an incremental expenditure. As a result, our discussion of the impacts of visitor spending is restricted to those visitors from outside of Nanaimo as this best represents the potential incremental economic impact Events Centre attendees may have on the local economy.

For the purposes of this study, visitors are defined as those Event Centre attendees that live outside of the Nanaimo Regional District. According to BBB Architects there are expected to be approximately 150,000 out-of-town visitors attending events at the Event Centre each year. Some of these visitors may be expected to stay overnight in Nanaimo while others may be expected to be same-day visitors. Those staying overnight may stay with friends and family or in paid accommodations. Visitors staying in paid accommodations are expected to have higher expenditures and consequently greater economic impacts than either visitors staying with family and friends or same-day visitors.

There was no information available on the number of overnight visitors that may be expected to attend events at the Event Centre or how many overnight visitors may be expected to stay in paid accommodations. To illustrate the potential impact of overnight visitors, we developed estimates of the economic impact per thousand overnight visitors staying in paid accommodations. Table 5 shows the estimated annual expenditures per thousand overnight visitors staying in paid accommodations.

Table 5: Estimated Expenditure per Thousand Overnight Visitors Staying in Paid Accommodations

	Estimate
Number of Room Nights	500
Average Cost of Accommodation⁵	\$112/room night
Estimated Expenditure on Food (Excluding Expenditures at the Event Centre)	\$44,000
Estimated Expenditure on Transportation	\$45,000
Total Expenditure	\$145,000

⁵ Destination BC, "Tourism Indicators", May 2016

Approximately 70 percent of the expenditure of overnight visitors is expected to be on food and accommodation, making visitors drawn by the Event Centre a potential source of income for restaurants and hotels in Nanaimo, particularly during the winter months when visitor numbers tend to be lower.

Table 6 shows the estimated annual economic impacts of spending per thousand overnight visitors that may be associated with the proposed Event Centre. This spending may be expected to generate approximately:

- \$0.25 million in economic output in BC.
- \$0.15 million in GDP in BC.
- \$0.035 million in revenue for all three levels of government.
- 2.1 FTEs of total employment.

Table 6: Estimated Economic Impacts of Spending per Thousand Overnight Visitors (\$ in millions)

	Output	GDP	Employment (FTEs)	Federal Tax	Provincial Tax	Municipal Tax
Direct	\$0.15	\$0.09	1.5	\$0.010	\$0.008	\$0.002
Indirect & Induced	\$0.10	\$0.06	0.6	\$0.007	\$0.006	\$0.002
Total	\$0.25	\$0.15	2.1	\$0.017	\$0.014	\$0.004

A 2010 study of the economic impact of the Kelowna Rockets found that approximately nine percent of spectators were visitors and stayed overnight in Kelowna.⁶ Assuming a similar share of event attendees in Nanaimo are overnight visitors that stay in paid accommodations and that there are approximately 300,000 people that attend events at the Event Centre, approximately 27,000 people may be expected to stay overnight in Nanaimo each year as a result of the Event Centre. Assuming total expenditure per thousand overnight visitors is \$145,000 (see Table 4), the spending by overnight visitors is estimated to be approximately \$3.9 million annually and this spending may be expected to generate the following economic impacts:

- \$6.75 million in economic output.
- \$4.05 million in GDP in BC.
- \$0.95 million in revenues for all three levels of government.
- 40.5 FTEs of direct employment and 57 FTEs of total employment.

The majority of these impacts may be expected to be realized in the Nanaimo area.

It is important to note that expenditure by same-day visitors may be expected to create additional economic impacts; however, this is expected to be relatively small and these impacts have not been included.

⁶ Carlaw, Kenneth and Brett Crowe. "Economic and Social Impacts Assessment of the Kelowna Rockets on the City of Kelowna, 2009-2010 Season".

WHL Team

WHL teams provide a number of economic and social benefits to the communities in which they play. These benefits arise from the ongoing operations of the team, the role the team plays in drawing visitors to the community, and the team's engagement with the community through charitable and volunteer activities.

Team Operations

A WHL team is akin to a small business that employs between 20 and 40 people. The operation of a team typically involves three separate but related functional areas.

These are:

- Front Office – the front office is responsible for overall management, sales and marketing, and administration of the team. Positions in the front office are based in the team's home community.
- Coaching and Training – coaching and training is responsible for the on ice product. Staff are based in the team's home community, but may not reside there year round.
- Scouting – scouting is responsible for scouting and recruiting players. Scouts are based in different regions.

In addition to the permanent staff there are also a number of professionals that provide support services to the team. These include physicians, physiotherapists, chiropractors, and sports psychologists.

The operating budget for a WHL team is between approximately \$2.5 million and \$3 million per year. This includes expenditures on staff salaries, player costs, facility rental, marketing and advertising, equipment, transportation, and travel. Much of this spending occurs in the team's home community.

Table 7 shows the estimated annual expenditures of a WHL team based in Nanaimo. A Nanaimo-based WHL team may be expected to spend approximately \$0.8 million in salaries and benefits and an additional \$1.8 million on operations. Approximately 69 percent of this is may be expected to be spent in the Nanaimo area. The expenditures that may be expected to occur outside of Nanaimo include travel expenses, equipment, and merchandise.

Table 7: Estimated Operational Expenditure of a Nanaimo-based WHL team

Category of Expenditure	Total Expenditure	Share in Nanaimo
<i>Salaries & Benefits</i>	\$826,500	100%
<i>Equipment & Merchandise</i>	\$303,200	0%
<i>Rink Rental</i>	\$262,900	100%
<i>Player Expenses</i>	\$235,300	67%
<i>Travel Expenses</i>	\$200,000	0%
<i>Advertising/Marketing</i>	\$177,000	100%
<i>Game Day Production Costs</i>	\$131,900	100%
<i>Other</i>	\$498,500	52%
Total	\$2,635,300	69%

Table 8 shows the estimated annual economic impacts of a WHL team’s expenditure in Nanaimo. A WHL team’s expenditure may be expected to generate approximately:

- \$3.05 million in economic output in BC.
- \$1.80 million in GDP in BC.
- \$0.38 million in revenue for all three levels of government.
- 30 FTEs of direct employment and 38 FTEs of total employment.

Table 8: Estimated Annual Impacts of a Nanaimo-based WHL team (\$ in millions)

	Output	GDP	Employment (FTEs)	Federal Tax	Provincial Tax	Municipal Tax*
Direct	\$1.71	\$0.97	30	\$0.117	\$0.051	\$0
Indirect & Induced	\$1.34	\$0.83	8	\$0.103	\$0.080	\$0.029
Total	\$3.05	\$1.80	38	\$0.220	\$0.131	\$0.029

*It is important to note that direct municipal taxes from a WHL team are generated from property taxes paid for their facilities. The City of Nanaimo will be the landlord of the Events Centre so there will be no property taxes assessed against the facility.

In addition to the operational impacts of the team, there may be expected to be impacts from the expenditure of visiting teams. Over the course of the regular season, WHL teams host approximately 39 games. To estimate the potential economic impact of expenditure by visiting teams in Nanaimo, we used information on the number of visiting teams and length of stay from a study of the economic impact of the Kelowna Rockets⁷ and information on average hotel costs in Nanaimo and expenditure on food and accommodation from Destination BC⁸. As shown in Table 9, visiting teams may be expected to spend approximately \$0.21 million in Nanaimo on food and accommodations during the regular season.

Table 9: Estimated Spending By Visiting Team, Regular Season

Category	Estimate
<i>Number of Nights Visiting Teams Spend in Nanaimo</i>	60
<i>Number of Rooms per Team per Visit</i>	20
<i>Total Room Nights During the Regular Season</i>	1,200
<i>Average Daily Room Rate</i>	\$112
Total Estimated Expenditure on Accommodations	\$134,400
Total Estimated Expenditure on Food	\$71,500
Total Expenditure by Visiting Teams During the Regular Season	\$205,900

⁷ Carlaw, Kenneth and Brett Crowe. “Economic and Social Impacts Assessment of the Kelowna Rockets on the City of Kelowna, 2009-2010 Season”.

⁸ Destination BC, “Tourism Indicators May 2016”.

Table 10 shows the estimated annual economic impacts of spending by visiting teams in Nanaimo. Spending by visiting teams in Nanaimo may be expected to generate approximately:

- \$0.36 million in economic output in BC.
- \$0.21 million in GDP in BC.
- \$0.053 million in revenue for all three levels of government.
- 2 FTEs of direct employment and 3 FTEs of total employment.

Table 10: Estimated Annual Economic Impacts of Spending by Visiting Teams (\$ in millions)

	Output	GDP	Employment (FTEs)	Federal Tax	Provincial Tax	Municipal Tax
Direct	\$0.21	\$0.12	2	\$0.015	\$0.011	\$0.004
Indirect & Induced	\$0.15	\$0.09	1	\$0.011	\$0.009	\$0.003
Total	\$0.36	\$0.21	3	\$0.026	\$0.020	\$0.007

Community Engagement

In addition to the economic impacts associated with their operations, WHL teams are typically active participants in community programs and support local charities. Examples of the types of community engagement activities teams in other markets have undertaken include:

- Educational and informational community service work at schools and community centres.
- Meet and greet appearances at special events and family skates.
- Presentations to high school students about the dangers of alcohol and substance abuse.

Summary of Economic Impacts

The construction and operation of the Event Centre and the presence of a WHL team may be expected to create positive economic impacts through the expenditure on goods and services, the provision of employment and the generation of tax revenues for local, provincial and federal governments. Table 11 summarizes the estimated economic impacts of the proposed Event Centre. The one time impacts associated with the construction of the facility may be expected to be in the range of:

- Approximately \$120.39 million to \$146.56 million in economic output in BC.
- Approximately \$59.32 million to \$72.22 million in GDP in BC.
- Approximately \$13.1 million to \$15.97 million in revenue for all three levels of government.
- Approximately 384 FTEs to 468 FTEs of direct employment and 705 FTEs to 859 FTEs of total employment.

Ongoing operations of the facility and a WHL team may be expected to generate annual impacts of approximately:

- \$10.52 million in economic output in BC.
- \$6.2 million in GDP in BC.
- \$1.33 million in revenue for all three levels of government.
- 77 FTEs of direct employment and 107 FTEs of total employment.

Table 11: Summary of Estimated Economic Impacts of the Proposed Event Centre (\$ in millions)

	Output	GDP	Employment (FTEs)	Federal Tax	Provincial Tax	Municipal Tax
Construction of Base Project (One time)						
Direct	\$69.00	\$28.96	384	\$3.67	\$2.13	\$0.00
Indirect & Induced	\$51.39	\$30.36	321	\$3.75	\$2.72	\$0.86
Total	\$120.39	\$59.32	705	\$7.42	\$4.85	\$0.86
Construction of Recommended Facility (One time)						
Direct	\$84.00	\$35.26	468	\$4.46	\$2.60	\$0.00
Indirect & Induced	\$62.56	\$36.96	391	\$4.56	\$3.31	\$1.04
Total	\$146.56	\$72.22	859	\$9.02	\$5.91	\$1.04
Operation of the Event Centre (Annual)						
Direct	\$3.86	\$2.16	45	\$0.26	\$0.14	\$0.00
Indirect & Induced	\$3.26	\$2.03	21	\$0.25	\$0.19	\$0.07
Total	\$7.12	\$4.19	66	\$0.51	\$0.33	\$0.07
WHL Team Including Spending by Visiting Team (Annual)						
Direct	\$1.92	\$1.09	32	\$0.13	\$0.06	\$0.00
Indirect & Induced	\$1.49	\$0.92	9	\$0.11	\$0.09	\$0.03
Total	\$3.41	\$2.01	41	\$0.24	\$0.15	\$0.03
Total Annual Impacts						
Direct	\$5.78	\$3.25	77	\$0.39	\$0.20	\$0.00
Indirect & Induced	\$4.75	\$2.95	30	\$0.36	\$0.28	\$0.10
Total	\$10.52	\$6.20	107	\$0.75	\$0.48	\$0.10

Additional economic impacts may be expected to arise from the expenditure of out-of-town visitors attending events at the Event Centre, expenditure by touring shows and expenditures associated with WHL playoff games hosted in Nanaimo. These expenditures are expected to be primarily related to food and accommodation and most impacts are expected to arise from overnight visitors. Every thousand overnight visitors that stay in paid accommodations may be expected to generate impacts of approximately:

- \$0.25 million in economic output in BC.
- \$0.15 million in GDP in BC.
- \$0.035 million in revenue for all three levels of government.
- 2.1 FTEs of total employment.

If the proposed Event Centre is able to attract 27,000 overnight visitors each year that stay in paid accommodation, the spending in Nanaimo by those visitors may be expected to be approximately \$3.9 million. Spending of \$3.9 million is estimated to generate the following economic impacts:

- \$6.75 million in economic output.
- \$4.05 million in GDP in BC.
- \$0.95 million in revenues for all three levels of government.
- 40.5 FTEs of direct employment and 57 FTEs of total employment.

The majority these impacts may be expected to be realized in the Nanaimo area.

5. COMMUNITY AND SOCIAL BENEFITS

In addition to generating economic impacts, the proposed Event Centre may create other community and social benefits. These include:

- **Enhanced Quality of Place** – An Event Centre could offer a variety of activities for local residents, which may make Nanaimo a more attractive and enjoyable place to reside. This may support efforts to attract and retain new businesses and skilled labour.
- **Enhanced Community Image** – Marketing of events through television, radio, and other media coverage may increase Nanaimo's profile and visibility. This may increase levels of civic pride and contribute to increased tourist visits.
- **Local Business Development** – New businesses aimed at providing services to those attending events often open near event centres. These businesses typically include restaurants, bars, and hotels. If the proposed Event Centre is able to attract a significant number of overnight visitors to the region, there may be an expansion of hotel capacity in Nanaimo.

APPENDIX A: ABOUT MNP

MNP is the fastest growing major chartered accountancy and business advisory firm in Canada. Founded in 1945, MNP has grown to more than 70 offices and 3,000 team members across Canada. In British Columbia, MNP has more than 700 staff located in 19 offices throughout the province. The map below shows our office locations.

MNP provides a wide range of accounting, finance and business advisory services to clients. These include:

- Assurance
- Taxation
- Corporate Finance
- Mergers and Acquisitions
- Enterprise Risk Services
- Forensic Accounting
- Consulting
- Insolvency and Corporate Recovery
- Succession
- Valuations and Litigation Support



About MNP's Economics and Research Practice

Economic and industry studies are carried out by MNP's Economics and Research practice. Based in Vancouver, the Economics and Research practice consists of a team of professionals that has a successful track record of assisting clients with a wide variety of financial and economic impact studies. Our work has encompassed a wide range of programs, industries, company operations and policy initiatives, and has helped clients with decision-making, communication of economic and financial contributions, documentation of the value of initiatives and activities, and development of public policy.

Section 11 Funding

Section 12 NEXT STEPS