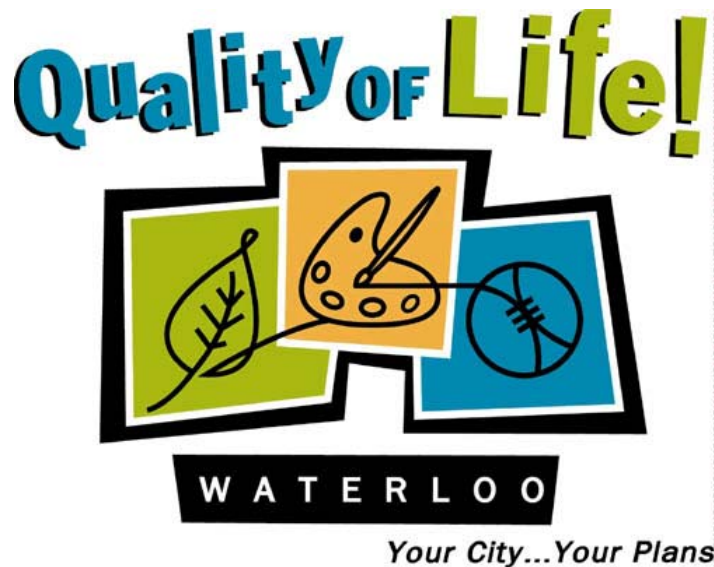


THE CORPORATION OF THE CITY OF WATERLOO

RECREATION AND LEISURE SERVICES



**MASTER PLAN
APPROVED NOVEMBER 17, 2008
VERSION 10**



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1.0 INTRODUCTION

1.1 City of Waterloo

The City of Waterloo is a municipality of approximately 100,000 residents. It was one of the original settlements within the County of Waterloo. Today it is one of seven municipalities, including one of three cities, that constitute the Region of Waterloo with a population of over 450,000 people.

The City of Waterloo has provided parks, recreation and related services for well over seventy years. Originally, the construction of the former Waterloo Arena in the Uptown area, the development of multiple baseball fields and the historical development and growth of Waterloo Park represented the primary venues and focus of the City's parks, recreation and leisure services. Over the years, extensive development of parks and recreation resources, including Bechtel Park, Hillside Park, Moses Springer Arena, the Albert McCormick Community Centre and Arena, Waterloo Memorial Recreation Centre, RIM Park and a host of other facilities and park / open space lands has been completed.

In parallel to these initiatives, the City has also extensively engaged in the development of community trails, neighbourhood parks and open space areas which is supported by scheduled annualized capital investments. Also, over the last twenty years, the City, and a number of community-based organizations, have developed museums, festivals, art centres, research institutes and other services within the arts, culture and heritage sectors that have emerged as major assets and resources for the residents of the City of Waterloo.

Also of significance, is that over the last two decades, the City of Waterloo had moved from fairly modest parks and recreation venues, focusing on Waterloo Park and Waterloo Arena, to an extensive array of high quality, multi-use, high participation-oriented facilities that have redefined the City's parks, recreation and leisure service delivery capacities, investments and the participation opportunities for Waterloo residents.

1.2 Recreation and Leisure Services Master Planning Process

In the early 1990s, the City of Waterloo completed its first Parks and Recreation Master Plan. Over the last number of years, the City has undertaken steps to initiate the development of a more comprehensive Recreation and Leisure Services Master Plan to respond to the continuing growth of the City, changes in the operating environment, new initiatives and emerging trends. After examining various Master Plan development methods and pursuing initial development involving principles, goals and related perspectives, the City moved to a comprehensive master planning



process combining the resources of City staff, community organizations and external consultants. In the spring of 2007, a consulting team was selected, and based on the Terms of Reference, a four-phased work program was developed for the City of Waterloo Recreation and Leisure Services Master Plan:

- Phase 1 – Situational Analysis Report;
- Phase 2 – Options and Alternatives Discussion Paper;
- Phase 3 – Draft Recreation and Leisure Services Master Plan and Community Review;
- Phase 4 – Recreation and Leisure Services Master Plan Finalization.

In support of the key outcome areas of the Recreation and Leisure Services Master Plan, a comprehensive Situational Analysis Report was completed and is available under separate cover. It establishes the research, consultation and analytical foundation that was utilized as a basis for the various components of the Recreation and Leisure Services Master Plan.

The key tasks completed in support of the Situational Analysis Report were as follows:

- A population profile, demographic analysis and projections analysis, along with a community development profile and related community development perspectives;
- Current leisure services participation profiles, facility utilization assessments and other usage profiles;
- Review of relevant planning, policy and related strategic and policy materials and documents;
- A 500-unit random selection survey of Waterloo residents generally and by three geographic areas, focusing on participation patterns, future perspectives, evaluation of current services, awareness and value ratings and other inputs;
- Over thirty focus groups, interviews and a public meetings involving some 400 plus community and organized group representatives soliciting their input on the strengths and weaknesses of the recreation and leisure services availability and delivery model in Waterloo, future needs and perspectives and specific initiative inputs;
- A financial review of municipal investments in recreation and leisure services, as well as a department organizational review;

- A facilities and lands inventory, involving recreation facilities, arts and culture facilities, museums, parks, open spaces, and related resources;
- A trends analysis related to recreation and leisure services, delivery models, partnerships and other considerations that will shape future use of and involvement in recreation and leisure services within Waterloo;
- Other key inputs and assessments.

Once the Situational Analysis Report was completed, an Options and Alternatives Discussion Paper was prepared. This Discussion Paper was the framework for sessions with Council, Advisory Committees, the community and staff. The intent of this phase of the master planning process, was to identify areas where strategy alternatives existed and to receive various perspectives on what the alternatives represented and preferred strategies. In all, approximately one hundred people participated in these sessions. The Discussion Paper was prepared based on the results of the Situational Analysis Report and was also used as one of the primary inputs to the development of the Recreation and Leisure Services Master Plan for the City of Waterloo. The Options and Alternatives Discussion Paper is available under separate cover.

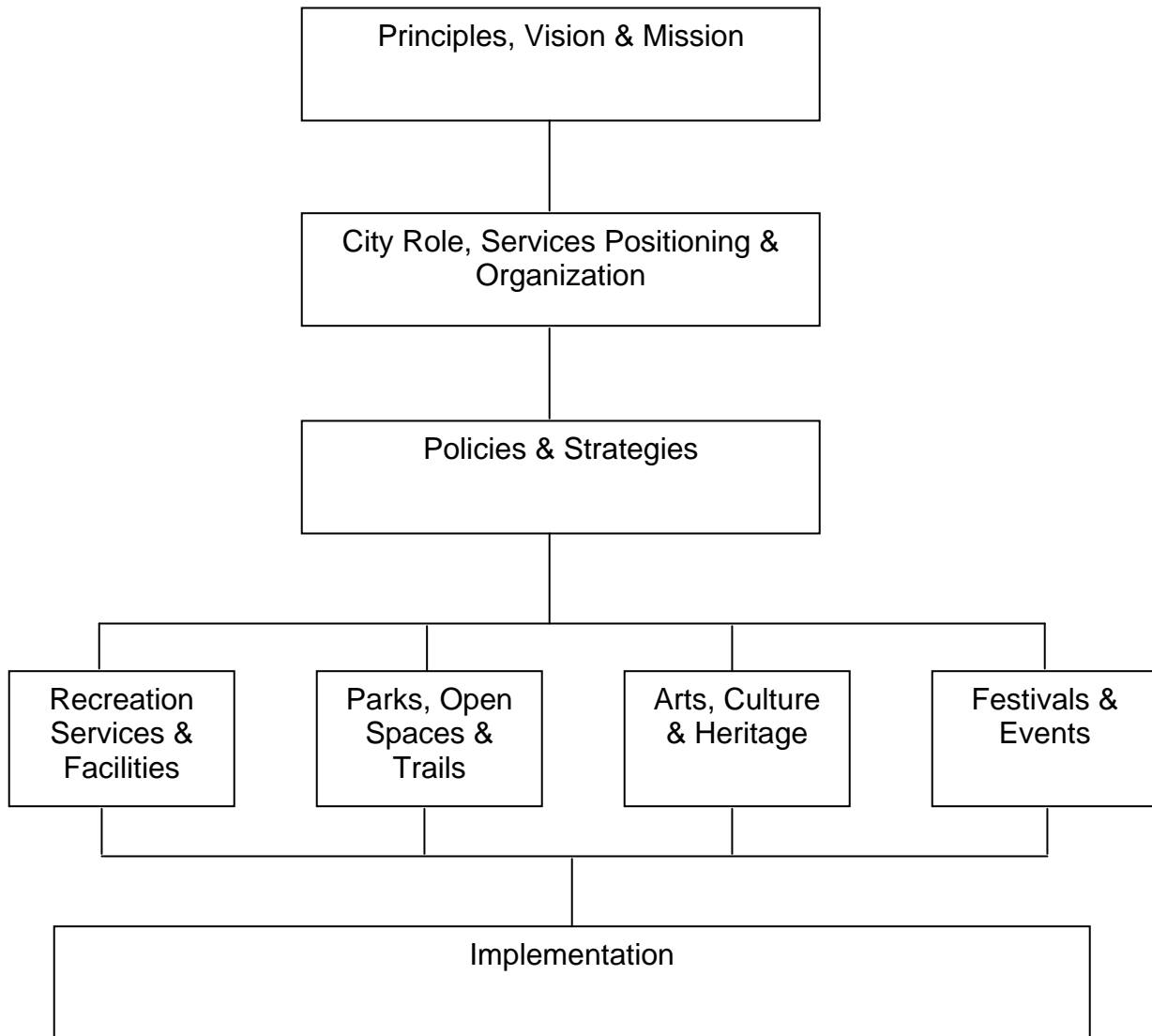
1.3 Recreation and Leisure Services Master Plan Format

The Waterloo Recreation and Leisure Services Master Plan has been developed based on four levels, moving from its strategic foundation through to specific initiatives and then an implementation framework.

- **Level 1 – Plan Foundation** – Section 2.0 provides the philosophical and conceptual basis of the Plan via a Vision, Mission, Principles and Values and Goals.
- **Level 2 – Recreation and Leisure Services Policies and Delivery Strategies** – Sections 3.0 and 4.0, focus on establishing a policy foundation for the City of Waterloo's development, delivery and evaluation of recreation and leisure services, as well as the variable delivery approaches that could be utilized and participated in by the City related to its roles, priorities and structure.

- **Level 3 – Specific Parks, Recreation, Arts and Culture, Heritage and Event Initiatives** – Sections 5.0, 6.0, 7.0 and 8.0 identify specific actions, investments and approaches that are proposed for consideration by the City of Waterloo over the next twenty years related to recreation facilities; parks; arts, culture and heritage; and events.
- **Level 4 – Implementation** – Section 9.0 provides an implementation framework and related elements developed to guide the Master Plan’s ongoing implementation, updating and positioning.

The following graphic depicts the report’s development format.



1.4 Master Plan Goals

The following goals and outcomes have been established for the City of Waterloo Recreation and Leisure Services Master Plan.

- 1. To recommend policy frameworks and servicing strategies that will direct the planning, delivery and evaluation of recreation and leisure services within the City of Waterloo for the next twenty years.**
- 2. To create the framework for community engagement, leadership and accountability in contributing to the planning, delivery and evaluation of recreation and leisure services in the City of Waterloo.**
- 3. To recommend the preliminary roles, responsibilities and contributions of the City of Waterloo and the Department of Recreation and Leisure Services in the planning, delivery and evaluation of recreation and leisure services.**
- 4. To identify specific recreation and leisure services initiatives that respond to resident needs, Department and corporate planning priorities and financial capacity strategies.**
- 5. To provide an implementation plan and strategies that will guide community collaboration and development, decision-making and service delivery strategies over the life of the Master Plan.**

1.5 Recreation and Leisure Services Master Plan Document

This document represents the final draft of the City of Waterloo Recreation and Leisure Services Master Plan. In preparing the final draft, two public workshops were held in June 2008 and a third one in September 2008. Also, senior Department staff held extensive discussions with Advisory Committees, staff and other stakeholders to garner their input. Further, community organizations had the opportunity to submit written submissions. The input received was used by the Consultants to prepare the Recreation and Leisure Services Master Plan.

This document also represents the comprehensive version of the Recreation and Leisure Services Master Plan, involving over seventy recommendations with their rationale and related information. As noted previously, the Master Plan is supported by a Situational Analysis Report which is available under separate cover. Also available is an Executive Summary version that supports broad-based communication and distribution of the Master Plan.

2.0 RECREATION AND LEISURE SERVICES MASTER PLAN FOUNDATION

2.1 Corporate Alignment

The City of Waterloo has developed a Corporate Strategic Plan for the 2007 to 2010 period. It is important that the Recreation and Leisure Services Master Plan be aligned with the overarching City Strategic Plan and directions, as the Master Plan needs to be supportive and contributory to the achievement of the broader Vision, Mission and Principles of the City.

The City's 2007 to 2010 Strategic Plan is built on a Vision, Mission and strategic directions. The following strategic directions are connected to and have assisted in developing the Recreation and Leisure Services Master Plan.

- **Our living environment;**
- **Healthy and safe communities;**
- **Commitment to excellence;**
- **Economic vitality;**
- **Partnerships and collaboration.**

2.2 Recreation and Leisure Services Master Plan

.1 PRINCIPLES

The following Principles have been developed as a basis for the directions, strategies and recommendations within the Master Plan, as well as support measuring the Master Plan's performance and success.

Principles have two applications at this level of planning. First, they provide an opportunity to further outline key components of the Mission. Second, they identify how the Master Plan and the service providers need to interact with residents and participants, and the types of relationships that need to be developed in order to be successful.

Recommendation: Principles

The Waterloo Recreation and Leisure Services Master Plan will contribute to...

Corporate Strategic Alignment

Developing recreation and leisure services that align with and support City priorities and initiatives related to resident health, economic strategies, the environment, community development and quality of life.

A Balanced Array of Recreation and Leisure Opportunities

The provision of a balanced array of recreation and leisure opportunities, involving recreation, parks, sports, arts, culture and heritage linked through partnerships to social, health, education and related public and community services.

Fairness and Inclusion

Fair and inclusive recreation and leisure opportunities that encourage and facilitate participation by all residents of the City in terms of ability, age, culture, economic, geographic and related interests and backgrounds.

Services Integrity and Evaluation

Developing, delivering and evaluating recreation and leisure services that operate with integrity, are continually evaluated relative to outcomes and respond to evolving resident needs and community growth.

Balancing Public Accessibility and Revenue Generation

Recreation and leisure services delivery that achieves a fair and reasonable balance between facilitating broad-based public accessibility and generating revenues at a level that does not result in an undue burden on City taxpayers.

Maximizing Facility Utilization

Achievement of maximum utilization of existing facilities is a priority before new facility development, along with ensuring cost effective facilities operations and undertaking the ongoing rehabilitation and renewal of facilities to meet evolving market needs.

Defined Department Leadership Role

The Recreation and Leisure Services Department undertaking leadership roles in the planning, development, facilitation, evaluation and supports for recreation and leisure services, using an array of innovative delivery strategies involving partnerships, joint ventures, direct delivery and community-based service provider approaches.

Conservation of Natural Resources

Ensuring that the City's parks, open spaces and trails continue being valued by the community, conserve key environmental resources, are accessible to the public for both programmed and non-programmed activities where feasible and contribute significantly to a positive urban form within Waterloo.

Flexible and Sustainable Facilities

Recreation and leisure services that are flexible, sustainable and environmentally responsible over the longer term through innovative designs, are adaptable and flexible, facilitate an ease of maintenance and support the inclusion of all residents.

Recreation and leisure services do not stand alone as to their rationale and scope. They are important investment instruments in terms of broader community strategies. The Master Plan needs to ensure that the services being proposed are supportive to various senior government and City initiatives, eg: Smart Growth, the City's evolving economic development strategy, the Official Plan Review, transportation priorities and investments, and other strategic initiatives.

The second Principle identifies the importance of achieving and offering a balanced mix of recreation and leisure services that includes recreation, arts, culture, heritage and other servicing dimensions. It is through this balanced approach that a spectrum of services is available that can meet the multitude of needs and variable interests of residents. Recreation and leisure services are not for one particular dimension of the community. They need to be reasonably available for the multitude of resident interests and be accessible, affordable and facilitate community leadership and volunteerism.

Also important, is that recreation and leisure services do not stand alone. They have significant interconnectivity with social, health, educational and other related services. This trend focuses on the holistic development of each person, and treating them as a whole person and not by individual service sectors. It is through this interactive and collaborative approach that residents are better

served, have more opportunities and achieve enhanced outcomes and benefits from their participation in recreation and leisure services.

Another Principle supports the need for the fair and inclusive provision of recreation and leisure services so that all residents can have a reasonable opportunity to participate. These services also need to encourage participation. This encouragement needs to be both generic in terms of the whole population but also needs to be targeted at specific groups who have barriers that need to be overcome, require different types of informational resources or have other considerations that need to be addressed in order to ensure fair and equitable access. In an increasingly multicultural community, these communication and encouragement processes become increasingly important and diverse in order to serve the whole community.

A Principle has been identified that focuses on the effective and managed balance between broad-based public accessibility to major parks, recreation and leisure facilities, with the need to generate required revenues. It is recognized, that this is a challenging perspective, but it must always be at the forefront in the decision-making on the scheduling of major parks and facilities, the development and implementation of cost and fee structures and how priorities are established related to the allocation of facility spaces. Consideration within City allocation policies need to connect with all the Principles, such as accessibility, fairness, targeted populations and related values, in concert with the need for community and participant responsibility to share in and accept their portion of the costs associated with supporting their own participation.

The Master Plan includes a Principle focusing on the renewal of existing facilities to ensure that maximum use is being made of what is already available. Too often, the planning focus gravitates towards the new and exciting and loses sight of what currently exists. Many municipalities, Waterloo included, have aging facilities that have been in existence for twenty to fifty years or more. Therefore, not losing sight of the need for rehabilitation and renewal is important. Also, Waterloo is constrained by land availability for new facilities, further emphasizing the renewal of existing resources as an important development strategy.

One of the key Principles of the Master Plan is that the Recreation and Leisure Services Department has a definable and an important leadership role in the planning, development, facilitation, delivery and evaluation of recreation and leisure services in Waterloo. The department represents a significant resource in terms of the assets they have to work with, their technical skills and capabilities and other inputs that are vital to both the services they deliver directly and the supports they can provide to other parties who are central to the overall recreation and leisure services delivery strategy. The City does not need to be all things to all people or undertake every thing directly. In fact, the ability to work with community associations, organized leisure services groups and other parties is a priority strategy in expanding the array of services, their geographic

distribution, the opportunities for people to contribute to their community through volunteerism and to ensure greater levels of resident involvement in and benefit from active participation.

The City's parks, open space and natural areas represent significant community assets. They impact the urban form and development pattern of the City, as well as conserve key natural resources that are valued by the residents and are necessary to sustain a healthy ecological and environmental balance. Also, these resources can support both program and non-programmed participation activities. Not all recreation and leisure services need to be programmed. In fact, there is significant importance in ensuring that there are opportunities for spontaneous and unorganized activities which fosters enhanced creativity, social interchange and adaptability. Key areas of consideration within this Principle involve the community trail system which is highly valued, the McNally Lands which are a significant resource, along with the Grand River corridor and the City's formal parks and sportsfields, including highly valued and universally known Waterloo Park.

Investments in recreation and leisure services also need to be sustainable over the long term. This can come in the form of innovative facility designs and energy efficient operations or it may involve facilities and services that are adaptable and flexible to support changing uses. There are a host of considerations in facility and venue designs that are connected to this Principle in terms of ensuring the City's investments maximize the outcomes to be realized, the long term sustainability of the services and the user benefits and satisfaction to be achieved.

.2 VISION STATEMENT

A Vision Statement sets a horizon towards which all stakeholders can gravitate. It should be both inspirational and a statement that creates a common bond and sense of direction. The Vision Statement establishes a direction for the Master Plan and is a basis upon which the Plan evolves, both in terms of its development and its ongoing implementation.

Recommendation – Vision Statement

Waterloo residents will have access to a diverse and balanced array of recreation and leisure opportunities that respond to evolving resident interests, improve resident health and well-being, and facilitate individual and community participation, development and leadership.

The key component of the Vision is that there will be a diverse and balanced array of recreation and leisure opportunities to meet the varied interests of Waterloo residents and that these opportunities will be accessible and evolve over time.

The second part of the Vision identifies the three key focuses that collectively identify the rationale for these investments and why residents benefit from participation in recreation and leisure activities.

The first benefit recognizes that there is a diverse array of interests and needs amongst the residents of Waterloo and that they will change over time. The Vision clearly articulates a service delivery environment that has a balanced array of opportunities that respond to resident interests and needs. This balanced array needs to be responsive to cultural diversity, evolving age and ability perspectives, changing interests and technologies and a host of other considerations that continually influence the development and delivery of the services. The service delivery environment needs to be dynamic, responsive and accessible in order for the Vision to be realized.

The second benefit speaks to the health and well-being of the residents through their participation. Active participation involves fitness; the development of the mind; the achievement of new skills and enhanced personal development; the pursuit of ones interests; and the ongoing development of the whole person, as both an individual and as contributing member of the community.

Personal and community development, or capacity building, is the third benefit, involving the opportunity for residents to invest in their community through direct participation, volunteerism, leadership and other activities, whether as a coach for sporting activities, an instructor in an arts class or contributing to a community association's efforts to better their community or area of Waterloo.

.3 MISSION STATEMENT

A Mission Statement speaks to the fundamentals and the focus of what is going to be achieved via the Master Plan. It articulates intent and the broad strategic approaches to be utilized within the Master Plan to achieve the Vision and contribute to the achievement of the City's and the Department's strategic directions and priorities.

Recommendation – Mission Statement

The City of Waterloo Recreation and Leisure Services Master Plan directs the achievement of a balanced array of accessible, participation and audience-based recreation and leisure opportunities that support the interests of its growing population. The Master Plan builds on the breadth of the community's recreation and leisure resources that collectively contribute to the enrichment of the quality of life for Waterloo residents through both collaborative and direct service delivery strategies that:

- **Inspire a true value for the benefits of recreation and leisure participation, and encourage broad-based, active lifestyles that contribute to improved resident health, well-being and personal development.**
- **Generate a strengthened sense of community identity, spirit and service amongst all residents.**
- **Support improved community unity and capacity development, along with enhanced City attractivity and economic development.**

The primary outcome for the Master Plan is to provide directions and strategies that support continually enriching the quality of life of Waterloo residents by being able to access recreation, sports, arts and culture, park and heritage services that respond to both their current and evolving interests and needs.

The first objective of the Mission Statement is to position the Master Plan and its strategies to focus on residents understanding the benefits of recreation and leisure participation as an important part of life within the community for both them and their families.

This objective focuses on recreation and leisure benefits enhancing resident health, well-being and personal development. This could involve fitness in terms of physical activity. It could include well-being in terms of reducing stress or being able to socialize and be with others as a means to overcome isolation. It also could involve personal development in terms of expressing artistic interests or being involved as a volunteer and contributing back to the community to satisfy their need to be a member of their community and to serve.

The second objective speaks to the community as a collective of its residents. Recreation and leisure services, through team sports, individual activities, external travel, etc. have the opportunity to strengthen the residents' sense of community through creating a stronger identity and affinity for

the City, that is Waterloo being a positive and good place to live. Another perspective, is that recreation and leisure services can create unique opportunities for people to serve their community through volunteer roles and other supports that contribute to enhancing the quality of life of individuals in the community and the overall well-being of the community itself, through taking direct individual responsibility for improving and enriching community life.

The third objective focuses on the growth and vibrancy of the City's communities via building the leadership, interest and connecting points necessary for all areas of Waterloo to be engaged and sustainable. The Master Plan also needs to be able to provide contributions to the City's community and economic development roles and initiatives. These can be achieved through parks providing significant urban form resources and the ongoing physical development of the community trail system that connects various nodes within the City to provide alternate transportation systems. Economically, sport and family tourism and other economic activities within the recreation and leisure services mandate can be valuable to the community in terms of job creation, economic sustainability and enhancing the revenue generation capacities of key recreation and leisure facilities, thus reducing their financial impacts on residents and users.

2.3 Recreation and Leisure Services Delivery Policy Framework

Overview

Municipalities face increasing expectations to deliver a widening range of recreation and leisure opportunities, many of them involving increasingly sophisticated facilities, integrated services delivery approaches and growing long term capital, operating, financial and sustainability requirements. Society has moved to a point where there is a growing array of recreation and leisure activities that people want to be involved with. Many of them involve smaller clusters / segments of individuals within the community and beyond. Also, many activities subdivide into groups that want high performance experiences or individuals who just wish to try something out or have a more limited experience. In the middle, are hobbyist or regular participants who operate at a recreation level of interest, eg: joggers, lane swimmers, etc.

Further challenging this environment, are new groups that are forming and need support while established community groups often go through cycles of strength and weakness variability that can threaten service quality and availability from time to time.

As a basis for the City to express its role in the planning, development, delivery and evaluation of recreation and leisure services, it requires a policy framework upon which to ensure that it is not seen as the sole party responsible and that everything related to this service sector does not lead back to the City. However, the policy also needs to recognize that the City is in a unique position

within the recreation and leisure services delivery model in terms of skills and capacities, assets and financial resources, service stability and other key delivery factors and outcomes. Finding a balance that is a basis to undertake this role is part of the long term planning process for recreation and leisure services in Waterloo.

Recommendation: Recreation and Leisure Services Delivery Policy Framework

- **DEFINITION:** That recreation and leisure services include recreation, sports, arts, culture, heritage and park activities and resources, involving both participant and audience-based activities and services.
- **SERVICE DELIVERY APPROACH:** That community-based organizations represent the principal service delivery approach in Waterloo, and represent the primary means for expanding the accessibility, availability, affordability and mix of recreation and leisure services available to Waterloo residents.
- **PRIORITIZATION PROCESS:** That the prioritization process for City of Waterloo participation in recreation and leisure services focus on City residents first as the primary users within the following servicing priority framework:
 - **First - Supporting Corporate Strategic Plan:** services that are primarily intended to support key strategic directions of the City outlined in the Corporate Strategic Plan and other strategic initiatives.
 - **Second - Broad Based Participation:** services that facilitate and encourage broad-based participation amongst City residents at recreational participation levels, including in-City, regional and provincial competitively oriented activities for children and youth.
 - **Third - Inclusion:** services and accessibility supports that link to requirements for identifiable groups, including those with disabilities, seniors, young children, teens, new immigrants and others.
 - **Fourth - Competitive Participation and Events:** services that support competitive, high performance participation, tournaments, events, festivals, shows and related activities.

- **CITY ROLE:** The City will fulfill its role in the planning, development, delivery and evaluation of recreation and leisure services based on the following hierarchy of City responses and roles, and within its budgetary priorities and strategies as established by Council:
 - **First - Facilitation:** will actively work to facilitate and support community groups and individuals in the development and delivery of recreation and leisure services by providing:
 - **Technical supports;**
 - **Access to grants / financial resources, data and information;**
 - **Volunteer training and recognition;**
 - **Access to facilities;**
 - **Trends research, and;**
 - **Related strategies and supports.**
 - **Second - Partnerships:** will enter into partnerships, joint ventures and related collaborative initiatives, at variable levels of involvement, that result in a shared responsibility for recreation and leisure services delivery where:
 - **The interest of the residents of Waterloo are fully realized;**
 - **Need / demand for the service is demonstrated;**
 - **Sustainability exists within acceptable risk parameters.**

- **Third - Direct Delivery:** undertake the direct delivery of recreation and leisure services where need is established and other service delivery strategies are not viable or available, utilizing direct capital investment and annual budget support, as well as City staff operating alone or in partnership with volunteers.
- **CITY LEADERSHIP:** That the City will have a leadership role in the integration and planning of recreation and leisure services delivery in Waterloo, including:
 - Needs and trends identification;
 - Services evaluation;
 - Support for the organization of community-based initiatives.
- **CITY INVOLVEMENT CRITERIA:** That any City involvement in recreation and leisure services delivery should be based on the following criteria:
 - Identification of demonstrated need at reasonable participation levels;
 - Evidence of long term sustainability for the service;
 - Assured public accessibility, participation and affordability;
 - Involvement by the City at a scale reflective of the benefits to be achieved to both the participants and the community at large;
 - The use of business case analysis as a basis to support City investments in recreation and leisure services initiatives;
 - Consistent with City revenue generation strategies;
 - A transferability assessment of directly delivered City programs as to how they might be delivered in the future by an alternate service provider.
- **CITY EVALUATION:** The City will establish an evaluation process with a data collection and outcomes / performance monitoring capacity that will effectively assess:
 - The value of the City's role in the various service delivery strategies;

- **The degree of participation that is being realized;**
- **The benefits being achieved via City investment.**

This policy framework focuses on the fact that the City is better served if organized community and other groups and individuals can be fully integrated into and are able to drive the delivery of recreation and leisure services. This strategy generally focuses on programs delivery, as many facilities are too costly to operate and often require some form of direct or partial City involvement. The City can not be all things to all people. Therefore, groups of individuals with a particular interest need to galvanize themselves to a point where they can take on many of the leadership, administrative, program development and delivery roles and accountabilities.

The City has a significant role in supporting community groups to assist them to organize, to provide technical supports and to aid them in terms of overcoming some of the challenges that may occur from time to time. This role allows the City to engage with these groups at points where the groups can remain independent but do not have the capacity to access key resources which could range from marketing and advertising, to registration, to volunteer training and development, to program evaluation, to accessing grants, to assessing new opportunities, etc. The City has some of these skills and capacities in-house or may have access to such resources that can be beneficial to these groups, especially if they are experiencing difficulties and their sustainability becomes threatened.

The second level of the policy indicates that the City, before it undertakes direct involvement in the delivery of a recreation and leisure service, will assess alternative approaches. This approach could involve partnerships, joint ventures or other collaborative formats. This is not a new perspective for the City, but asking the question early in a services review and development process, as to whether other delivery strategies are available, needs to be formalized. It may be that these opportunities are not apparent to proponent groups, and that partnerships and joint ventures may need to be initiated by the City or even organized by the City in terms of forming groups or operations that could eventually be a partner.

The third dimension of the hierarchy, is that the City, based on evident need and policy compliance, decides to undertake a direct investment in the development and delivery of a recreation or leisure service. This will occur when no other available delivery alternatives exist but need for the services is apparent. Also, this policy position is not intended to become a catch all or “saviour” approach for existing services. All direct City services require evident need, be an identifiable priority and are supportable within available resources, consistent with City Council budgetary priorities and strategies.

A further role for the City is system planning and evaluation. No other parties have the scope, mandate or capacity to identify and assess trends, undertake sector coordination or fulfill other key services integration roles. The City is uniquely positioned to fulfill this strategic role.

This policy further articulates key criteria and related considerations to be addressed whenever the City becomes involved in recreation and leisure services initiatives. The affordability and accessibility of the public becomes a major criteria, as does sustainability and other considerations. Another important consideration is that the scale of the City's involvement needs to be in balance with the benefits that are to be realized. It is possible that some ideas that come forward are out of scale with the benefits that will be realized. This needs to be assessed, all within a business case model.

From a policy implementation perspective, the City will need to further develop the implementation dimensions of the policy, giving particular consideration to the last point which is ensuring the data recording systems are in place to assess both participation and benefits, as well as performance monitoring of the outcomes desired and how they are being achieved.

3.0 CITY SERVICES DELIVERY ORGANIZATION

3.1 Introduction

The research activities and community consultation programs associated with the development of the Recreation and Leisure Services Master Plan for the City of Waterloo generated more than average amount of commentary, input and perspectives in regards to how recreation and leisure services are organized, the role of the City, the current levels of community development support available and a wide perspective, that there needs to be an increasing responsibility of residents and community organizations to undertake stronger and broader leadership and service delivery roles. The fundamental premises to many of these comments were two fold:

- The City cannot be all things to all people in regards to recreation and leisure services;
- The costs of service development and delivery are increasing and cannot be sustained within the constraints being experienced by the City. This is apparent particularly related to capital investment considerations, but also relative to City operating costs.

Based on the Situational Analysis Report results, and the commentary received via the Options and Alternatives discussions, of which the City's role and responsibilities was a primary component, re-engineering and positioning of the City's role and activities needs to be assessed, developed, implemented and evaluated.

3.2 Recreation and Leisure Services Role

Overview

Currently, the Recreation and Leisure Services Department has principal responsibility for the development and delivery of recreation and leisure services engaged in by the City of Waterloo, in collaboration with Development Services, Public Works Services, Environment and Parks Services, which all have various roles in the development, maintenance and set up responsibilities for parks, sportsfields, trails and open space venues. The Asset Management Division of the Corporate Services Department is responsible for recreation and leisure facilities asset management tasks, both on a long-term plan basis as well as day-to-day facility maintenance. Other departments also have aligned responsibilities in terms of finance, legal, information systems and technology, development approvals, planning and other divisions in the overall corporate structure.

The main perspectives that emerged from the various consultations and assessments, involved three key considerations:

- The community taking increased responsibility for program and services development and leadership;
- The City engaging more in community development and capacity building and potentially reducing the scope of its direct services delivery activities;
- The underdevelopment and undervaluing of arts, culture and heritage services in Waterloo.

The proposed Recreation and Leisure Services Policy for the City of Waterloo increases the focus and attention on facilitation and partnerships / joint ventures as the primary means of recreation and leisure services delivery. The intent is to lessen the City's scope of direct delivery (that is where City staff / contractors provide the program or service directly to the public), where feasible, and to engage community members more intensively in services development and delivery. However, the policy recognizes, that the City has a significant role, whether partnering in direct initiatives, or providing community and capacity development supports that are necessary to sustain and stabilize community service providers over time. This is a model that has been used in a number of other municipalities. Considerable reference was made to the City of Kitchener's use of its community development model, that often has points of contact with Kitchener-Waterloo or Twin City groups where both municipalities are directly engaged.

Community development and capacity building is generally defined to have the following key potential roles:

- Working with community organizations on a direct basis to support them in their governance, program operations, longer term planning, grants acquisition and related tasks;
- Providing training and development on governance, volunteer recruitment and development, marketing, program evaluation and other functions;
- Undertaking organizational reviews;
- Facilitating access to information, facilities, funding and other available resources within the City, the community or beyond;
- Working with community groups to undertake orientation and training activities in order to build leadership and skills-based capacities within the organization;

- Supporting organizations in understanding how to present proposals, to advocate, etc.;
- Undertaking leadership roles in focused areas to form sport, ice, arts and culture and other councils and coordinating groups in order to enhance services, training and marketing; to reduce duplication; and to more effectively network and share information;
- Facilitating the development of new community organizations and leadership initiatives that lead to the further development and delivery of both existing or new recreation and leisure services;
- Respond to organizational issues and challenges that could undermine the availability of a balanced array of recreation and leisure services in Waterloo;
- Other tasks that are helpful to the ongoing sustainability, growth and capacity of community service delivery organizations to grow and remain relevant and capable.

In light of the proposed direction which would see programs delivery transition to an emphasis on community development and capacity building, the City of Waterloo will also have to examine whether there are areas within its direct delivery of services approach that could be delivered via community organizations or other service sectors in order to align with the proposed policy directions and City priorities. Any potential cost savings realized should be reinvested into the full scope of community development and capacity building resources. This transition would primarily impact leisure programming activities. Asset management and parks operations would be sustained as City functions due to investment, technical, liability and related perspectives.

Recommendation: Recreation and Leisure Department Services Roles and Priorities

- **That the Recreation and Leisure Services Department undertake a functional reorganizational initiative that:**
 - **Prioritizes its staffing and services in alignment with the directions and strategies of the Master Plan;**
 - **Continues to intensify its efforts at formulating, managing and evaluating partnerships, joint ventures and other collaborative approaches to services delivery within the City, and on a broader geographic market basis as appropriate;**

- **Are undertaken, where feasible and appropriate, in collaboration with the City of Kitchener so as to maximize staff efficiencies in dual contact situations;**
- **An organizational model be developed based on consultation, best practices and other inputs that supports the multi-dimensional service approach necessary to effectively develop and implement a community development and capacity building priority.**
- **That the City undertake a review of its directly delivered programs and services and candidly assess the opportunities and risks associated with transitioning such services to community and institutional service providers, the private sector or via the formulating of new service delivery organizations, with the review and implementation strategy to be undertaken over the next five years involving community members and service provider organizations representatives.**
- **That the potential reorganization of the Recreation and Leisure Services Department ensure that a role and function is identified that focuses on strategic initiatives and system planning, policy development and reviews, services integration and service delivery evaluation and performance measurement for all Department services and the community.**
- **That the City of Waterloo finalize its review of Asset Management's roles in recreation and leisure facilities, focusing potentially more on systems maintenance and long-term rehabilitation, with day-to-day maintenance assigned to facility operations.**
- **That any cost savings generated from these strategies be reinvested to support the organization and other changes and initiatives recommended in this Master Plan.**

The Recreation and Leisure Services Department, in order to effectively respond to the strategic directions within this Recreation and Leisure Services Master Plan, will need to realign its staffing, financial and other resources, with a particular emphasis on community development and capacity building.

Other considerations, also involve the need to give consideration to potentially transitioning Department direct service delivery activities to community service providers, institutional organizations or to support the development of new organizations that can potentially undertake these services effectively. The City needs to establish a five-year assessment and implementation program to effectively transition any services that are to be delivered within a different model in order to ensure continuity, consistency, quality and that major issues do not emerge. These transitions will require an opportunities and risk analysis so that informed decisions can be undertaken. They also will require significant consultation and negotiations with community organizations.

Some of the key areas of potential transition involve considering positioning the Older Adult Centre within a new not-for-profit corporate structure that self-operates with City support; potential use of other providers for senior support services where improved efficiencies, communication and service integration may be derived due to a larger scope of operations; a range of leisure programs that are offered in multiple venues which could be undertaken by neighbourhood associations or other groups; and the Community Adult Recreation Leagues program which, particularly if it were to move to a regional venue model, may be more effectively able to operate under a non-profit corporate structure, as long as guarantees exist relative to its utilization and revenue generation within Waterloo recreation and leisure facilities is preserved.

Another consideration that emerged through the consultation and assessment phases of the Master Plan, was the potential to realign the Asset Management Division's relationship with recreation and leisure facilities. An internal review is underway and needs to be finalized. There are potential economies of scale and staff integration opportunities that could exist if current recreation facility staff were to possibly undertake more of the day-to day maintenance, focusing Asset Management staff on major systems maintenance, structural considerations and project management associated with facility renewal and rehabilitation. Currently, there are Asset Management and Recreation and Leisure Services Facilities forepersons on the same sites supervising different crews. One would have to assess whether there would be some integration opportunities when it comes to such items as patching drywall, painting, door hardware repairs and related maintenance tasks.

A further consideration, could be reorganizing how janitorial and operational services are undertaken in these facilities, as in the larger facilities they have separate supervision and crews. There may be opportunities for enhanced integration of roles and functions that may provide operational efficiencies.

3.3 Culture & Events Organizational Capacities

.1 ARTS, CULTURE AND HERITAGE

OVERVIEW

Staff resources for arts, heritage and culture programs are managed by three full-time staff, which constitute 2.5% of staffing for the Recreation and Leisure Services Department. The Manager of Cultural Development and the Heritage Resources Program Manager both report to the Director of Community Services. The Festivals Coordinator reports to the Manager of Cultural Development.

In addition, the Manager of Cultural Development and Manager of Heritage Services liaise with and provides staff support to the Advisory Committee of Culture. The Municipal Heritage Committee liaises with the Department of Development Services, and the Heritage Resources Program Manager attends meetings as required and works with the Committee on an informed basis.

Despite efforts to develop guiding principles, issues around lack of resources, communication, and policy have resulted in a sense of frustration on the part of staff and volunteers, a lack of integration and strategic direction, and a hidden profile for cultural programs in this department.

In addition to a dedicated and creative community base, the elevation of Waterloo's cultural agenda requires support and participation within the municipal government structure. A scan of best practices in Ontario indicates that the mechanisms such as a voice for culture at the senior management level, internal coordination of information and resources, integration into key strategic planning, accountability at the council level, and program coordination and cooperation between service areas are key to developing successful strategies for an elevated cultural agenda.

A comprehensive foundation for integrated cultural planning has been laid with the development of significant plans and policies that recognize the value of the city's cultural resources. These include imagine! Waterloo2001 Vision Statement, the Strategic Plan 2005-2007, the Official Plan Review, and the City's urban design guidelines.

At the present time, given the parameters of this discussion as one component of a larger plan focusing on recreation and leisure services delivery, and given the realization that a separate department for culture is beyond the scope of this project, it is recommended that the Department reorganization recommendations give strong leadership, staffing and role positioning for cultural services as the organizational realignment emerges. The Recreation and Leisure Services Department should place a stronger focus and provide additional resources for cultural development. A greater balance in cultural services in relation to sports and recreation was one of the recommendations that emerged from the consultations.

Recommendation: Cultural Services Division

- **That the City consider establishing a strong cultural services focus and capacity in the Department reorganization proposed in the Master Plan.**
- **That consideration be given to additional arts, cultural and heritage resourcing based on directions established in the proposed Waterloo Cultural Plan.**

.2 FESTIVAL AND EVENT STAFFING CAPACITY

OVERVIEW

Municipal staff resources focused on the acquisition and staging of festivals and events by third parties are attached to the larger recreational venues (RIM Park and Waterloo Memorial Recreation Complex) or have culture and heritage leadership roles. Additionally, the City currently has full time staff centralized within the Department, focused on the direct delivery of selected events. During the staff interviews at the different venues and within the Department as part of the Situational Analysis Report, it was apparent that festival and event activities were not operating under a broad overall strategy, but were responding to the specific needs of the venues or focused on the delivery of specific large events. In general, staff attached to a specific venue were not aware of the event activities at other venues or the event resources and activities involved in the direct delivery of selected events.

Recommendation: Organization of Staff Resources

- **That current Department staff engaged in event delivery should support the transitional strategy for those events now delivered by the City. Specifically, municipal staff should serve as advisors to the new event organizing committees over a three year transitional period with roles consistent with the proposed Department organizational structural review.**

3.4 Neighbourhood Level Servicing

OVERVIEW

One of the outcomes of the Situational Analysis Report and the Options and Alternatives Discussions, was recognition that the City has an extensive array of City-wide recreation and leisure services and major district facilities. However, there appears to be a potential gap in some areas of the City related to neighbourhood servicing levels. Most of the City is covered by neighbourhood associations who work with residents in defined geographic areas. A number of these neighbourhood associations are engaged in planning, environmental and other local issues, as well as recreation and leisure services at a neighbourhood scale. Many individuals participating in the consultation program identified the opportunities available in Kitchener with its focus on neighbourhood centres that are uniquely different as to programs and operations on a neighbourhood by neighbourhood basis.

Due to geography, current facility development scales and other opportunities, it is not necessary to develop a series of City-owned neighbourhood centres in Waterloo. However, what may be beneficial and consistent with the Recreation and Leisure Services Policy directions in this Master Plan, is to provide community development and capacity building services to neighbourhood association and to work with them to access spaces in local schools, churches, ethnocultural halls, clubhouses and related venues, as a basis to deliver services that respond directly to the demographic, accessibility, event and related needs and interests of their neighbourhood. Such a model would allow for unique recreation and leisure programming to evolve at a neighbourhood level, creating a model that could bring more services to where people live rather than developing increasing expectations of participants needing to travel out of their communities to access service. This is also a more environmentally friendly approach if successful, in that it could reduce drive times and enhance opportunities for pedestrian or cycling access to services.

This is a longer term initiative that will need to be undertaken in stages, building on existing capacities, followed by developing new capacities and being able to provide ongoing supports to the expected ebbs and flows that will occur within this grassroots, volunteer-oriented model.

Recommendation: Neighbourhood Services Strategy

- **That the Recreation and Leisure Services Department undertake a neighbourhood services development strategy, engaging existing and new neighbourhood associations, supported through community development and capacity building services of the Department, to develop and deliver local neighbourhood recreation and leisure programs;**
- **That Department staff resources be assigned to supporting neighbourhood associations within the community development and capacity building model;**
- **That program venues be primarily focused on existing spaces within the neighbourhood involving schools, churches, clubhouses, multicultural halls, appropriate City facilities and other resources to facilitate enhanced accessibility;**
- **That the primary supports to be provided to the neighbourhood associations would involve organizational development and financial sustainability, training and development, facility access, marketing and promotion and program demand and evaluation assessments undertaken within a collaborative model involving neighbourhood association leadership.**

3.5 Community and Volunteer Capacity Development

Overview

Volunteers and voluntary organizations represent a key cornerstone in the development and delivery of recreation and leisure services in Waterloo. They are engaged in virtually all levels of service delivery whether through voluntary organizations in minor sports, the arts and culture or special events and festivals. Volunteers are also actively engaged not only in these areas, but also in some City delivered programs.

The future services delivery direction within the Master Plan, identifies an opportunity for the City to engage with community volunteers and voluntary organizations to enhance their presence, capacities and role in the development and delivery of recreation and leisure services. This is a significant policy direction that reflects the importance of engaging the community in not just identifying recreation and leisure services needs, but being actively involved in and responsible for

leading and providing these services. The Master Plan also identifies an important initiative to enhance and expand recreation and leisure services delivery at the neighbourhood level, working collaboratively with neighbourhood associations who in many cases would assume leadership responsibilities.

Based on the research and the community consultation, community volunteers and voluntary organizations not only are active, but see an expanded role and set of responsibilities, ranging from leadership positions to increased engagement across the spectrum of services. However, it was also widely recognized, that not all neighbourhoods have an organized association or the capacity to develop and deliver recreation and leisure programs. It is also known, that voluntary organizations evolve through peaks and valleys of capacity and leadership; have significant challenges in regards to financial resources; and need other supports in order to enhance their effectiveness in fulfilling their leadership and service delivery roles. Therefore, the Master Plan needs to ensure that there are provisions identified to support the transition to the enhanced volunteer service delivery model in order to effectively sustain that model as a principal method in providing recreation and leisure services to the citizens of Waterloo.

The City will need to provide funding and staffing support in order to assist new groups to organize and current groups to be able to realize their capacities and meet the needs of the people they serve. Also, the City has a role in sustaining community voluntary organization stability through the provision of common supports that will enhance the efficiency and the effectiveness of community groups, such as marketing, training, trends research, facilitating networking amongst the service providers and other opportunities.

In everything the City undertakes in regards to community volunteers and voluntary organizations, it must work from a principal of collaboration, support, respect, effective listening and other characteristics that are necessary in order to forge partnerships and achieve outcomes that allow the voluntary service delivery model to grow, to be sustainable and to actively engage the community.

A number of recommendations within this Master Plan contribute to the building of capacity amongst the voluntary sector. These include the Leisure Services Delivery Policy, the recommendations in regards to Department repositioning and organizational development, the funding support program, collaborative and shared services and other policies and strategies.

Recommendation: Voluntary Sector Services Delivery

- **That the repositioning and reorganization of the Recreation and Leisure Services Department give full recognition to and ensure that organizational capacities are in place to support a growing leadership and services delivery role for community volunteers and voluntary organizations;**
- **That the City engage with the various voluntary organizations at a level consistent with the capacities, experiences and approaches of each voluntary service delivery organization, respecting the fact that each organization is unique and may be at different levels of development and capability;**
- **That City supports to the voluntary service delivery sector also include the provision of common supports, such as marketing, training, research and related perspectives that will bring benefits to these groups that they likely could not achieve within their own resources;**
- **That the City annually undertake a multi-tiered recognition program for volunteers and voluntary organizations with respect to longevity of service, special initiatives and benefits they achieve so that the community is aware of the important contributions volunteers make to the quality of life in Waterloo;**
- **That the City, working with the voluntary service delivery sector, potentially host one or two forums per year for volunteers and voluntary organization members in regards to presenting trends and related research, sharing information on senior government grants, discussing City policy and funding directions and seeking input and perspectives on service delivery needs, opportunities and policy and funding requirements;**
- **That the Department of Recreation and Leisure Services give consideration to the future volunteer strategies being considered by the City.**

3.6 Customer Service and Services Planning

OVERVIEW

The City of Waterloo has established important capacities in enhancing customer service and for facilitating access. In an era of electronic transactions, a need exists to continue to explore and

implement increasingly user friendly registration, payment, information gathering and market research processes that enhance both customer service and services planning and evaluation.

The City has implemented the CLASS System which is a widely used registration technology. However, constraints exist in the system in moving towards full online registration, payment and information gathering. The City, with the university capacities available and education levels that Waterloo residents have, needs to consider being a leader in online services.

In addition, service planning would be enhanced by increased market research activities and customer program evaluations, both of which could be undertaken through online surveys and electronically driven analytical programs.

Another consideration in this area, is the need to streamline special event processes. Currently, for indoor activities, an event operator may need to contact two to three individuals within the Recreation and Leisure Services Department and / or the food services contractor. If the event involves an outdoor facility, such as sportsfields, up to four individuals may need to be contacted as the Parks Division becomes involved. An initiative needs to be undertaken that brings together single points of customer contact for all events and related initiatives. As well, there needs to be continuing efforts to enhance integration between Parks, Recreation and Leisure and Development Services related to the planning for long-term parks development and related policy, planning and operational considerations. This initiative needs to be considered in regards to the proposed Department reorganization initiative.

Recommendation: Customer Service and Services Planning

- **That the City undertake an initiative to move towards a single point of service access for both indoor and outdoor tournaments, events, festivals and related activities;**
- **That the City incorporate recreation and leisure services needs into the planned corporate technology plan to support the full development of online registration, payment, program evaluation and related services;**

- **That the City continually upgrade and develop new electronic information points of access that support the marketing and promotion of both City and community service providers' programs, including opportunities for market research and program evaluation analysis, and support web portals for:**
 - **Arts and culture;**
 - **Heritage;**
 - **Recreation and leisure;**
 - **Festivals and events.**

- **That the City host an annual community services provider forum that focuses on:**
 - **Sharing and networking opportunities amongst forum participants;**
 - **Overviews trends and strategic directions emerging relative to recreation and leisure services within municipal and other environments;**
 - **Provides theme specific training and development opportunities relevant to participants;**
 - **Provides workshops on strategic planning, governance, program evaluation, volunteer recognition and other topics of interest;**
 - **Undertakes consultation on and / or delivery of strategic directions, policy initiatives and related considerations that the City is engaged in and which could influence this service area.**

3.7 Financial and Funding Initiatives

OVERVIEW

A number of financial and funding perspectives were identified through the research and consultation program for the Master Plan. They range from transparency and community groups understanding, particularly related to user fees; to consistent expenditure envelopes; to the assigning of debt repayment to the operating costs of RIM Park; to fundraising, corporate sponsorship and related funding sources.

The City has been engaged on a long-term basis with fundraising as a particularly important capital funding component for major recreation facilities. Fundraising will continue to be important on a long-term basis, especially related to the pressures on recreation and leisure capital development funds availability and the overall capital funding capacity of the City.

One of the considerations involved the charging of over \$2.6 million per year to RIM Park as a lease payment. Capital development charges are not assigned within the budget to most other facilities. As a result, such a strategy skews the cost structure of RIM Park operations which could influence the user fees, coverage ratios and related factors, such as comparisons with other city facilities or comparisons with facilities in other communities. This appears to represent an anomaly within the budgetary process.

Another consideration could be the application of capital surcharges on rental fees for sportsfields, arenas and related spaces. This is a strategy that is becoming increasingly utilized in such communities as Burlington, Pickering, Oshawa and other centres, even in smaller centres such as the Municipality of Strathroy-Caradoc. It is also a strategy under consideration for the new arena facilities in the City of Stratford. Such a strategy is used to fund capital rehabilitation and renewal costs, and in Burlington, funds new arena development.

A further consideration from a financial perspective, would be to align the Department's budget to reflect any reorganization that may be occurring, so that management and supervisory accountabilities related to budget management are based on discreet envelopes of responsibility.

Recommendation: Financial and Funding Strategies

- **That the City continue to require significant community fundraising, corporate sponsorship and related community investments for the development of new facilities, facilities expansions or major facility renewals (not rehabilitation or systems replacement), particularly projects above a threshold cost of \$250,000.**
- **That the City consider and consult on the opportunities and risks associated with the use of capital surcharges on facility rental fees as a means to raise funds to support facility renewal and potential new facility development.**
- **That the City give consideration to removing the lease cost allocation charge to RIM Park from the operating statements and treat it as a capitalization cost similar to most other recreation and leisure facilities.**

4.0 RECREATION AND LEISURE SERVICES DELIVERY POLICIES AND STRATEGIES

4.1 Recreation and Leisure Services Policies

Several important policy areas relative to the delivery of recreation and leisure services have been incorporated into the Master Plan.

.1 USER FEES

OVERVIEW

Over the last ten years, there has been a substantial increase in and focus on the development and application of user fees for municipal parks, recreation, arts, culture and leisure services. Municipalities have increasingly been under pressure due to services downloading from the provincial government, increasing infrastructure reinvestment requirements, health and safety considerations and an assortment of other financial pressures, that have caused them to increase user fees as a way to limit impacts on tax levels. As a result, user fees have grown steadily, often well above inflation, creating concerns related to fairness and equity, affordability, access and related considerations.

Several key trends were identified in the Situational Analysis Report in regards to significant increase in user fees. In summary, these are as follows:

- Increasing demand for more preferred ice, floor and field times by adult users, especially as they pay increasing fees. This trend challenges the traditional notion of youth first allocation preferences and youth having earlier times due to homework and sleep times;
- Concerns related to affordability, especially for families wishing to place their children in minor sports and other leisure programs;
- Growing financial pressures on families over a wide range of household cost increases, resulting in some expectations that municipal recreation and leisure services should have a lower cost and be supported by significant community investment;
- Increasing concerns amongst some community service providing organizations, particularly ice groups, related to why those organizations are expected to pay higher coverage rates for

the cost of the facilities they use compared to other groups, such as sportsfields, arts and culture, etc. which is identified as a fairness and equity issue;

- The ability of emerging recreation and leisure activities to be able to launch themselves in the initial years if the venue cost structure is too high.

One of the primary characteristics of recreation and leisure services user fees in virtually all communities, is that they are ad hoc, have evolved historically over time based on special relationships and arrangements and have little or no connection to the cost of the service's delivery. This statement reflects a general perspective, though specific user fees may be connected to other criteria. In more recent years, there has been increased use of targeting certain user fees areas for above inflation increases and to increase coverage ratios. A coverage ratio is the revenue as a percent of service delivery cost. However, what constitutes a cost in the formula is highly variable related to direct costs, department administrative costs, corporate overhead costs, facility reinvestment costs, etc. These cost structure components to support policy development will need to be finalized and approved.

Several municipalities, Windsor, Burlington and others, have undertaken investigations and strategies to assess whether a cost driven user fee model can be achieved. There can be significant challenges, but it does represent a potentially important platform upon which to develop user fees in the future, establish policy directions and targets to ensure alignment with key principles, such as fairness and equity.

A further contribution to this User Fee Policy initiative is to determine the ability to achieve more cost efficient net financial outcomes within Department operations. Investigations in support of this policy should assess all opportunities to reduce operating costs and increase revenues. Two of the proposed principles in support of the policy, ie: maximum utilization and cost effective operations are incorporated to support enhanced financial results. Revenues can be increased if more time / spaces can be rented. Cost efficiency contributions could potentially be realized via the proposed Department reorganization and repositioning initiatives and in the application of the Leisure Services Policy Framework.

Implementation of all Master Plan policy, service delivery and organizational recommendations will directly influence Department operating costs and fees.

The User Fee Policy has specific linkages with other policy areas, specifically City investments involving facility and sportsfield fees subsidies to support low income and other populations' participation in recreation and leisure activities. All these policies need to be integrated to ensure consistency, fairness and equity, effective and user friendly implementation approach.

Recommendation: User Fees

- **That the City of Waterloo undertake a comprehensive assessment and development strategy associated with program, services and facility user fees that results in:**
 - **User fees being increasingly based on the cost of service delivery, with costs incorporating direct costs, department overhead allocations and facility renewal / reinvestment charges;**
 - **Fairness and equity amongst all user groups be established within the user fee development model related to the design and application of the fee development formula;**
 - **The model establish clear coverage targets by service area, as well as for the overall Department as a basis to establish fees and budgetary directions;**
 - **Staged implementation strategies of up to five years, where appropriate, to support major increases in fees so as not to dramatically impact user groups in the short term;**
- **That the user fee policy framework be based on the following key principles:**
 - **Fair and equitable City user fee development;**
 - **Maximum utilization of facilities;**
 - **Maximum revenue generation from ancillary income sources;**
 - **Direct benefits realized and the cost of delivery;**
 - **Transparency and simple to understand;**
 - **Cost effective facilities and program operations by the City.**
- **That the overall user fee policy development program ensure stakeholder consultation in regards to the development of its key principles and approaches;**

- **That user fee strategies also reflect market-based strategies, such as multiple price points to balance utilization levels and to maximize income in high demand categories;**
- **That the user fees be reviewed annually and assessed at a minimum every three years as to the cost inputs to the formula.**
- **That policies on organizational and individual participant financial support related to user fees be aligned with and considered as per the specific recommendations on these topics in Sections 4.2.3 and 4.2.4 of the Master Plan.**

Fairness and equity are key principles for User Fee Policy development. The intent of these terms is to ensure, that as a public funded and / or support initiative, available leisure services are not priced to benefit certain user groups over others, that is all groups are treated in a similar way. Also, these terms are intended to ensure all residents as taxpayers have access to, can participate in and realize the benefits of leisure activities no matter their ability, background or other considerations. Various recommendation in the Master Plan in support of Individual Financial Assistance, Inclusion and other themes are important linkages in shaping the User Fee Policy.

.2 POLICY DEVELOPMENT INITIATIVES

OVERVIEW

Through the course of the master planning process, including both the Situational Analysis and the Options and Alternatives phases, the need to either undertake existing policy reviews or pursue new policy development initiatives was identified. The areas of policy consideration that emerged involved:

- Public accessibility;
- Maximizing revenue generation;
- Fairness and equity in resources allocation;
- Evaluation and monitoring.

A significant consideration from the Situational Analysis Report, was the need to develop a policy framework to balance public accessibility to major facilities and support broad-based participation

with the need to maximize revenue generation in order to more effectively manage the cost impacts of major recreation and leisure facilities on taxpayers. Achieving a balance in this regard was preferred but within a structured and workable policy framework.

Recommendation: Policy Development Initiatives

1. *Balancing Public Accessibility and Revenue Generation Goals*

- **That a policy be developed related to integrating and balancing the competing perspectives of public accessibility and maximizing revenue generation from major recreation and leisure facilities, focusing on the following components:**
 - **Ensuring public accessibility at viable times in support of low or non-programmed activities, such as public skating, unstructured sportsfield utilization and related uses;**
 - **Giving preference to minor sports, youth and other special needs groups within selected timeframes for regularly scheduled and program-based activities;**
 - **Maximizing opportunities beyond targeted groups allocations for adult and other activities that generate higher fees;**
 - **Developing a tournament, shows, event and festivals component that supports service provider goals on program diversification / variety and fundraising, but within limits that do not displace key points of accessibility, such as public skating, and has clear displacement parameters related to impacts on regularly scheduled activities involving space reallocations, number of reallocations per year, replacement facilities access and related considerations;**

- Giving consideration to full or partial consolidation of tournaments, shows, events and festivals at selected facilities, such as RIM Park and the Waterloo Memorial Recreation Centre ensuring regularly scheduled programming is not inappropriately disrupted;
- Developing the context of the financial coverage targets established annually and as approved by Council for its recreation facilities;
- Ensuring evident linkages are made between the user fee, fairness and equity, special populations and other key City policies;
- Developing policy using best practices analyses, community organization consultation and technical assessments on utilization, revenue generation and related profiles and inputs.

2. Facilities Allocation

- That current policies, particularly the facilities allocation policies, be reviewed or developed to ensure the following key value considerations are incorporated:
 - Fairness and equity amongst all user populations;
 - Inclusion and openness;
 - Support of emerging recreation and leisure services and for less developed or known programs and services;
 - Enhancing participation involvement for new Canadian, residents with physical and other challenges and other populations who require integration supports to facilitate equitable participation.

3. Policy Format

- That consideration be given to developing policies based on the following framework in order to establish a consistency of format and presentation:
 - Policy rationale and need;
 - Policy principles and foundation;

- **Policy statement and content;**
- **Operational procedures and standards;**
- **Linkages to all regulatory and / or statutory acts or legislation, regulations and other City policies;**
- **Implementation and monitoring procedures;**
- **Mandatory policy review, potentially every five years;**
- **An amendments tracking capacity.**

4.2 Recreation and Leisure Services Delivery Strategies

There are multiple approaches relative to recreation and leisure service delivery strategies for the City. The following material identifies priority services delivery strategy.

.1 DATA COLLECTION, ANALYSIS, EVALUATION AND PERFORMANCE MEASUREMENT PROGRAM

OVERVIEW

Currently, some of the City's statistical gathering formats are not as comprehensive or offer the needed depth of analysis necessary to formulate and support investment or policy-based decisions and services evaluations. At the level of complexity that is being experienced, an enhanced data collection and analysis system needs to be considered. Complementing the data collection process, is the need for an ongoing monitoring process to ensure that the benefits cited are being realized, risk is not being unduly experienced and preventative actions can be taken prior to major problems evolving. Complementing this initiative, is the need to develop a performance measurement and reporting system as a means to align goals, priorities and intended investments being made with the outcomes and the benefits desired.

This latter consideration becomes increasingly important as non-profit organizations become more invested in facilities, service delivery leadership and other considerations. Also, in order for the City to fulfill its service sector planning and integration role, it needs quality data and analytical tools to support these tasks.

Recommendation: Data Collection, Analysis, Evaluation and Performance Measurement

- **That a comprehensive review and further development of the Department's data collection, analytical, evaluation and performance measurement activities be undertaken, to ensure increasingly relevant, accurate and timely data to support current and future-oriented operational and strategic priorities identification, decision-making and performance management, with emphasis on:**
 - **The City's recreation and leisure services operations to ensure that revenues are being optimized, expenses are being minimized and participation opportunities are maximized.**
 - **Identifying and responding to changes that are occurring in the recreation and leisure services and regional markets that could influence future participation patterns and which might impact financial results, related to reduced revenues, increased expectations or other changing market conditions.**
 - **Supporting organizations that the City is significantly connected with in terms of grants or related to the potential impacts if the organization were to cease operations or run into a major organization or financial challenges.**
 - **Assessing service trends, government policy initiatives, evolving societal priorities and other service influences as key impacts to ongoing strategic analysis and services development.**
 - **Developing and applying performance measurement criteria, targets and reporting on the results achieved.**

The data collection and evaluation initiatives need to reflect both operational and strategic level analyses.

.2 PARTNERSHIPS / JOINT VENTURES**OVERVIEW**

Over the last ten to fifteen years, there has been considerable discussion and experimentation with partnerships, joint ventures and other initiatives. Some have worked, and others have failed to

materialize due to the rigors and risk management requirements that are often in place. This is an area that the City may wish to increase use of where opportunities exist. However, to increase the use of these strategies will require some form of increased flexibility and risk taking. The City will need to assess the levels of risk and their reasonableness on a case-by-case basis. However, it is becoming increasingly demonstrated that partnerships and joint ventures have the ability to expand the array of recreation and leisure opportunities, reduce financial pressures on a municipality and provide other benefits. However, they also require the development of new skills in terms of contract management, partnership evaluation and supervision and other inputs, along with enhanced risk taking and other change perspectives.

Recommendation: Partnerships and Joint Ventures

That the City actively continue to lead and / or support partnership, joint venture and related initiatives where:

- **Need is identified and demonstrated;**
- **Public access and affordability are assured;**
- **The partnership arrangement is financially sound and sustainable;**
- **The scope of City investment is reflective of the benefits to be realized by Waterloo residents.**

.3 COMMUNITY FUNDING SUPPORT PROGRAM

Currently, in 2008, the City of Waterloo is scheduled to grant approximately \$1.3 million to various community organizations and services. Some \$185,000 of this amount is allocated to community cash grants, \$110,000 in support of a contract with the City of Kitchener for special needs populations, \$31,000 to other groups and nearly \$1.1 million for rental adjustments, primarily to minor sports organizations.

Via the consultation program, there was considerable identification by community organization representatives about the challenges associated with the community granting programs. The degree of administrative work to prepare submissions was universally identified as a concern. The significant emphasis on minor sports which constitutes by far the largest component of the granting program; the lack of capital funding support within the program; challenges faced by the

ethnocultural, arts and culture groups; along with emerging recreation and leisure services were cited.

In 2007, the Department commissioned, jointly with the City of Kitchener, a Benchmarking and Best Practices Research Study identified that in 2006 approximately 80% of the funding was secured by 20% of the eligible organization. Within the same study, but using a broader definition of City contributions that also incorporated goods-in-kind, the overall contribution was just under \$2 million, of which 50% went to sports and recreation and 25% to arts and culture, just under 20% to human and social services and the residual amounts to environment and unspecified sources.

The City of Waterloo, while reviewing current granting practices may consider aggregating all its contributions and subsidies into one envelope. This is a contemporary approach that is a best practice and which many other communities are examining, particularly in regard to moving to one integrated investment-based funding strategy. It allows Council and management staff to capture a comprehensive understanding of the total investments being made in recreation and leisure services relative to community funding support. It also allows major recreation facilities to operate more on a business model in order to determine their true financial performance. This would also be an important factor when assessing the financial performance of the City of Waterloo's major recreation facilities compared to other communities, in that in many other communities, discounts associated with minor sports ice, sportsfield or floor allocations are absorbed by the individual facilities, therefore reducing revenues and the coverage percentages for these facilities.

Another consideration in the area of community investment funding, is the fact that there is significant preference through the consultation programs with all stakeholders, to increase the role, impact and scope of community service providing organizations as the principal recreation and leisure service providers. In this light, this direction will intensify the utilization of volunteers, the need for strong voluntary governed organizations and increasing community development and organizational supports to ensure the enhanced stability and performance of these community organizations as the principal player in the provision of a balanced array of recreation and leisure programs and services for the residents of Waterloo. It needs to be recognized, that additional investments in terms of both staffing support through community development and capacity building initiatives, and annualized and capital funding support will need to be considered by the City in order to create a more dynamic but sustainable service delivery model in Waterloo. It also is important to note that it is often more cost effective for a municipality to invest in community-based service delivery organizations than to undertake the direct delivery of recreation and leisure programs themselves. Therefore, the need to increase funding support to community groups will need to be considered in order to invest in the proposed recreation and leisure services delivery model.

Recommendation: Community Funding Support Program

FRAMEWORK

- That the City of Waterloo reposition its various community funding strategies into an integrated and consolidated Community Partnering and Investment Fund for Recreation and Leisure Services.
- That the City consider raising total investment within the fund from the approximate \$2 million level currently undertaken, to \$2.5 million by the budget year 2013, using \$100,000 per year increments.
- That the Community Partnering and Investment Fund be structured to have the following separate targeted investment components:
 - Funding support for youth ice, field, floor and other facility use on an consolidated basis for all City recreation and leisure facilities;
 - Operational funding support for qualifying recreation and sports organizations;
 - Operational funding support for qualifying arts, culture and heritage community groups;
 - Operational funding support for special needs populations, including those with disabilities, new Canadians and related groups for group-based programming;
 - Operational funding support for emerging recreation and leisure activities within their first three years of development, after which any eligible funding support would be derived from the other appropriate categories;
 - A capability to fund one time initiatives consistent with City priorities and the Department's Mission and Principles with a funding cap so that such initiatives do not overwhelm the investment resources available;
 - A capital funding support program for requests between \$2,500 and \$25,000. Any Council considerations related to requests greater than \$25,000 would be undertaken outside of the Community Partnering and Investment Fund;

- **Operational funding for qualifying events and festivals up to a maximum of \$10,000, after which any additional funding support approved by Council would come from outside of this program.**

FUND TERMS OF REFERENCE AND CRITERIA

- **That the City authorize the development of a comprehensive Terms of Reference for the Fund in terms of key community investment and development principles, along with eligibility criteria and limits for each funding category, based on the following possible principles and criteria:**
 - **Over 75% of an applying organization's participants are residents of Waterloo;**
 - **The organization has evident community linkages in terms of a volunteer Board of Directors and is a non-profit corporation;**
 - **The organization has been operating for more than three years within the City of Waterloo as the principal venue for its services, except in regard to emerging recreation and leisure programs and services;**
 - **The organization and its services are assessed as being sustainable;**
 - **Participation is open to Waterloo residents without undue limitations;**
 - **An upset funding limit be identified so that no one group receives a disproportionate amount of the annual funding available;**
 - **Preference be given to targeted populations in each category related to youth and teens, older adults, new Canadians and individuals with barriers to participation;**
 - **Event and festival funding support would be based on City approval of the event and the City is not the lead sponsor;**
 - **Applicants being able to identify evident benefits of their recreation and leisure program related to the Vision, Mission and Principles of the Recreation and Leisure Services Department and the City of Waterloo.**

- **That the application process be developed in a way that streamlines the amount of submission effort required, reutilizing previous application materials where no changes have occurred since that previous application. The grant process should be flexible in determining how financial support is provided based on procedures that are the most helpful to an applying group.**
- **That the Community Partnering and Investment Fund be reviewed every three years relative to:**
 - **Level of requests, funding availability and funding support delivered;**
 - **Reassessment of thresholds, targets and limits within the program;**
 - **Changing trends and needs profiles;**
 - **Consultation input as to how the program could be enhanced.**

The proposed increase in financial resources for this initiative does not involve only new funding by the City. In developing the financial model, consideration needs to be given to sourcing funds from the proposed reorganization of the Department and the impact of the Leisure Services Policy Framework, the User Fee Policy initiative, enhancements in cost efficiencies, increased revenues and other means. These initiatives will require time to be fully developed and implemented. Therefore, a multi-year growth strategy is proposed. The capacity to redistribute existing funding will be dependent on how comprehensively many of the proposed change initiatives within the overall Master Plan are undertaken.

.4 INDIVIDUAL PARTICIPANT FINANCIAL SUPPORT

OVERVIEW

Most municipalities and not-for-profit community recreation and leisure services providers have developed over the years, a financial subsidy program for individuals, families and other groupings who do not have the financial means to pay participant fees but who would clearly benefit from participation. Many minor sports programs have developed internal resources or have worked with service clubs and other bodies to generate the funds necessary to reduce or waive fees in order to facilitate the participation of children from low income families or other challenging situations. This form of investment is vitally important in order to support the principles of inclusion, fairness and equity and in supporting the personal well-being and healthy lifestyles of all residents.

The City of Waterloo has been active in this area of individual participant investment and needs to continue that role related to its direct recreation and leisure programs and services. It is also in the position, to work actively through its community development role, to identify the needs and to assist community organizations in ensuring that they have this capacity available to support broader and more inclusive community access and participation.

Recommendation: Individual Participant Financial Support

- **That the City continue its involvement in offering individual participants financial support to access leisure programs for its directly delivered services, based on the following principles:**
 - **Evident benefit to qualifying participants;**
 - **A reasonable assessment of the financial or other limitations that are barriers to participation;**
 - **Selective tracking of financially supported participation to ensure engagement and to assess the benefits realized;**
- **That the individual participant financial support program be positioned outside the user fee policy of the City in order to separate participant financial subsidies from revenue generation targets;**
- **That financial support offered to individual participants be aligned with their assessed capacity to fund portions of the fees applicable;**
- **That the financial support program be positioned within formats and strategies that ensure awareness of this opportunity and be subject to budgetary approval;**
- **That an annual report, consistent with Freedom of Information Act requirements, be provided to Council on the level of participant financial support provided by:**
 - **Program and / or service;**
 - **Full or partial fee contributions;**
 - **Individuals, families and age profiles.**

- **That through the City's community development role, it actively promote, and where possible, provide advice and direction to community service providing organizations to develop the policy framework and the resources necessary to facilitate the participation of individuals or families who have limited financial capacity and who would otherwise benefit from program participation.**
- **That the City not provide direct funding support to community service providing organizations for this specific need, except through the Community Partnering and Investment Fund for emerging organizations relative to individuals and families, or through the rental fee adjustment program for targeted group activities, particularly those who have physical, intellectual or other relevant life challenges.**

.5 COLLABORATIVE, SHARED SERVICES

OVERVIEW

One distinctive characteristic of organized recreation and leisure service in Waterloo involves participation patterns with or by residents of Kitchener and the two neighbouring Townships. The prevalence of broader municipal organizations and / or regional service organizations is evident with numerous K-W, Twin City or Regional organizations providing services to Waterloo residents. Over the years, shared services agreements have been established with local school boards and universities, neighbouring municipalities and non-profit organizations and institutions.

Some neighbouring municipalities are developing a wide range of new recreation and leisure facilities, policies and planning initiatives that will impact recreation and leisure services delivery and investment in Waterloo, such as the new Kitchener twin pad arena and boxing club. Sometimes, the rationale for these facilities and plans are to attract users from other municipal jurisdictions in order to create the volume levels that warrant the investment. Also, some of these single municipal investments can result in regional market overcapacity.

Beyond neighbouring municipal services, are also evident recreation and leisure services available through Wilfrid Laurier University and the University of Waterloo which give focus and priority to university community needs. Currently, Wilfrid Laurier University operates a six lane, 50 metre indoor aquatic facility, now scheduled to close December 31, 2008, and University Stadium. The University of Waterloo has the Columbia Ice Fields and field house, soccer fields, an indoor 25 metre swimming pool and an array of other facilities. Informal identification has been made of

longer term plans for a new indoor aquatic facility and related facilities. In addition, the Waterloo Soccer Association has identified potential opportunities for soccer field development in conjunction with the University of Waterloo.

Another consideration, is that the Community Adult Recreation League Program (CARL) operated by the Department of Recreation and Leisure Services has been successful. Growth opportunities are now under consideration related to expanding the program to incorporate league play in neighbouring municipalities. A significant portion of the players within the CARL program come from the City of Kitchener and the neighbouring Townships, with anecdotal information in regards to participants from Guelph and further afield. Opportunities may exist to expand CARL in Waterloo via field lighting and enhanced marketing supports. This strategy should be the first priority for this program.

In the arts and culture area, particularly related to audience and visitation-based activities, regional markets become critically important in developing such programs and associated facilities and their sustainability. Waterloo-based venues, such as the Canadian Clay and Glass Gallery have attempted to generate broader financial support from neighbouring municipalities but without success, even though some one-half of the visitation base comes from neighbouring municipalities.

The recreation and leisure services market at certain levels operates on a Twin Cities, regional or even broader geographic market parameters. Also, one municipality developing high cost facilities, such as major aquatic centres of 50 metres or larger context, would be absorbing major capital and operating costs even though the user base would come from a much broader geographic area. Therefore, the potential to move towards a more multi-municipal approach in selected service areas needs to be considered in order to effectively respond to market demand characteristics and to reasonably assign capital and operating cost considerations.

It is recognized, that joint planning on a multi-municipality basis can be challenging and raise sensitivities. However, with the cost of recreation and leisure services facilities and services, a question needs to be addressed as to whether there is an alternate delivery model or models that more intensively integrate recreation and leisure facilities and services amongst neighbouring municipalities. The key issue is, can service delivery models be developed that better utilize existing facilities, reduce the need for additional facilities and reduce overall capital and operating costs when the market behaves significantly differently than how the current service delivery model operates, i.e.: on a municipality by municipality basis.

Recommendation: Collaborative, Shared Service

That the City of Waterloo pursue initiatives to enter into discussions with neighbouring municipalities, local school boards and universities and non-profit organizations to explore whether a more integrated services delivery model could be developed and implemented to facilitate increased public accessibility to recreation and leisure services, and generate improved operational and investment outcomes for all parties involved.

This strategy could be a significant initiative as the capital cost and annual operating cost considerations and the market behavioural characteristics warrant a more reasoned and methodical effort in selected recreation and leisure service areas based on a broader geographic delivery model.

When one considers that single pad arenas are costing in the \$8 million area, indoor aquatic facilities can cost from \$7 to \$20 million and major sportsfields complexes are multi-million dollar operations, all of these venues with significant potential annual operating deficits, the ability to achieve greater multi-municipal capacities on a single site and potentially build fewer facilities while still providing adequate service levels to the overall market, could have significant financial benefits for all involved.

.6 FACILITIES PROJECT DEVELOPMENT

OVERVIEW

Waterloo has undertaken important recreation and leisure facility developments based on various inputs, assessments, etc. A Business Plan model for individual facility initiatives has been used by the City. Many communities have this as a requirement prior to final decision-making on major capital investments.

A Recreation and Leisure Services Master Plan is a process that brings together significant amounts of research to identify priorities, needs and strategies over an extended period of time, in this case, twenty years. It identifies not only facilities but also criteria, strategies, etc. However, Master Plans do not, in and of themselves, typically deal with the policy development and Business Plans for individualized recreation and leisure facility initiatives due to the changing characteristics of the market and demand over time, community growth patterns, trends, the municipality's financial resources and commitments, etc. The Master Plan sets the overarching facilities development framework for recreation and leisure services and priorities. Then, individual Business Plans may be

undertaken based on timelines established within the Master Plan and the City's business case template. A Business Plan should focus on:

- Assessment of partnerships, joint ventures and community-based development and delivery opportunities;
- Locational considerations, principles and evaluation;
- Connections to City and Department Strategic Plan goals, policies, objectives, etc.;
- Alternative development strategies in terms of redeveloping existing facilities, building new facilities, undertaking additions, etc.;
- Need and demand profiles, marketing requirements, etc. and related feasibility assessment components;
- Determining competitive market profiles, etc.;
- Identification of space and size needs and special equipment, often involving conceptual / simplified floor plans;
- Identification of the total square footage as a basis to develop more detailed capital costs and funding sources;
- Three year operating pro formas in order to identify annual revenues, expenses, staffing requirements, etc.;
- Governance and management plans.

These and other elements are developed to focus on a specific facility. This is an excellent strategy in order to ensure these major capital investments are targeted with clear outcomes, sound capital cost projections and other key outcomes.

Recommendation: Business Plan Development Applications

That the City of Waterloo continue to require a Business Plan for all capital recreation and leisure service proposals as follows:

- **Any new facility or servicing initiative or major addition to an existing recreation and leisure services with a potential capital cost of over \$250,000 be supported by a comprehensive Business Plan.**
- **The City direct the undertaking of the Business Plans, seeking broad-based public consultation, and working within partnerships where appropriate with community proponents and participants.**
- **The results of the Business Plan, when finalized and accepted, become the basis for a new or expanded recreation and leisure service being incorporated into the ten year capital budget forecast for the City related to timing, capital cost projections, City role / involvement, etc.**
- **The capital cost projections should be reviewed regularly and re-incorporated into the City's ten year capital cost forecast program in order to respond to:**
 - **The potential impact of inflation that may not be predictable or certain over time.**
 - **Any subsequent alterations in a proposed facility's design or use which should be approved by Council first as to rationale and need for the changes.**

.7 MULTI-USE / MULTI-PARTNER FACILITY DEVELOPMENT**OVERVIEW**

Over the last decade or more, there has been a significant move towards the development of recreation and leisure facilities on a multi-use / multi-partner basis. The key rationales for this strategy are as follows:

- Potential capital cost savings, often in the order of 10% to 25%;
- Significant potential for operational savings, up to 25%;

- Improved, more cost effective marketing opportunities and approaches;
- Enhanced customer / user satisfaction relative to convenience and visiting one site only as an individual and/or a family;
- Greater critical mass, visibility and community identification;
- Potential for enhanced facilities development relative to scope, quality and participation volumes.

There are significant benefits to this strategy and it can be creative in its application. These facilities can involve arenas, community centres, branch libraries, school facilities, social service facilities, community policing offices, fire stations, transit depots, etc. The City has utilized this model on several occasions.

Recommendation: Multi-Use / Multi-Partner Approaches

That the City of Waterloo, for all major recreation and leisure facility renewal and new facility development initiatives, investigate in depth the potential for a wide range of multiple use opportunities within a single facility venue, as well as multi-partner participation.

.8 COMMUNITY USE OF SCHOOLS

OVERVIEW

Community use of schools has been a long established practice in Ontario and many other jurisdictions. Due to the significant expansion of public schools, colleges and universities, taxpayers have supported the development of a wide array of facilities that have significant potential to support recreation and leisure activities. These facilities include gymnasiums, resource rooms, outdoor sports fields, specialized facilities, classrooms, etc., and at universities and colleges can include arenas, aquatic centres, gymnasiums, etc.

Since the mid 1990s, there has been a significant decline in the community use of schools due to the gravitation towards increased fees for utilization, customer service challenges, accessibility consistency concerns and other issues. Some communities have divested their responsibility to coordinate community group use of these facilities, while others have experienced significant

challenges in regards to their user groups wishing to develop more stand alone or separate municipal facilities as a substitute for school accessibility.

In the summer of 2004, and again in the spring of 2007, the Province of Ontario announced a \$20 million program as part of an overall initiative to facilitate and encourage increased utilization of publicly funded schools by community organizations, especially in higher risk neighbourhoods. Considering that these facilities are built by the same taxpayer, and that there is a wide array of gymnasiums and recreation and leisure indoor and outdoor facilities, these venues represent a potential resource for recreation and leisure programming, often located in neighbourhoods.

Relative to outdoor recreation facilities, school venues can offer sportsfields, playgrounds and open spaces. In some older communities, school sites are sometimes the principal source of parkland and green space, and therefore, have added value and importance.

Sportsfields on school sites can sometimes augment facilities often found in park areas, a position presented by the Waterloo Citizen's Environmental Advisory Committee. Such a strategy can reduce certain user drive times. Also, using existing resources, can potentially reduce the potential need for additional publicly-developed facilities. Efforts should be made to maximize the use of existing school-based sportsfields where feasible. However, such a strategy also needs to recognize the limitations of such sportsfields related to low School Board maintenance, fields of limited quality, neighbour land use conflicts (lights, noise, ball intrusion) and the preference of some sportsfield organizations to consolidate use on a few venues.

The City has taken leadership to explore with the local school boards with facilities in Waterloo, the opportunity for municipalities and local services providers to access publicly funded schools in order to provide more local recreation and leisure facility capacity and to reduce the pressures and need for additional long-term municipal investments in stand-alone recreation and leisure facilities.

Advantages related to the public use of schools include:

- More extensive use of existing public-owned facilities;
- Good locations in proximity to neighbourhood and district populations;
- Reduced need for municipal capital investment;
- Access and on-site parking is available;
- Local residents are often familiar with the venues.

Recommendation: Community Use of Schools

- **That the City of Waterloo continue to explore with local School Boards strategies and protocols that would effectively increase community accessibility to publicly funded schools for recreation and leisure uses as a key support and service to both community service provider organizations and for City services.**
- **That the City actively work with Wilfrid Laurier University and the University of Waterloo to determine the level of student recreation and leisure available, gaps in services that the community may wish to respond to, access student expertise and volunteer resources and potential facilitation of community use of university facilities, resulting in a more integrated service delivery model across Waterloo.**

The two universities in Waterloo have extensive recreation and leisure facilities, primarily in the sports sector. They are of provincial and national quality in many regards, and have hosted both intramural and varsity play for the two universities, but also extensive tournaments and meets. Aquatic, gymnasiums, stadium, arena and sportsfield facilities exist in considerable strength and support related resident interests in Waterloo. It is recognized, that these facilities are built by the universities for their students and that student access is the priority. However, a question emerges as to whether there are opportunities to facilitate community access. Such access could reduce pressure on the need for additional community developed facilities.

A further consideration in regards to the universities, is the extensive expertise and potential volunteer pool that exists within their staff and student populations. Actively working with the universities and developing strong relationships in this regard, could be beneficial to many community service providing organizations in support of their program reviews, direct delivery of programs and related activities. The City has a unique role in potentially facilitating access to university resources on behalf of all the service providing groups and its residents where feasible.

5.0 RECREATION AND LEISURE FACILITIES AND SERVICES

5.1 Introduction

As with any growing community, and related to the trends in recreation and leisure services sectors, there are evolving, facility and related needs that will arise over twenty years. Many of these facilities will require a range of capital investments, could impact annual operating financial requirements and need to support key municipal priorities and strategic directions.

For the City of Waterloo, considering a twenty year planning horizon for this Master Plan, a wide range of recreation and leisure facilities has not emerged primarily due to the significant high level and high quality recreation and leisure facilities that exist within the City. At this time, there is significant capacity in place, and the facilities are distributed across the community. However, some gaps and needs have been identified that will need to be considered via Business Plans, facility development and implementation over the life of the Master Plan.

5.2 West Area Multi-Use / Multi-Partner Complex

OVERVIEW

One of the key initiatives that has emerged, is overcoming a gap in major recreation services within the west area of the City which was widely identified as a servicing priority. This initiative also relates to expanding the number of soccer pitches available to serve one of the faster growing youth and adult sports, which is both a short and longer-term planning priority.

The major recreation facilities initiative within the next five years for Waterloo is the potential development of a west area recreation complex, with both indoor and outdoor facilities within a multi-partnered environment. This initiative is supported by the Master Plan based on the needs identified, gaps in services and the Principles supporting the Master Plan. If this initiative cannot be sustained on the currently proposed venue, then an alternative venue should be assessed and acquired as available. It is also preferred, that both indoor and outdoor considerations be developed collectively as a basis to maximize economies, land use, ancillary supports and related considerations. However, if a land base cannot be achieved to support both the indoor and outdoor components, adequate land would need to be secured for both dimensions.

Soccer is the fastest growing registered youth sports activity across the country. It is also anticipated that there will be significant growth in adult soccer for both men and women. Minor Soccer Associations across Ontario have identified needs for additional soccer pitches. Several

municipalities are increasingly moving towards one soccer field that is of stadium quality that provides both a platform for a centre of excellence and to host sport tourism events. Soccer pitch upgrading with lighting, irrigation and better drainage is an increasing strategy to facilitate enhanced field quality. Also, movement to artificial turf pitches is being seen in Burlington, Oakville, London and other centres and amongst some school boards, including the Waterloo Region District Catholic School Board, as a way to increase the capacity of existing fields, along with lighting.

Recommendation: West Area Multi-Use / Multi-Partner Complex

- **That a west area multi-use, multi-partner recreation and leisure facility as currently proposed be pursued in order to respond to the needs of the growing population on the west side of the City, providing aquatic, branch library, gymnasium and related community level indoor program spaces.**
- **That a venue for the proposed west side facility be able to also incorporate the development of three soccer pitches based on soccer user groups size and access needs, of which at least one pitch would be a multi-use field for football, rugby and related field sports, and two pitches would be lit over time to increase capacity and displace future land and field development requirements, to be developed in conformity with the outcomes of the Environmental Assessment decision.**
- **That a location for a second venue be finalized by 2010 to support additional outdoor soccer field requirements in the west area, with sufficient parkland to support the development of two to seven soccer fields, of which two would be multi-use fields, either in partnership with the University of Waterloo, the use of school board fields, the Grand River Conservation Authority or other organizations with lands in the area, or as an addition to planned City park areas.**
- **That consideration be given to lighting and artificial turf strategies in order to generate intensified use capacity, that can reduce longer term field development needs and supports the benefits of clustered field operations as the first priority of a fields development strategy in Waterloo.**

- **That consideration be given to the establishment of one field as a centre of excellence venue with stadium capacity to support sport tourism, partnering and related initiatives, incorporating seating, change room, artificial turf, spectator amenity, field lighting and related features and capacities. A field in the west area or at RIM Park should be considered.**
- **That the number of soccer fields to be developed would incorporate replacement pitches for any reduction of soccer field availability within the Bechtel and Waterloo Parks Master Plans.**

5.3 Skate Board Plaza

OVERVIEW

A significant contingent of skateboard participants attended various community sessions. They have identified an opportunity to develop a skateboard plaza with a preference for a central location within the City. Skateboarding has evolved significantly over the last decade, and now involves more participants in the 20 to 30 year age category, with it not being uncommon for individuals in the 30 and 40 year age ranges to also be participating. A skateboard plaza allows for a self operated, safe and integrated model that addresses various levels of abilities.

Today, most municipalities over 25,000 residents, would have one or more skateboard parks of various designs, capacities and locations. Skateboarding has reached a point where it is a mainstream activity and supports a large contingent of users on a seasonal basis. Development of such a facility would respond to an evolving need, could reduce the impact of skateboarders operating ad hoc throughout the community and give a centrepiece and a club perspective to the activity that would facilitate its growth, development and focus. Sites in the area of the Waterloo Memorial Recreation Centre or the Uptown area were preferred. The Moses Springer Community Centre was also identified as a possible location.

Any initiatives in this particular area would need to be based on significant consultation with the users due to their expert knowledge and the accessibility considerations that are vital to support their participation.

Skateboarding has evolved as a significant activity for a growing number of youth, particularly now involving more younger adults in the 20 to 30 age category, for which the City of Waterloo has not developed any facilities to this point.

Recommendation: Skate Board Plaza

- **That the City, working with user groups, undertake the development of a skateboarding plaza in a central location to facilitate the development and growth of this activity. The possible future development of smaller skateboard facilities in suburban areas also be considered in order to facilitate enhanced access to this sport.**

5.4 Area Splash Pads

OVERVIEW

Splash pads have become an important neighbourhood or small district facility to support younger children and to enhance accessibility to services for this age group.

The development of splash pads within three areas of the City on a district basis, would facilitate bringing the services closer to where people live and address a target audience of infants to children in the ten to eleven years of age category for summertime activities. These facilities are popular, replace the need for more costly outdoor wading pools or pool tanks and support ad hoc, non-programmed use. It is proposed that one facility be developed in the east, centre and west areas of Waterloo.

Recommendation: Area Splash Pads

- **That the City give consideration to the development of water parks / splash pads in three locations across the community as a means to facilitate more accessible, summer season, child-based recreational activities. Associated user fee considerations would be developed within the User Fee Policy recommendation of the Master Plan.**

5.5 Future Recreation Facilities

OVERVIEW

Also, longer term considerations related to ice, aquatic, gymnasiums and related facilities could emerge depending on population growth, program development demand trends, regional facilities development and related influences.

The recreation and leisure facilities identified would evolve over a twenty year period. They are not certainties at this time in their own right, as they would be developed based on demand indicators, funding availability, appropriate Business Plans, fundraising contributions, City strategic priorities and community support.

Arenas, indoor aquatic centres and community centres are often a major component of long-term recreation and leisure services master plans. In the case of Waterloo, significant facilities already exist within City or could be delivered in the future by universities, the YMCA and other providers. Also, the policy direction within this Master Plan moves the City more towards community development and capacity building and potentially less engaged in direct services delivery, with partnerships and joint ventures given a priority in terms of recreation facilities and programs development.

Growth continues to occur in regards to ice demand, particularly due to population increase and growth in girls hockey and related uses, with anticipated significant growth in the future related to women's hockey. Constraints on ice activities growth could evolve due to a more ethnically diverse population evolving within Waterloo, with many ethnic communities not having any previous history with ice-based activities, as well as the additional ice resources being developed within the region. Much of the area's arena market works from a regional perspective, particularly for adult activities.

Based on current servicing levels, one ice pad per 12,500 residents, not including the Columbia Ice Fields, immediate demand for additional ice is not seen as a priority, though there may be some latent demand that exists. Most municipalities the size of Waterloo, would have ice delivery ratios around one ice pad per 15,000 to 20,000 residents. As an example, currently Kitchener operates eight ice pads and will be adding two additional ice pads for a total of ten for the next ice season, providing a service ratio of one ice pad per 20,000 individuals. If Queensmount and Doherty Arenas were to be closed, this ratio would be increased. Also, Kitchener purchases significant ice at the Sportsworld Twin Pad which reduces the servicing ratio to one ice pad to 17,500 residents for a substantially higher ratio than in Waterloo. Ratios in Burlington, London and most other communities are within one ice pad per 15,000 to 20,000 residents.

Within an overall priority perspective, and based on the constraints on capital funding to the post-2016 period relative to Development Charges, there is not an immediate need or capacity to initiate new arena development compared to other priorities. However, within a twenty year perspective, there could be a need for new arena facilities in the last five to ten years of the twenty-year master planning cycle.

Additionally, with regards to aquatic facilities, the initiatives by the City alone are not an immediate priority, though there is a transition occurring within the overall aquatics facilities sector in Waterloo. Identification has been made that Wilfrid Laurier University will be closing their 50 metre facility on December 31, 2008, while the University of Waterloo may be giving consideration to the development of a new aquatics facility. With the potential development of a YMCA aquatic facility in the west end, the City is reasonably served for aquatic services at the recreational and learning levels but will need to give consideration on a longer term basis to a third aquatic facility, likely in east Waterloo. However, there has been multiple identifications through the Sport Tourism Strategy, the Master Plan and other forums, for the need for a larger aquatics complex to support sport tourism and competitive clubs involving swimming, diving, synchronized swimming and other uses. However, these audiences come from a regional perspective and any such facility should be given consideration at a regional level to reflect how that particular market operates. Potential alignment with any university initiatives should also be considered in order to ensure there is no duplication of facilities, and the facility designs align with the quality and capacity needs and preferences of each of the various levels of users involved in aquatics programming.

In regards to community centres, no additional community centres are identified as needed within the twenty-year planning horizon, due to the extensive array of facilities available at RIM Park, the Waterloo Memorial Recreation Centre, the Albert McCormick Community Centre and other venues. Additional capacity would likely occur relative to the proposed major recreation development in the west area of the City. The focus for future community spaces, within the Master Plan, is in regards to neighbourhood level servicing, using spaces that are already existing related to schools, churches, halls, clubhouses and other venues.

Recommendation: Future Recreation Facilities

- **That new City recreation facilities providing significant amenities be assessed in the future, post-2019, based on:**
 - **Evident need;**
 - **Regional supply;**
 - **City and overall service demand priorities.**

5.6 Sportsfield Operations

OVERVIEW

Another area of some concern was the limited framework in which sportsfields operations and use occur related to user roles and expectations, differentiated levels of service for regular and tournament use, management of rain deferrals and related areas of operations.

Recommendation: Sportsfields Operations

- **That the City undertake selected initiatives to enhance customer service via consulting with user groups on City levels of service and procedures in order to clarify City and user roles related to sportsfields, involving:**
 - **Differentiated regular and tournament maintenance level of ballfields;**
 - **Expectations of user groups in regards to variable field maintenance strategies for regular and tournament play;**
 - **Rain deferrals decisions, timeliness and communications;**
 - **Other elements that enhance overall field operations and use.**

6.0 PARKS, OPEN SPACES AND TRAILS

6.1 Acquisition of Surplus School Lands in the Core Area

OVERVIEW

Development trends for the City of Waterloo encourage intensification in the City's core area. This strategy will result in a greater number of dwelling units, a higher population and result in greater intensity of use of lands in central Waterloo. The Central District of the City, bounded generally by Fisher-Hallman Road North, Weber Street, Bearinger Road and the City of Kitchener boundary has the lowest level of neighbourhood parks per 1,000 population at 0.3 hectares. This reflects the fact that development occurred prior to legal requirements for parkland dedication within the Planning Act. As a result, neighbourhood park activities often occur on school properties, such as Elizabeth Zeigler Public School on Moore Avenue South.

At the same time, there is declining enrolment in elementary and secondary schools throughout the region and the Province of Ontario. There will be continuing pressure to close inner-city schools where they do not have sufficient pupil enrolment. A policy needs to be established to ensure that these school closings are seen as opportunities for the City of Waterloo to acquire additional parkland in the core. Such a strategy could result in several benefits:

- Retain existing public open space and uses in core areas that could be lost to site redevelopment;
- Provide opportunities for new playing fields and spaces;
- Accommodate growing populations due to residential intensification in the core area.

At the same time, the City of Waterloo has high levels of recreation facilities and may not require the former school buildings, parking areas and related facilities. Where the City of Waterloo considers acquiring these lands, opportunities should be given to the sale of the buildings, parking areas and portions of these lands, while retaining the playing fields and park spaces as a community asset. Special consideration should be given to safe public access, site maintenance and visibility from the street. The school buildings themselves could be sold to other institutional uses or redeveloped for residential opportunities.

Recommendation: Surplus School Lands

That the City of Waterloo assess opportunities as they arise to purchase surplus school lands from both the Public and Catholic School Boards with a view to retaining and / or expanding parkland for existing and future populations in underserved areas of Waterloo, working within partnership strategies whenever feasible.

6.2 Naturalization Areas

OVERVIEW

Through the course of the research for the Master Plan, a number of individuals and groups identified opportunities and preferences to naturalize portions of existing parks and open space. This approach is consistent with Official Plan policies that emphasize maintaining and enhancing the natural environment and may help reduce maintenance and operational costs where these areas require less ongoing care.

At the same time, at the Options and Alternative workshops, a number of participants identified concerns with expanding or creating new naturalized areas within existing parkland. Concerns related to the lack of maintenance relative to garbage, increased incidence of rodents, and other issues, such as weeds and additional pollen. As this issue was discussed at the workshops, participants generally determined that the level of naturalized areas in the City of Waterloo was sufficient. The balance of maintained lawns in comparison to naturalized areas was seen as sufficient. Furthermore, participants felt it was important to retain unstructured play spaces for non-programmed activities which increased naturalization could restrict.

There was a general consensus that naturalized areas located along the Grand River, creeks and around stormwater management ponds was acceptable and should be pursued. It was recommended that surrounding residential property owners be engaged in discussions on any renaturalization initiatives.

Recommendation: Park Naturalization

- **That the City of Waterloo continue to implement Council's policy of retaining naturalized areas located along existing water courses, wetland or woodlot sites. Significant expansion and / or the developing of naturalized areas, especially in neighbourhood areas, should not be considered unless it is clearly identified as an important extension of existing natural features and there is general community support.**
- **That where naturalization is proposed, the City will review its current policy on park naturalization to determine the impacts of potential changes and establish criteria for park naturalization, such as:**
 - **Community support;**
 - **Ability to ensure adequate active spaces in the park for current and future populations;**
 - **Consistency with the classification and intended service need for the park;**
 - **Ability to effectively overcome security, aesthetic and other challenges and concerns.**

6.3 Laurel Creek Conservation Area

OVERVIEW

The Laurel Creek Conservation Area is owned and operated by the Grand River Conservation Authority. The Conservation Authority is located in the northwest sector of the City and comprises approximately 293 hectares of land providing outdoor recreational and environmental education opportunities. This site was originally developed for flood protection purposes but has evolved into a key recreation, swimming, hiking, birding and non-motorized boating venue. It is also home to a nature centre facility and program

In cooperation with the City of Waterloo, the Conservation Authority has facilitated the development of a cricket pitch located on the east side of the Conservation Area. Over the next five to ten years, the Conservation Authority will be fully surrounded by residential development. As this development evolves, the community tends to assume that the Conservation Area, in its entirety, is

part of the City's network of parks, resulting in the Conservation Authority devoting resources to limiting trespassing, through staffing, signage and prosecutions.

Collaborative opportunities between the Conservation Authority and the City of Waterloo should be explored to determine a cost sharing framework to support pedestrian, bicycle and other non-motorized access to the Conservation Authority lands without the need to pay daily or seasonal entrance fees. The Conservation Authority and the City should also enter into discussions and potential negotiations to broaden public use of the Conservation Area beyond the cricket pitch and establish the venue as a possible broader-based public park and nature centre resource.

Recommendation: Laurel Creek Conservation Area

- **That the City of Waterloo and the Grand River Conservation Authority enter into discussions to explore the potential for improved public access to and use of the Laurel Creek Conservation Area as a community park and open space resource. These discussions could include:**
 - **Consideration of possible outdoor swimming, pathways, sportsfield and other services delivery within the Conservation Area;**
 - **Examining opportunities for cost sharing maintenance and operational arrangement;**
 - **Differentiate access fee arrangement for Waterloo residents based on cost sharing and other financial arrangements;**
 - **The Conservation Authority retain jurisdiction and responsibility for all flood control programs and investments in Laurel Creek.**

6.4 Community Trails and Cycling Routes

OVERVIEW

The City of Waterloo has some 150 kilometres of community trails and cycling routes. Community trails are located in parks and open spaces, providing links through and between parks, schools and significant roadways. In addition to the community trail system, there is an on-road bicycle system along collector and other major roads. The City's Transportation Master Plan is an

important linked strategy to the overall trail development program in Waterloo. These trails are highlighted as follows:

- **The West Side Waterloo Trails** - twelve kilometres located at the westerly end of Columbia Street and Forest Boulevard;
- **The Trans Canada Trail** - 5.7 kilometres following the Iron Horse Trail through Waterloo Park via the University of Waterloo to the Laurel Creek Conservation Area;
- **The Walter Bean Grand River Trail** - eleven kilometres along the Grand River; and
- **RIM Park Community Trails** - fifteen kilometres in the park.

Trends in leisure and recreation opportunities support increased investments in trails. Trails provide opportunities that are low cost, can be available at all times of the day and year if maintained year-round, provide opportunities for various skill levels and support diverse users in non-programmed activities.

Trails also support active transportation options between home, school, work and recreation destinations and healthier communities where children, families and individuals have opportunities to improve their fitness and physical well-being.

Through the Options and Alternatives workshop process, participants identified concerns related to trails as follows:

- Trails stopping at intersections with major roads that are unsafe and with no place to continue;
- Concerns that few of the trails connect with school, park or university destinations;
- Issues related to the need to travel on public streets resulting in safety conflicts with vehicular traffic;
- Challenges related to accessing the central and eastern portions of the City across the Conestoga Parkway;
- Concerns regarding, marketing, maintenance and the linking of the trail system to Kitchener to the south;
- Enhanced directional signage, such as the identification of cross streets.

Two further considerations for the community trails in Waterloo involve winter maintenance in order to facilitate year-round use, as well as to consider broadening access to trails traversing parks which is constrained by the current City policy closing parks from 11:00 p.m. to 6:00 a.m.

Recommendation: Community Trails and Cycling Routes

- **That the City of Waterloo undertake the following initiatives with respect to investments in and expansion of the Community Trail System:**
 - **Continue to expand the trail system through Plan of Subdivision approvals and community planning processes in green field developments within the City;**
 - **Integrate trails and access roads around stormwater management facilities into the Community Trails System;**
 - **Investigate opportunities to create a minimum of two safe dedicated Community Trail linkages across the Conestoga Parkway from central Waterloo to the east;**
 - **Expand the trail signage program, providing consistent directional supports, such as on street crossing names, to various connected venues across the City, at trail heads and other locations;**
 - **Create trail map kiosks at strategic locations to provide directions for trail users;**
 - **Improve trail use safety at busy intersections, and offer suitable alternatives where trails end at major roads;**
 - **Investigate the enhanced winter maintenance of trails to support year-round use and to facilitate trail use twenty-four hours per day where feasible and with community support.**
- **Sustain current annual capital investments in the development of the Community Trails System based on a Trails Master Plan and its regular updating focusing on the following priorities:**
 - **Trail extension into new areas;**

- **Overcoming trail linkage gaps and safety challenges;**
- **Replacing existing trails where appropriate and upgrading surfaces to facilitate accessibility and multiple uses.**
- **Preparing, updating and distributing Community Trail and Bicycle Route Maps, both electronically and via printed materials.**

6.5 Current and Future Site Master Plans

.1 MASTER PLANS INTEGRATION

OVERVIEW

Currently and in the future, the City will be engaged in the development of site-specific Master Plans for various parks, open space, trails and other initiatives. Some of these Master Plans will result from new opportunities, such as the McNally Lands, or will involve the renewal of aged sites or venues that need repositioning, such as Waterloo Park and Bechtel Park. Master Plans will also involve the development of the Community Trails System as both a recreational opportunity and as connected to a Master Transportation Plan for Waterloo. In the future, one could anticipate site-specific Master Plans evolving for RIM Park and a host of other sites, including St. Moritz Park and other new venues that emerge over time across the community.

Recommendation: Master Plans Integration

- **That the City ensure that all current and future site-specific Master Plans align and are consistent with the principles and strategic directions, policies and other relevant dimensions of the City's Recreation and Leisure Services Master Plan.**

.2 WATERLOO PARK

OVERVIEW

Waterloo Park is the historic jewel of the City's park system and offers something for nearly everyone. The site includes some sixty-four hectares of land, providing a mix of active, passive, natural and historic features across a range of activities and including more than fifteen individual facilities, sportsfields, trails and related spaces.

As intensification increases in the Uptown Waterloo area, there will be continued pressure for a variety of recreation and leisure activities in Waterloo Park. It is important to retain both passive and active recreational opportunities in the Park so that it retains its original multi-use functions. This ensures there are always activities in the park, improving participant safety and enjoyment. Active use of the park will provide greater assurance that investment and maintenance of this venue will be continued into the future and not limited to events.

It is recognized that the City of Waterloo is currently undertaking a review of Waterloo Park. As a result of this study, the following recommendation is provided.

Recommendation: Waterloo Park Master Plan

- **That the City of Waterloo retain Waterloo Park as a venue for a variety of passive and active recreational uses. That the existing balance between these two forms of use will need to be assessed with the Waterloo Park Master Plan to achieve an effective balance and to preserve the natural heritage and environmental character of the venue.**
- **That any dislocation of current uses in Waterloo Park be undertaken on an integrated basis with related recommendations in the Recreation and Leisure Services Master Plan, ensuring such resources are replaced where market trends and demand analysis within the Master Plan or based on future assessments support continuing need.**

.3 BECHTEL PARK

OVERVIEW

Bechtel Park lies in the eastern area of the City of Waterloo. It was originally planned to become cemetery lands associated with the City-owned and operated Parkview Cemetery. On a long-term basis, the lands were not needed for cemetery uses. As a result, the City pursued the opportunity over twenty years ago to develop the surplus lands into a significant community level park, involving an indoor soccer facility that has other multiple uses, such as badminton; a playground structure; sport and baseball fields, including a stadium setting.

In recent years, the Cemetery Division has identified a need to give consideration to the expansion of Parkview Cemetery as the current land resource is moving towards build-out. A master planning process was initiated for Cemetery Services / Bechtel Park that is currently underway. Several of

the planning alternatives call for a potential reduction in the number of baseball and sport fields to facilitate sectional expansions of the cemetery, particularly on the west side to accommodate cemetery needs to 2025. This could involve the conversion of seven to ten acres of parkland to cemetery use. This site also has some significant natural areas that support the Community Trail System and other uses.

Bechtel Park has evolved over the years as a highly developed community park, with stadium seating and other attributes. The stadium seating and other components are in significant need of repair and / or redevelopment. Therefore, the master planning process for Bechtel Park, and the longer term Recreation and Leisure Services Master Plan are directly intertwined in terms of establishing future directions for the development and delivery of these sportsfields and related facilities, especially in light of the need for some of the Bechtel Park lands to be utilized for cemetery growth over the next decades.

What becomes particularly important in the Cemetery Services / Bechtel Park Master Plan process, is the need to replace any lost sportsfields, and to determine where the best locations for the higher quality facilities with seating should be established. There is also some consideration being given to utilizing a synthetic surface for the soccer field as a basis to enhance the intensity of use, as well as being able to facilitate quicker use after rainstorms and related weather events.

Bechtel Park, since it is on the border with the City of Kitchener and has a long-term cemetery priority, may not be the best location for premiere sportsfield facilities. This is particularly an important consideration, in light of the concentration of quality sportsfield facilities at RIM Park which is in relatively close proximity to Bechtel Park, and the potential development of a multi-sportsfield venue on the west end of Waterloo, either as part of the current YMCA, Waterloo Library and City initiative, or as two separate venues. It is unlikely, that the City of Waterloo requires three major sportsfields venues. Therefore, on a long-term basis, Bechtel Park is probably best positioned to gravitate into a secondary sportsfield venue, with the premiere facilities established at RIM Park and a new west end venue. As the cemetery expands, the recreation role of Bechtel Park could diminish, and further major investments in Bechtel Park for sportsfields need to be clearly connected to the longevity of their availability in light of potential cemetery expansion requirements.

Recommendation: Cemetery Services / Bechtel Park Master Plan

- **That the City complete the Cemetery Services / Bechtel Park Master Plan, focusing on the following overall strategies:**
 - **Long-term gravitation towards two sportsfield complexes in the City, one at RIM Park and one in the west end of Waterloo;**
 - **The Cemetery Services / Bechtel Park Master Plan be based on the long-term transition of the facility from a premiere community park sportsfield complex to a secondary complex;**
 - **Any redevelopment of Bechtel Park ensure a minimum of ten to twenty years of use for any site developments over \$250,000;**
 - **Any sportsfields decommissioned as a result of the Bechtel Park Master Plan be re-established elsewhere as need is evident and space is available.**

.4 MCNALLY LANDS**OVERVIEW**

The City of Waterloo owns nearly 100 acres of environmental lands on its western boundary, known as the McNally Lands. Additional land acquisition has occurred in the area and future opportunities may also exist.

The future policy direction for these lands has evolved towards limited recreational facilities development, with the primary focus on environmental conservation and educational uses, potential artistic pursuits, trails for hiking and related activities. Council has given a direction for the lands in this regard.

The McNally Lands represent a significant resource for the City of Waterloo and are a major contribution to the open space resources of the community, contribute significantly to the urban form of the City and conserve environmentally sensitive and important heritage landscapes and features.

The lands have been acquired in recent years, and a future direction for the use and management of this resource is required.

Recommendation: McNally Lands

- **That the City undertake the development of a Conservation Master Plan and Management Strategy for the McNally Lands, focusing on the following:**
 - **The land primarily being conserved for environmental, ecological and passive leisure uses;**
 - **Exploring the potential development of artistic pursuits related to landscape painting, outdoor art courses and related uses;**
 - **Hosting of environmental, conservation and ecological educational programs and potential research activities;**
 - **Developing trails for walking and hiking, with connections to the broader Community Trail System;**
 - **Development of compatible ancillary supports for courses, research, information boards, storage, off-street parking and related needs.**
- **That as opportunities present themselves, the City consider acquiring directly or through donations, adjoining lands that would enhance the overall conservation and preservation of the McNally Lands and the environmentally important natural features of this area of Waterloo, integrating any such acquisitions into the Master Plan and Management Strategy for the site.**

.5 FUTURE SITE MASTER PLAN CONSIDERATIONS

OVERVIEW

On an ongoing basis, there are emerging park and open space uses that are important to consider in both existing and new park and open space planning initiatives. Current examples involve leash-free dog parks, garden plots, free form play areas and related activity opportunities. The City should undertake assessments in its master planning and site development initiatives to accommodate these uses where demand is evident, benefit can be realized and compatibility with both the physical characteristics of the venue and the other intended uses can be achieved.

Recommendation: Emerging Park and Open Space Uses

That the City give consideration within both its site master planning and park development initiatives to emerging uses for these venues where the physical resource can sustain them, need is apparent and compatibility with other activities can be achieved.

6.6 Parkland Classification and Criteria

OVERVIEW

The proposed parks and open space classifications and recommended criteria are discussed in detail below and are summarized in Tables 6.1, 6.2 and 6.3.

The City of Waterloo Official Plan, Section 3.7, as adopted in June 1990, includes policies with respect to the provision of Parks and Open Spaces. This section identifies community parks, city parks, regional parks, institutional open space and environmental open space.

Neighbourhood parks are the foundation of an open space system and satisfy the basic open space and recreational needs of the City's residents. They normally serve one or two neighbourhoods with a recommended service radius of 600 to 800 metres for built up areas or a walking distance of five to ten minutes. They accommodate both passive and active activities, and serve all age groups of the population. The recommended size of a neighbourhood park is between 0.5 hectares and 2.0 hectares. Their programming should be based on neighbourhood preferences, and at the minimum, provide areas for passive activities such as sitting, viewing, conversing and contemplating. In addition, there should be play areas for children for unstructured active play. Informal active recreation areas in the form of playing fields or play courts are optional. These optional facilities should reflect the needs and preferences of the local population. Where new immigrants are the predominant residents of the community, soccer pitches may be preferred over baseball diamonds. Neighbourhood parks also provide visual relief and provide aesthetic qualities especially to higher density areas, as well as serving as meeting areas for informal groups. The location should be central to the neighbourhood within a safe and convenient walking distance for most of the residents and uninterrupted by major thoroughfares. They can be augmented by connections to community trails, school yards and other open space settings.

The Official Plan for the City of Waterloo identifies **sub-neighbourhood parks** as part of the Open Space guidelines. They are generally 1.0 hectare or less in the area and have up to 0.2 hectares per 1000 population within an accessibility distance of 150 metres. For the purposes of the

Situational Analysis Report, these parks were combined with the neighbourhood parks for review purposes. When these small sub-neighbourhood sites are identified and reviewed, they tended to provide little or no opportunities for active or other recreational activities. They often perform an aesthetic entrance feature to residential areas. Experience in other municipalities has identified that these small parks can become pet walking areas for a limited number of surrounding residents. Where children or adults initiate active recreational pursuits, there are often complaints about noise from abutting property owners. Where existing sub-neighbourhood parks provide an important park function they should be retained. When redevelopment or intensification occurs, the City should encourage the expansion or replacement of these parks to achieve an area approaching the minimum **Neighbourhood Park** area of 0.5 ha. In greenfield areas, these minimum areas can be achieved through the normal development process. Through residential intensification and redevelopment, the City may have to accept a smaller area than 0.5 ha provided it fulfills the intended park function and locational criteria. New sub-neighbourhood parks are not recommended for acquisition by the City of Waterloo. These aesthetic amenities may be investments by land developers or grassed areas in the centre of round-abouts to be managed by abutting property owners. Acquisition and operational management of sub-neighbourhood parks does not necessarily advance recreation and leisure activities in the City and can be expensive to maintain.

Community parks serve three or more adjacent urban neighbourhoods and provide active and passive recreation activities. They have a recommended service area of 1.6 to 2 kilometres and may be accessed by walking, cycling, vehicle or public transit. These parks are multi-purposed and offer both passive and active recreational areas for both programmed and non-programmed use. Where possible they should offer year-round recreational opportunities. They may include major sports fields, community and specialized facilities, outdoor swimming pools and splash pads.

The size of community parks will vary according to the nature of the proposed facilities, but should be a minimum of four hectares. They may also serve as local parks for their immediate neighbourhoods. Good linkages in the form of walkways and community trails are important to connect community parks with other destinations in the City of Waterloo.

City parks are those important outdoor recreation facilities that offer unique special purpose activities. They take advantage of a variety of important resources, historically significant structures and areas of unique character or significant recreation facilities. For the City of Waterloo, these are identified as Waterloo Park, Bechtel Park, Hillside Park as a baseball venue, Waterloo Memorial Recreation Complex, RIM Park and Laurel Creek Conservation Area. These parks serve a large cross section of the City's population and may attract visitors from outside of the City, thus acting as regional parks. The size of these parks will vary depending on the land resource, facility requirements and should be evaluated on an individual basis.

The proposed park hierarchy includes generic facilities, provision standards for each relevant class of park, along with minimum recommended park sizes to ensure that the required space is available to accommodate current and future park and facility needs.

Recommendation – Parkland Classification and Criteria

That the City of Waterloo adopt the outlined parkland classification for Neighbourhood, Community and City-Wide parks and the criteria as outlined in Tables 6-1, 6-2 and 6-3.

**Table 6-1
Recommended Criteria – Neighbourhood / Local Parks**

Neighbourhood / Local Parks							
Basic Facility Requirements	Optional Facilities	Access	Service Area	Preferred Size	Service Standards	Identity and Location	Notes
<ul style="list-style-type: none"> ▪ Playground ▪ Informal seating area ▪ Open turf area for play ▪ Provide shaded areas (with planting or shade structure) for passive recreation ▪ Park name and signage ▪ Waste receptacles 	<ul style="list-style-type: none"> ▪ Play courts ▪ Play fields ▪ Toboggan hills ▪ Horseshoe pits, etc. ▪ Trail Connections 	<ul style="list-style-type: none"> ▪ Walking ▪ Cycling ▪ Trails 	600 to 800m radius or 15 to 20 minutes of walking, uninterrupted by major roads and other physical barriers.	0.5 to 2 hectares	<p>1ha/1,000 population</p> <p>A balance of active and passive park spaces</p> <p>Minimum two access locations</p> <p>Preferred street frontage 50 metres, but not less than 40 metres</p>	<p>Defined edges to distinguish from adjacent land use and provide extensive street frontage for safety and visibility.</p> <p>Location to be central to the neighbourhood / local area it serves, in a way that the service area is not interrupted by major roads and other physical barriers.</p> <p>Screen park from negative adjacent impacts.</p>	<p>Serves one or two neighbourhoods / local areas.</p> <p>Location and facilities should be coordinated with elementary schools where the possibility exists.</p>

**Table 6-2
Recommended Criteria – Community Parks**

Community Parks							
Basic Facility Requirements	Optional Facilities	Access	Service Area	Preferred Size	Service Standards	Identity and Location	Notes
<ul style="list-style-type: none"> ▪ Fulfill requirements as a Neighbourhood Park ▪ Major playgrounds ▪ At least two competitive level play fields and one play court (basketball, ball hockey, tennis or multi-purpose) ▪ Seating area for viewing as appropriate ▪ Provision of shade with plating or shade structure ▪ Parking and parking lot lighting ▪ Provision of bike racks ▪ Park name signage ▪ Waste receptacles 	<ul style="list-style-type: none"> ▪ Additional play fields or play courts ▪ Splash pads ▪ Toboggan hills ▪ Natural areas, horticultural displays ▪ Informal activity areas, eg: horseshoe pits, etc. ▪ Informal seating areas ▪ Open turf areas for play ▪ Concession, change and storage facility / facilities ▪ Washrooms ▪ Play area, play court and play field lighting ▪ Walkway lighting ▪ Informational signage ▪ Trails / Trail Connections 	<ul style="list-style-type: none"> ▪ Walking ▪ Cycling ▪ Trails ▪ Driving ▪ Public Transit 	1.6 to 2.6 km radius in built-up areas	Minimum 4 hectares	<p>1ha/1,000 population</p> <p>Primarily active park spaces with the provision of passive spaces to fulfill the requirements of a neighbourhood / local park where applicable.</p> <p>More than two access locations</p> <p>Minimum street frontage 50 metres</p>	<p>Defined edges to distinguish from adjacent land use and provide extensive street frontage for safety and visibility.</p> <p>Location to be central to the community it serves and be accessible from a major local road.</p> <p>Screen park from negative adjacent impacts.</p> <p>Screen neighbouring residences from negative park impacts (play court lighting etc.) where applicable.</p>	<p>Serves identified communities.</p> <p>Location and facilities should be coordinated with elementary or secondary schools where the possibility exists.</p> <p>May attract visitors from other areas of the City and outside the City.</p>

**Table 6-3
Recommended Criteria – City Parks**

City Parks							
Basic Facility Requirements	Optional Facilities	Access	Service Area	Preferred Size	Service Standards	Identity and Location	Notes
<ul style="list-style-type: none"> ▪ Basic facility requirements to be determined on an individual use basis ▪ Park signage ▪ Waste receptacles 	<ul style="list-style-type: none"> ▪ Parking lot lighting as required ▪ Washrooms as required ▪ Display info or guide to park facilities where applicable ▪ Visitor support amenities, ▪ Trail connections and trail lengths ▪ Major recreation facility structures and / or support facilities ▪ Seating / stadium seating ▪ Community Gardens 	<ul style="list-style-type: none"> ▪ Walking ▪ Cycling ▪ Trails ▪ Driving ▪ transit <p>Public</p>	Serves the entire City and beyond	Size varies depending on land features and base, facilities and venue purpose	<p>3ha/1,000 population</p> <p>More than three access locations</p> <p>Prominent street frontage greater than 50 metres</p>	<p>Defined edges to distinguish from adjacent land use</p> <p>Location dependent on availability of areas with features these parks are secured on</p>	<p>Includes:</p> <ul style="list-style-type: none"> ▪ Recreational buildings ▪ Trails ▪ Cultural, Civic and Historic Parks, Memorials, Monuments ▪ Public Gardens, Arboreta ▪ Cemeteries ▪ Conservation Areas, Wildlife Sanctuaries, Natural Areas ▪ River corridors ▪ Ecologically significant lands <p>Potentially attracts visitors from outside the City</p>

6.7 Parkland Provisioning Standards

OVERVIEW

The requirements for park standards have evolved through several iterations in the twentieth century to adjust with changing recreational trends, community values and demographics. The standard convention of 4.0 hectares for 1000 community population, along with the classification of neighbourhood, community and regional parks was well developed by the end of the 1970s. Typically the larger park categories would encompass features beyond municipal parkland, including campgrounds, conservation areas, large natural areas, and provincial and national parks.

The use of park hectares per 1000 population standard provides a simplified analysis for parkland provision. The Recreation and Leisure Services Master Plan proposes provisioning standards in the park hierarchy. At the same time, caution should be exercised in using such standards as the absolute and exclusive criteria. They must be considered as a guideline, and can be used as one of several instruments in determining parkland improvements and development needs. This strategy is also reflective of the increasing intensification and redevelopment of brown field sites in the core area of the City of Waterloo.

Provisioning standards do have their role in establishing policy and providing direction for priorities in park improvement and development, provided it is recognize the standards serve as a foundation for establishing general parkland amounts, subject to the changing needs and direction of the community. The provisioning standards proposed for the City of Waterloo are as follows:

- Neighbourhood Parks 1.0 hectare per 1000 population;
- Community Parks 1.0 hectare per 1000 population;
- City-Wide Parks 3.0 hectares per 1000 population;
- Total City Parkland 5.0 hectares per 1000 population.

The City is currently providing approximately 9.6 hectares of municipal park space per 1000 population, which is almost double the recommended provisioning level for parkland. Just under one-half that amount, 4.4 hectares is provided in the form of open space lands, which are considered natural areas and not necessarily suitable or preferred for active recreational uses. Therefore, 5.2 hectares of parkland exists per 1000 population. Though this rate exceeds the recommended provisioning level, it should be maintained into the future for the City of Waterloo due to the significant value and importance residents place on the City's parks.

The Situational Analysis Report recognizes differences in the provisioning of parks across the City as a result of historical development. The provisioning standards will be compared with the existing availability of parks, recognizing that City-wide parks in the core may also serve the multiple functions of neighbourhood or community parks.

The existing Official Plan policies allow for a higher standard of parkland dedication of 1.0 hectares per 300 dwelling units. This rate should be used when the density of development permits fifteen units per hectare or greater to achieve a higher parkland dedication. Alternatively, in the core area, parkland can be expanded or replaced with the acquisition of lands including surplus school sites, brownfield redevelopment, green roofs and similar areas or potential agreements that could be entered into with larger open space areas associated with churches, the university and other land owners.

Recommendation – Parkland Provisioning Standards

- **That the City of Waterloo adopt the following parkland provisioning standards:**
 - **Neighbourhood Parks at 1.0 hectares per 1000 population;**
 - **Community Parks at 1.0 hectare per 1000 population;**
 - **City-wide Parks at 3.0 hectares per 1000 population;**
- **That the City of Waterloo continue to acquire parks, open space, trail and related lands through the land use planning approval process, through the subdivision process at appropriate locations, via direct acquisition in deficiently served areas and through donations / endowments in order to achieve the recommended provisioning standards and to protect key natural heritage and environmental resources.**

6.8 Parkland Dedication Policies

OVERVIEW

Parkland dedication is one of the means by which the City acquires lands in support of its parks, open space, trails and related facilities development. Parkland dedication is a function of the Ontario Planning Act which permits the City to receive up to 5% of a residential land development's

land for public park purposes or an equivalent value in funds. Through considerable negotiations, Ontario Municipal Board hearings and many years of experience, municipalities and developers have discussed the kind of land that should be dedicated, including ravine lands, slopes and other non-developable lands for parkland purposes. It is recognized that many of these lands are non-developable which also means they may not be suitable for desired park functions, including sports fields, playgrounds, ancillary buildings and trails. These lands often have safety or natural hazard conditions which make them unsuitable for anything but passive trail use or as environmental lands.

The City of Waterloo has benefited from the acquisition of significant amounts of naturalized area and open spaces along the western boundary of the City known as the McNally Lands. These lands were acquired outside of the normal dedication process.

A parkland dedication strategy is required to give direction to the negotiations for dedicated parklands. It is also important in view of the fact that provincial and environment planning and other initiatives are resulting in increased amounts of land being deemed non-developable and that municipalities are under increasing pressure to absorb more of these lands as part of dedication requirements. This pressure could jeopardize the ability to secure table land for park based activities and could result in parks that are not in preferred locations, creating potential challenges related to access, utility, maintenance and operations.

These undeveloped lands often provide amenity spaces for surrounding property owners. At the same time, developers normally do not want to retain these lands for liability purposes and the responsibility associated with maintaining their environmental and aesthetic character and features. It is recommended that the City of Waterloo identify a acquisition budget related to natural heritage and environmental areas, and that this resource be separated from parkland acquisition or dedication funds related to acquiring active parkland space.

Since 1999, the City has established and funded the Environmental Lands Acquisition and Maintenance Strategy to support open space lands initiatives. This has been a proactive approach to funding the acquisition and maintenance of selected open space lands.

The City may wish to explore alternative management and funding supports related to these natural areas building on the current acquisition program. This may lead to an initiative to form a land trust strategy similar to the Nature Conservancy of Canada and other organizations who work in partnership with community organizations, granting bodies, and Conservation Authorities and others. In partnership with the City and the Grand River Conservation Authority, community organizations may also be able to develop technical capacities to engage and partner in initiatives with respect to the management and preservation of these lands.

Recommendation: Parkland Dedication and Land Trust

- **That the City of Waterloo accepts parkland dedications that:**
 - **Meet the park and open space hierarchy and provisioning standards of the Official Plan and the Recreation and Leisure Services Master Plan;**
 - **Effectively support the development of park-based facilities and amenities in accordance with the parks hierarchy and development guidelines;**
 - **Are not designated environmentally sensitive, such as significant woodlots, ravine lands, stormwater management ponds, lands subject to flood hazards and erosion and related lands.**
- **That Parkland Dedications Funds, taken in lieu of land, be used when the required land dedication does not provide an area of suitable size, shape or location for the development of public parkland. The review processes for such discussions should involve the Environment and Park Services, Development Services and Recreation and Leisure Services Departments.**
- **That the City of Waterloo explore with community members, environmental groups and the Grand River Conservation Authority, the potential to establish a land trust as a possible organizational vehicle to acquire, fund, manage and sustain non-developable environment lands that may come into or be best positioned in the long term public ownership and where the primary intent is the preservation and conservation of these resources and not leisure programs or active use.**

Recommendation: Official Plan Parkland Policies

- **That the City consider the following recommended standards for incorporation into its five year review of the Official Plan:**
 - **The City shall require the conveyance of lands suitable for park and other public recreation purposes as a condition of draft plan of subdivision approvals pursuant to the Ontario Planning Act;**
 - **All conveyances shall be made in accordance with the criteria and standards set out in the Recreation and Leisure Services Master Plan at the following rates:**
 - **The conveyance for residential and other purposes shall be at the rate of 5% of the land or 1.0 hectare of land for each 300 dwelling units, whichever is greater;**
 - **A conveyance of land for commercial and industrial purposes shall be 2% of the land to be developed.**
- **That the City may, in lieu of land dedication, require the payment of funds by the landowner equal to the value of land conveyance otherwise required where it meets the following criteria:**
 - **The required land dedication does not provide an area of suitable shape, size and / or location for the development of public parkland. The review process for site selection alternatives should involve Environmental and Park Services, Development Services and Recreation and Leisure Services;**
 - **The guidelines established in the Recreation and Leisure Services Master Plan determine that the existing park and recreation facilities in the development area are adequate to serve the projected increase in population;**
 - **The City will not consider portions of natural areas or lands subject to other hazards for parkland dedication purposes.**

7.0 ARTS, CULTURE AND HERITAGE

7.1 Introduction

Based upon the research and a broad-based consultation program for the Situational Analysis Report, the City of Waterloo's arts, culture and heritage services were widely seen as an evolving area that needs a clear and sustainable strategic definition, direction and development strategy. Despite an increasing focus and value for arts, culture and heritage, how this service area moves forward within Waterloo is relatively undefined.

At present, the City recognizes the importance of arts, heritage and culture by making it a service area responsible for cultural development, festivals and heritage resources within the Recreation and Leisure Services Department, and through initiatives such as the establishment of the Arts and Culture Advisory Committee and the Municipal Heritage Committee.

As is the case with sports and recreation services, community-based, volunteer-governed organizations are the primary cultural service providers in the City of Waterloo. The role of volunteers is extensive and a key cornerstone in the delivery of these services and could not be replaced or duplicated by government or institutional providers.

In the sixteen years since the completion of the City of Waterloo's first Cultural Master Plan, arts, heritage and cultural resources have been accepted as essential economic drivers of vibrant, healthy communities. The "Creative City" movement posits that cultural creativity and the new knowledge-based economy have replaced natural resources and geographic advantages as drivers for urban economic growth. The success with which an urban region can generate, attract and retain creative industries and a talented workforce of highly educated people depends largely on its quality of place and community characteristics that promote strong social cohesion in the form of vibrant neighbourhoods, a rich and stimulating cultural scene, ethnic diversity, an appealing built environment, rich employment opportunities, and access to social services.

The key strategies and recommendations that comprise the arts, culture and heritage component of the Master Plan are informed by two main sets of factors.

The first set represents the key findings of the research and consultation activities of the Situational Analysis Report within the Master Plan process. These findings, which are specific to the Waterloo cultural community and the city's urban form and development, resulted in the following strategic themes:

- Waterloo has a rich history and tradition that provides a strong basis for arts, culture and heritage initiatives focused on its Mennonite heritage, a tradition of music and sport, and the resources of the universities and their influence upon the City's urban form, cultural development and economic growth.
- The arts, culture and heritage service area is seen as significantly undervalued and underdeveloped in comparison to sports, recreation, parks and leisure services.
- Resourcing and support for this service area is limited in terms of City funding and staffing, and overall community investment. A strong sense exists that there is limited strategic direction or organization of this sector at all its levels.
- There is an emerging perspective that this service area needs to significantly grow and evolve as arts, culture and heritage become an increasing part of developing a more economically prosperous and appealing community.
- The increasing multicultural diversity of the community and other demographic changes are seen as opportunities for supporting an increased focus on and availability of arts, culture and heritage services.

The second set applies to the evolving field of cultural planning in which heritage and culture are understood to be drivers for municipal economies. Although a focus on culture is now recognized at both the federal and provincial levels as being essential to prosperous, livable and sustainable communities, at present useful provision standards or per capita benchmarks for arts and heritage facilities do not exist as they do for parks, recreation and library facilities.

7.2 Policies, Role and Organizational Design

OVERVIEW

Sections 2.0, 3.0 and 4.0 of the Recreation and Leisure Services Master Plan identify priorities in regards to policies, a repositioning strategy for the City of Waterloo in regards to its roles and responsibilities in the delivery of recreation and leisure services, as well as the undertaking of a comprehensive organizational design review of the Recreation and Leisure Services Department. These initiatives, from both service delivery and organizational perspectives, will influence and connect directly with the future development and delivery of arts, culture and heritage services in Waterloo. This involves the Leisure Services Delivery Policy and other policy initiatives, as well as

the positioning and organizational design recommendations. As a result, the recommendations on arts, culture and heritage in the Master Plan need to be read in conjunction with all the recommendations in Sections 2.0 to 4.0.

Recommendation: Master Plan Alignment

- **That the arts, culture and heritage services area of the Recreation and Leisure Services Master Plan be aligned with the principles, policies and organizational strategies and priorities of the Master Plan.**

7.3 Culture Plan Development

.1 PLAN DEVELOPMENT

OVERVIEW

Waterloo's demographic, industrial and cultural profile describes a diverse, high-tech community poised on the cusp of transformation as a creative city. This transformation, which is critical to the future development of the city, requires a more in depth assessment of its cultural resources and capacity than this discussion, presented as a chapter within the Recreation and Leisure Services Master Plan, is able to provide. The need for a dedicated Cultural Plan is underscored by a number of issues and challenges related to this area.

- Consultation findings indicate a lack of understanding and inconsistent use of the terminology "arts/heritage/culture" by both residents and City staff. In addition to this, questions were raised, primarily by Recreation and Leisure Services staff, as to whether differences exist between cultural as compared to recreation or leisure programs / services, that offered traditional arts-type programs, such as dance. It is clear from these questions and the confusion that exists around them that a community-wide discussion regarding the nature and scope of Waterloo's cultural profile and resources is required. One of the benefits of developing a focused cultural plan is its capacity to reframe traditional mindsets of what "culture" is, such as seeing cultural development through the lens of individual disciplines (visual arts, heritage, performing arts), and viewing culture only in "aesthetic" terms related to specific forms of artistic expression.

- Questions and concerns were raised regarding the scope and outcomes of the Recreation and Leisure Services Master Plan in the areas of arts, culture and heritage. It was felt by some that the limited scope of this plan of which culture is one component, would not result in significant positive change in this area.
- A cultural mapping project is a critical component of a cultural plan. The Arts, Culture and Heritage Inventory and Mapping Project, an initiative of the Recreation and Leisure Services Department drafted in 2007, has inventoried a large portion of Waterloo's cultural resources as a valuable starting point. However, sources representing a broader definition of culture, e.g. churches, neighbourhood organizations, and intangible resources such as stories and perceptions of a place, have not been included. In addition, plans to update and maintain this inventory as an ongoing, community-based project have not been put into place.
- Waterloo's close relationship with the Region of Waterloo and the other two lower-tier cities, Cambridge and Kitchener, adds a level of complexity to the discussion regarding community identity, service delivery and program funding. As both the Region and the City of Kitchener have completed Cultural Plans, and the City of Cambridge is presently in the process of doing so, the development of a Cultural Plan for the City of Waterloo would facilitate discussions and decisions on these issues.
- The development of a Waterloo Cultural Plan will elevate and further integrate culture as a critical ingredient in the development of a unique, creative Waterloo. Cultural planning, is a "whole systems" approach, involving new ways of thinking about cultural development and capacity building at the municipal level. It encourages a shift to view all municipal decision-making through a "cultural lens." In this way, it goes beyond being simply a "suite of services" generated by one city department.

Recommendation: Culture Plan Development

- **That the City initiate the creation of a new Cultural Plan for the City of Waterloo including:**
 - **Assessment and updating of the Waterloo Arts, Culture and Heritage Inventory and Mapping Project;**
 - **Development of a long-term strategy to maintain, promote, and utilize the inventory;**
 - **Facilitate community-based discussions on what constitutes culture and cultural resources in Waterloo;**
 - **Identification of the human and financial resources necessary to implement the plan;**
 - **Development of a cultural policy document as a strategic resource that defines the meaning, role and integration of arts, culture and heritage for the City of Waterloo;**
 - **Development and implementation of strategies to ensure proven and tested “best practices” in municipal cultural planning including:**
 - **Integration of decision-making;**
 - **Accountability and asset management;**
 - **Citizen engagement;**
 - **Tourism and economic development linkages.**

.2 CULTURAL SERVICES POLICY

OVERVIEW

Policy development is a critical first step in the affirmation of cultural resources and services as essential community components. The policy framework outlines the definition of culture and cultural services unique to the City of Waterloo upon which a foundation of shared values will be based, and the role of municipal government in the planning, development, delivery and the evaluation of cultural services, and areas of intersection between the City, residents, and external groups and municipalities will be articulated and integrated. Once completed and approved, a comprehensive Community Cultural Services Policy will assume the role of a guiding master document for the City's cultural planning initiatives and procedures.

Recommendation: Community Cultural Services Policy

That a Community Cultural Services Policy be established and include the following content components:

- **Policy rationale and need;**
- **Policy principles / foundation;**
- **Policy statement and content;**
- **Linkages to regulatory and / or statutory acts or legislation, regulations and / or City policies;**
- **Implementation and monitoring procedures;**
- **Mandatory policy review date;**
- **Amendment tracking component.**

.3 COMMUNITY CULTURAL COUNCIL AND FORUMS

OVERVIEW

The Situational Analysis Report findings for the Master Plan indicated the presence of a significant community capacity base composed of informed, highly educated and dedicated residents. Community capacity can be defined as the combined influence of a community's commitment, resources and skills that can be deployed to build on community strengths and address community problems and opportunities.

Waterloo's potential community capacity is evident from the following indicators:

- Community-based, volunteer-governed organizations are the primary leisure service providers in the city. Many of these also make extensive use of committed volunteers in the direct delivery of programs and services.
- The importance of culture as a significant economic driver is accepted as a fundamental tenet of municipal planning by business and community groups, both in the City of Waterloo, and in communities throughout the Region of Waterloo.
- Recent major cultural events and programs, such as the community festivals program, the 150th Anniversary celebration and the Veterans' Green project, which were developed and implemented with substantial volunteer support, are recognized as a source of pride and community identity for Waterloo residents.
- The City has several well-established, volunteer-based cultural organizations in place, which contribute substantially to the city's cultural identity. These include two advisory committees for Council: the Waterloo Municipal Heritage Committee (established in 1976) and the Advisory Committee on Culture.
- The Waterloo Arts, Culture and Heritage Inventory and Mapping Project, a project of the Recreation and Leisure Services Department indicates the presence of a significant cultural capacity. It lists over fifty organizations / groups with an arts, culture and heritage mandate, and over 135 businesses producing or directly providing arts, culture and heritage products.

- Numerous examples exist of institutions and individuals that are organizing and offering an active program of high quality cultural events on a regular basis. Notable examples include the Perimeter Institute of Theoretical Physics, the Waterloo Community Arts Centre, the Canadian Institute for Governance Innovation, and the city's universities. However, for the most part, these organizations work independently of each other and promotion about these events is limited due to a lack of a promotional network.

Recognized outcomes for strengthened community capacity include an expanded leadership base for informed decision-making and expanded, diverse inclusive citizen participation. The latter point is especially important given the concerns around a shrinking volunteer base as identified during consultations.

Significant issues that emerged on Waterloo's cultural capacity during the public consultations included:

- A strategy to unify the fragmented nature of the cultural community, often linked to a perceived inability to work towards a common goal to effect positive change;
- Assistance for local groups regarding grant applications and funding opportunities;
- Increased funding for cultural programs;
- Need for heightened promotion and profiling of cultural events and resources;
- Opportunities for networking to share expertise and resources;
- The need for space for meeting and storage;
- Opportunities to enhance urban design through wall murals, public art and other "street" initiatives.

The establishment of a professionally-operated coordinating and planning body or council, as an arms-length agency to oversee the development and implementation of a cultural agenda, is a strategy that has been successfully used in some other municipalities. In the sports sector, Community Sport Councils have been successfully used as mechanisms for mobilizing local resources and capacities in recreation and sports in Canada and around the world for many years.

The creation of a Waterloo Cultural Council, as opposed to an “arts” / “heritage” council, could enable a broad “whole systems” approach in which representatives from individual disciplines, sectors and groups would work together to achieve mutually-agreed upon goals. In addition to breaking down barriers and busting “silos” between disciplines and interests, the establishment of the Waterloo Cultural Council would achieve the following positive outcomes:

- An elevated focus on Waterloo’s cultural resources and initiatives through the establishment of a recognized professional, multi-sectoral organization;
- Expanded opportunities for citizen participation through the establishment of a multi-sectoral Board of Governance and membership base;
- The coordination of fundraising activities for the cultural sector;
- An opportunity to provide funding through cultural investment programs, such as foundations, for cultural groups and initiatives through an informed peer-review process;
- The ability to seek funding from sources that municipalities cannot access, such as the Ontario Trillium Foundation;
- Encouragement of donations and sponsorships for cultural initiatives through the establishment of an investment program or foundation;
- A focal point for training, information and assistance for cultural groups and individuals;
- An opportunity to provide a cultural community information portal for news and resources;
- Representation for Waterloo’s cultural community on the local, regional, provincial and national levels;
- Opportunities for networking to share expertise and resources on local and regional levels with established organizations such as the Waterloo Arts Council;
- Professional and community-based assistance and support for City staff on cultural planning strategies, events and programs.

One of the most memorable public consultations for the Recreation and Leisure Services Master Plan occurred at Albert McCormick Recreation Centre in April 2008. At this session, members of the Waterloo Youth Council, local skateboarding groups, and residents of all ages (from seniors to babies in strollers) from neighbourhoods across the city arrived in large numbers to take part in the consultation. Three lively group discussions ensued, indicating a passionate interest by the Waterloo community in recreation and culture.

The grass-roots energy shown during this session indicates a strong sense of place and belonging on the part of the Waterloo community. Building upon the momentum of this session would elevate the level of community involvement and civic pride, furthering strengthen Waterloo's community cultural capacity.

Recommendation: Community Cultural Council and Forums

- **That the City facilitate the possible feasibility assessment of a Waterloo Community Cultural Council as a professionally run, arms-length, charitable agency to oversee the development and implementation of the community's and the City's cultural agenda as part of the Cultural Services Master Plan. The following factors would be important to ensure its success:**
 - **Board and general membership should be multi-sectoral and should ensure representation from the universities, businesses, research institutes, ethnic groups, youth, neighbourhood groups, the arts community, sports groups, the Waterloo Public Library, heritage interests, tourism groups, a member of Council, and City staff representing Recreation and Leisure Services (representing both culture and sports areas), Parks, Economic Development, and Planning.**
 - **Council membership should commit to active participation in working groups formed to assist in the development of specific areas, such as festivals, public art, heritage, promotions and marketing, etc.**
 - **The Council should be provided with sufficient base line funding to ensure the hiring and retention of competent, professional staff;**

- **The Council should be headquartered in appropriate facilities, e.g., Waterloo Community Arts Centre, to ensure maximum community visibility and networking;**
- **The Council should be engaged in cultural investment funding via the proposed Community Partnership and Investment Fund recommended in Section 4.3.2 of the Master Plan.**
- **The Council should work with the City to establish a cultural awards program as a powerful lever of change to groups for activities, organizations and individuals who have contributed significantly to furthering the city's cultural capacity.**
- **That the City establish a schedule of regular theme-based cultural community forums in an accessible location for City residents.**
- **That in order to attract as many participants as possible, particularly youth, promotional information should be sent by internet as well as by printed material posted as widely as possible. The forums can be organized as mini-festivals, offering music, refreshments and rewards such as prizes to instil an all-ages atmosphere of fun and participation. Facilitators can include Waterloo Cultural Council Board members, City councillors, City staff and volunteers.**

7.4 Cultural Collections

OVERVIEW

The City owns four major cultural collections managed by cultural section staff. These include the Heritage Collection, the Industrial Artifact Collection, the Fine Art Collection, and the Large-Scale Art Collection. Pieces comprising the Fine Art and Large Scale Arts Collection are installed in public and office facilities around the city. In 1996, Council approved a "Percent for Art Policy" that allocates up to one percent of the budget for civic building construction or renovation projects over one million dollars towards the purchase or commission of art to be displayed in public areas, or as part of the building structure. The policy is designed to introduce neighbourhood landmarks/placemakers into the public urban environment, to stimulate the growth of arts and art-related businesses within the city, to increase public awareness and appreciation of the arts, and to

lend scale and interest to large developments. Major issues related to these collections include collections management policies that have not passed draft form, and lack of storage and display space for the heritage collection.

Consultation for the Master Plan revealed a lack of access to the City's Heritage Collection. Heritage Resources staff and the City Heritage Collection are presently housed in temporary quarters at the Canadian Clay and Glass Gallery. Space is at a premium both for the City's collection and the Gallery's needs. Some of the City's collection is stored in other locations provided by the Region of Waterloo.

Despite the development of a new regional history museum in Kitchener, city residents value the City's collection for its distinctive Waterloo industrial heritage profile related to the Seagram family business. Many continue to mourn the loss of the former Seagram Museum (now the Canadian Institute for Governance Innovation) as a cultural anchor in the downtown core. As well, the City lacks a retention method and dedicated archival space for the conservation and management of historically significant documents generated by the City and other sources.

Staff have recently been assessing various facilities as potential homes for the Heritage Collection. These include space in the Conestoga Mall in the city's north end, and the historic Carnegie Library building in the uptown core. This latter location has been suggested by heritage interests as a suitable home for Heritage Resources in Waterloo. The Mall provides access to potentially large on-site audiences.

Consultation with Recreation and Leisure Services staff indicated they feel as if they are sometimes working in isolated "silos" with few opportunities for communication and cooperation with departmental colleagues though some integrated team approaches are in place at the discretion of managers. Greater use of functional service teams organized around issues related to programs and facilities, e.g. space allocation, fees, program development, marketing and promotions, and composed of staff from divisions across the Recreation and Leisure Services department would increase opportunities for communication and collaboration and create a more efficient and productive working environment. This approach would also promote discussions and enhanced understanding of the relationship between culture, recreation and leisure services.

Recommendation: Cultural Collections and Interdepartmental Teams

- **That the Department review and ratify collection management policies for the City's four cultural collections: the Heritage, Industrial Artifact, Fine Art, and Large Scale Art.**
- **That the Department investigate the establishment of an archives program to ensure the retention and management of historically significant documents for the City of Waterloo.**
- **That the Department undertake a feasibility study to determine a suitable location for the storage, management, exhibition and interpretation of the City's Heritage Collection.**
- **That the Department promote the increased use of functional intradepartmental service / program teams composed of staff from across the Recreation and Leisure Services department to increase communication and collaboration, and coordinate program development and facility usage.**

7.5 Funding Support

OVERVIEW

Issues identified around financial equity and investment in arts, culture and heritage services derived from the consultation program tended to focus on two areas:

- Perceived inequality between funding for cultural facilities and groups as compared to sports and recreation;
- Lack of affordable access to meeting rooms and programs by many local cultural groups and societies.

It is important to revisit and reassess current funding formulae, subsidy and investment procedures for recreation and leisure services, programs and facilities. In setting appropriate grants and subsidies, staff should consider annual municipal per capita investments in other comparable "creative cities." In addition, economic indicators such as jobs created in the cultural sector and tourism opportunities should be considered as well.

Recommendation: Funding Support

That the Department develop an arts, culture and heritage services investment strategy in conjunction with the recommendations in Section 4.2.3 of the Master Plan related to the formulation of an integrated Community Partnership and Development Fund.

7.6 Affordable Access

OVERVIEW

Affordable access to facilities and program participation should be reassessed by the Recreation and Leisure Services Department for cultural programs and groups. It is likely that more information is required to determine needs and to set payment and subsidy levels. Affordable access to cultural opportunities for youth should be considered a first priority.

Recommendation: Affordable Access

That Department staff reassess fees to access City facilities and programs for arts, cultural, heritage and related groups as a component of the User Fee Policy recommendation in Section 4.1.1 of the Master Plan.

7.7 Long-Term Endowment Community Culture Investment Fund

OVERVIEW

Municipalities and / or cultural organizations often establish foundations or endowments to provide a long-term, stable funding base for arts, culture and heritage programs. The Region of Waterloo funds two such programs:

- Waterloo Regional Heritage Foundation assists in the preservation of the Region's heritage, culture, historic buildings and objects of historical significance. There are two types of grants available, Projects/Events Grants, and Publication Grants. Any individual or group in the Region of Waterloo may apply for funding from the Projects/Events Grants, and Publication Grants programs.

- The Region of Waterloo Arts Fund, a not-for-profit corporation created in 2002 to provide arm's length funding for the performing, visual and literary arts in the Region of Waterloo.

In addition to these two existing regional programs, the City of Waterloo, in collaboration with the proposed Waterloo Cultural Council, should consider investigating the establishment of a Cultural Investment Fund. This could take the form of a community-based project, such as a Waterloo Cultural Foundation, or a wider regional initiative, such as the establishment of an Arts and Heritage Stabilization Program in collaboration with the Region of Waterloo and the Cities of Cambridge and Kitchener as a funding anchor for city and regional groups. Partially funded by the Department of Canadian Heritage, the capacity-building component could support independent, non-profit organizations operated by a board of directors, whose mandate is to support professional arts organizations and/or heritage organizations within a city or region with their projects to adopt sound practices in governance, strategic planning and organizational effectiveness. At present, seven projects exist across Canada. The two closest to Waterloo are the Creative Trust in Toronto, and the Bay Area Arts & Heritage Stabilization Program.

The Fund would be established based on senior government grants, corporate sponsorships, bequests and other sources placed within an endowment framework that preserves the capital and allocates the annual earned income.

Recommendation: Long-Term Endowment Fund

That the City investigate the establishment of a long-term, stable funding program, such as a community-based foundation or endowment program, or on the regional level, an Arts and Heritage Stabilization Program, potentially as a collaborative initiative with the Region of Waterloo and the Cities of Cambridge and Kitchener.

7.8 Waterloo Community Arts Centre

OVERVIEW

The results of the Situational Analysis Report indicated the following priorities and issues related to facility use and development for arts, culture and heritage:

- Accessibility, improvements and upkeep of the Waterloo Community Arts Centre;

- Lack of suitable exterior and interior performance and storage space for performing arts groups;
- The need for storage and program space for cultural groups and programs.

A key constraint that emerged from the Situational Analysis Report indicated that the City's capital funding capacity for recreation and leisure services is significantly limited for at least ten to fifteen years and beyond. Therefore, any City involvement in new facility initiatives will be limited to those projects currently budgeted for in the ten year forecast, i.e. West Side Recreation Complex and ongoing trails development. Based on this analysis, it is unlikely that the City will be able to undertake major facility development over the next ten year period, a factor that must be considered in recommendations concerning cultural facilities.

The Waterloo Community Arts Centre, founded in 1993, is located in the 1886 Roschman Button Factory, one of the city's designated heritage buildings in the Uptown core across from City Hall. A not-for-profit organization, it operates with seven part time staff and seventy to seventy-five volunteers. Over thirty community groups take advantage of arts program, classes, workshops, performances and the art gallery at the Centre. Users vary from 24,000 to 25,000 people per year (equivalent to one-quarter of the city's population).

Although considered to be a cultural anchor organization for the City, the Waterloo Community Arts Centre struggles constantly with funding and user accessibility. The Centre's operating budget varies from \$210,000 to \$220,000 per year. In 2006, the Centre received a City grant for \$20,000 equivalent to 10% of its expenses. Although the building is owned by the City, which oversees upkeep of its exterior, Waterloo Community Arts Centre pays for renovations, utilities and general maintenance of the interior. As there is no elevator, the second and third floors are not accessible for physically disabled users and some activities/programs. The third floor is presently being renovated.

Recommendation: Waterloo Community Arts Centre

- **That the City consider allocating capital funds to ensure that the Waterloo Community Arts Centre, a significant heritage building be brought up to heritage building standards, and meet the requirements of the Ontarians with Disabilities Act 2005.**

- **That in recognition of the Waterloo Community Arts Centre as a focal point and catalyst for cultural development in Waterloo, the City consider including annualized funding for the Centre via the proposed Community Partnership and Investment Fund. In setting this budget amount, the City staff should consider annual municipal per capita investments in similar facilities in other comparable “creative cities.” In addition, economic indicators, such as jobs created in the cultural sector and tourism opportunities should be considered as well.**

- **That in order to meet the future growth and development of Waterloo’s cultural needs, a feasibility study to relocate or expand the Waterloo Community Arts Centre should be undertaken over the longer term.**

7.9 Public Square

OVERVIEW

Vibrant, distinctive, authentic urban environments are accepted as key cultural elements in creating a sense of place and a strong economic foundation. Waterloo’s focus on its historic downtown core, or Uptown as it is now called, has continued as a strong planning direction as the cultural, entertainment and recreational heart of Waterloo since Abraham Erb established his mills as a magnet for commercial, residential and industrial growth, and recognized the value of a central gathering place by donating land for a town square in the 19th century. Significant initiatives include the formation of the Uptown Visions Committee in 1992 as an advisory committee to Council, and the Uptown Strategy Study (2003), which called for “a clear, integrated strategy and action plan to maintain strong vibrant core.” Access throughout the downtown area has been enhanced with the Uptown Loop trail throughout the Uptown area has been put in place to encourage foot traffic and exploration of the Uptown area.

As it has developed, Uptown now offers a critical mass of cultural, retail, educational, built heritage, residential, recreational and knowledge-based features and organizations. These include the Perimeter Institute for Theoretical Physics, the Canadian Institute for Governance Innovation, the Canadian Clay & Glass Gallery, the Waterloo Memorial Recreation Centre, the Waterloo Train Station Visitor Information Centre, the Tourist Train, the Waterloo Public Library, the MacGregor/Albert Heritage Conservation District, the Seagram Lofts, the Uptown Loop Walks, the reconstructed Erb gristmill building, Waterloo Park, the Silver Lake interpretive walk, the proposed infill Barrel Works condominium development and the Balsillie School of International Affairs, the

Waterloo Community Arts Centre, Waterloo City Hall, and a host of galleries, restaurants, retail outlets, and built heritage structures.

The addition of the King Street Public Square to the Uptown area offers a new public gathering space in the spirit of Abraham Erb's original 19th century vision for a central public square. It has potential to become an arts and heritage hub for permanent displays of public art and heritage interpretation, as well as an event venue and gathering space. As with other event and gathering locations, all seasons programming of the Public Square should be a collaborative effort between the Waterloo Cultural Council and the City of Waterloo.

Recommendation: King Street Public Square

- **That the City move to recognize and celebrate the establishment of the King Street Public Square as a year-round focal point for cultural events and a gathering point for public art, heritage interpretation and events. Recognition could take the form of:**
 - **Holding a naming contest for the Square;**
 - **Holding a juried competition for a public art installation;**
 - **Issuing a call for an interpretive plan for the Square.**
- **That the City should ensure that the King Street Public Square is integrated into the Uptown Loop trail to enhance access to the Square.**
- **That as with other event and gathering locations, programming of the Public Square be a collaborative effort between the Waterloo Cultural Council and the City of Waterloo.**
- **That the operational and programmatic planning of this venue be integrated with the recommendations on Festivals and Events in Section 8.0 of this Master Plan.**

7.10 Elam Martin Farm

OVERVIEW

The Elam Martin Farmstead, located on 11.8 acres of land in RIM Park, is a designated property owned by the City of Waterloo and managed by the Asset Management Division of the Corporate Services Department. Since 1820, when it was first settled by Mennonite David Martin, the farmstead has been continuously occupied by the Martin family who continues to live there today under an informal agreement. The house, associated outbuildings, kitchen garden and orchards are considered to be characteristic of Waterloo County Mennonite farms.

The farmstead is well placed for public access and interpretation. The Walter Bean Grand River Trail runs past the site and interpretive panels are placed outside the immediate farmstead area to inform visitors of its significance. Most of the lands to the north and east of the house have been developed as a golf course as part of the RIM Park facilities.

The 2003 Preservation Master Plan, Elam Martin Farmstead by Goldsmith, Borgol and Company Ltd. and Landplan Collaborations Ltd., Landscape Architects and Heritage Planners, resulted in recommendations ranging from “do nothing” to development of the site as a programmed, museological setting. A common thread that emerged during the 2003 consultations was the need for continued occupancy of the site by a caretaker to ensure security and maintenance. This model is used by other historic sites including the Brubacher House at the University of Waterloo.

Consultations for the Recreation and Leisure Master Plan echoed many of the same opinions as in 2003, the most significant being that there is no need for another Mennonite museum in the Kitchener Waterloo area. Examples of existing museums include the Joseph Schneider Haus Museum and Gallery and the J. Steckle Heritage Homestead, both in Kitchener.

The Mennonite presence throughout the Region of Waterloo and southern Ontario is visible and strong. In addition to the three sites mentioned above, resource centres include the Conrad Grebel Mennonite University Library and Archives in Waterloo, the Erb Street Mennonite Church in Waterloo, the Mennonite and Brethren in Christ Resource Centre in Kitchener, and the Mennonite Church Eastern Canada in Kitchener.

Recognizing that the Elam Martin Farmstead represents a significant historic resource related to the cultural founding history of the City of Waterloo, and in keeping with the community development approach of this Master Plan, it appears that the next step would be to form a community-based organization to work with the City and the Martin family to plan the future use of the Farmstead.

This approach would indicate respect for the Martin family's heritage and links to the property, draw upon the heritage, knowledge, and networks of the Mennonite community locally, regionally and nationally, and further the City's efforts to develop community capacity in cultural planning. This initiative will need to also consider capital and operating funding needs and sources in order to support any development initiatives for this venue.

Recommendation: Elam Martin Farm

That the City work with local and regional Mennonite and heritage communities to form a governing organization to plan the use and interpretation of the Elam Martin Farmstead as a significant historic resource related to the cultural founding history of the City of Waterloo.

7.11 Establishing a Cultural Communications and Information Web Portal

OVERVIEW

In today's internet-savvy world, particularly as related to youth and young adults, a dedicated web portal to distribute information and facilitate information about cultural issues and events is important. The large number of youth who attended the April 2008 consultation session indicated that information about the session had been passed on to them through the Face book network.

Waterloo's high tech community offers an ideal community within which an innovative cultural web portal can be established. An interesting model for this is the IGLOO on line network established by the Centre for International Governance Innovation to facilitate knowledge exchange between individuals and organizations studying, working or advising on global issues.

Recommendation: Web Portal for Arts, Culture and Heritage

That the City should work in collaboration with the Waterloo Culture Council and research institutions like the University of Waterloo to develop a dedicated cultural web portal to distribute information and facilitate information about cultural issues and events as per Section 3.6, Customer Services and Services Planning recommendations in the Master Plan.

7.12 Building Cultural Capacity through Adaptive Reuse of Existing Facilities

OVERVIEW

Culturally, the City of Waterloo has two cultural facilities in its inventory of venues. The Canadian Clay and Glass Gallery is a dedicated venue and the Waterloo Arts Centre is a multi-use community space.

Concerns that emerged from consultation with performing arts groups included a perceived lack of suitable exterior and interior rehearsal, performance and storage space and / or information about affordable spaces that were available in Waterloo. In particular, cultural groups indicated a need for a mid-size (~500 seats) performing arts theatre space in the city.

A review of theatres and recital halls in Waterloo indicates three theatres at the University of Waterloo ranging in size from 70 to 500 to over 700 seats. Wilfrid Laurier University has two theatres ranging in size from 225 seats to 327 seats. The Princess Theatre has 185 seats, and the Waterloo Community Arts Centre has a space for 100 people. The Clay and Glass Gallery has space for up to 500 people depending on the type of function. All spaces are available for rent depending upon availability, and most have not-for-profit rental rates.

In addition to these, Waterloo Park has an exterior performance space, and the City's recreation centres have various rooms for rent, including a stage at the Manulife Sportsplex in RIM Park.

In Kitchener, performing arts spaces range from 2,047 seats at Centre in the Square in Kitchener to 150 to 200 in smaller venues.

Based on this inventory and the City's capital budget limitations for the next ten years, it would appear that performing arts and other cultural groups would benefit from a two-pronged approach to space challenges:

- A central "clearing house" portal providing information about space availability, prices and scheduling. This portal, which would be updated daily by the City, could be part of a proposed cultural web portal.
- Retrofitting and upgrading of existing spaces, particularly in Waterloo Park and the City's recreation centres to meet the needs of performing arts groups. Items to be considered include wall colour, lighting, seating, acoustics, original art, signage, etc.

Recommendation: Adaptive Reuse of Existing Facilities

- **That the City establish a central "clearing house" portal providing information about space availability, prices and scheduling. This portal, which would be updated regularly could be part of the proposed cultural web portal.**
- **That the Department initiate a project to determine the extent to which facilities in Waterloo Park and the City's recreation centres require retrofitting and upgrading to meet the needs of performing arts, cultural and other non-sports groups building on any Condition Studies completed to date. This needs analysis should include:**
 - **Consultation with performing arts and cultural and other non-sports groups;**
 - **Assessment of existing facilities to determine requirements;**
 - **Issuing a Request for Proposals to local artists, designers and other appropriate consultants / suppliers;**
 - **Design and costing of identified spaces and features;**
 - **Implementation of upgrades and retrofits.**

8.0 FESTIVALS AND EVENTS STRATEGY

8.1 Strategy Assessment

.1 INTRODUCTION

The term “event” is used to describe those activities planned to mark special occasions and/or to achieve specific social, cultural or economic objectives. In the past major sporting events were often treated as a separate and distinct from events. The trend in recent years has been to recognize that all events – whether focused on culture, heritage, sport or otherwise – share a number of common attributes. For the organizer, an event is a one time or infrequently occurring event outside normal programs or activities. For the visitor, an event is an opportunity for a leisure, social or cultural experience outside the normal range of choices or beyond everyday experience. Appendix I contains additional strategic assessment information

.2 ATTRIBUTES

Events share some or all of the following attributes:

- Attracting tourists or tourism development;
- Being of limited duration;
- Being a one-off or infrequent occurrence;
- Raising the awareness, image or profile of a region;
- Attracting media attention;
- Having a large economic impact;
- Being out of the ordinary or unique.

Based on these attributes, events can be defined as “one time or infrequently occurring event of limited duration that provides the consumer with a leisure and social opportunity beyond everyday experience. Such events, which attract or have the potential to attract tourists, are often held to raise the profile, image or awareness of a region.”

Although there are no universally accepted definitions, the most common terms used to describe events include mega-events, hallmark events and local/community events.

Mega Events, by virtue of their size or significance, yield extraordinarily high levels of tourism, media coverage, prestige, or economic impact for the host community or destination. These itinerant events typically require competitive bidding, often with national or state government support. Examples include the Olympic Games, Commonwealth Games and World Fairs. Mega events may be distinguished by their focus on international participation and visitation, level of public funding, infrastructure and legacy development, and economic impact.

Hallmark Events are recurring events possessing such significance, in terms of tradition, attractiveness, image, or publicity that they provide the host community with a competitive advantage. Over time, the event and destination can become inseparable in terms of their image. Examples include New Orleans' Mardi Gras, the Indianapolis 500 or the Edinburgh International Festival.

Local/Community Events are typically family-oriented events that are directly or indirectly controlled by the host municipality. Such events rely heavily on local volunteers and public funding, are typically free of charge and occupy municipal venues at limited or no cost. These events are targeted mainly at the local audience, and have non-economic goals such as building community pride, encouraging participation in culture, heritage or recreational activities, or civic celebrations. Local or community events have the capacity to evolve into hallmark events.

While the term event can be applied to civic celebrations, cultural performances, sports contests and a wide range of commercial or corporate functions, our focus in this section of the report is on events related to civic celebrations, culture and heritage.

Throughout this document, there is reference to local residents and tourists. The term local residents is relatively straightforward and refers generally to "daytrip" visitors whether from the Waterloo Region or beyond. A tourist is defined by Statistics Canada as a person undertaking:

All overnight trips, regardless of the distance travelled, and same day trips with a minimum one-way distance from a respondent's home of 40 km, excluding trips taken as a member of an operating crew of a bus, plane, truck, ship etc., commuting to one's usual place of work or school, or moving to a new residence.

The distinction between local residents and tourists is particularly important in assessing the economic impact of an event, as local residents typically generate much less economic impact than tourists.

.3 STAKEHOLDER CONSULTATION

Two focus groups were held for festival and event stakeholders, and one-on-one interviews were conducted with event organizers not able to participate in either of the scheduled focus groups. The research identified a number of issues that should be addressed within the Master Plan.

With respect to RIM Park, the balance between community use and revenue generation must be clarified. Increased revenue generation through outside events will likely lead to further displacement of community-based programming and sports league activity. This problem is not unique to RIM Park – many public facilities that are expected to cover debt service, facility operating costs and capital replacement face the same challenge.

While the current administrative practices for permits, approvals and grants were not cited as being particularly onerous, event organizers would like to see faster response times, and ideally a “single window” system implemented for permits and approvals. Event organizers would also like to see an increase in the funds available through municipal grant programs.

The City’s vision for the new Public Square contemplates an actively programmed venue, involving both the Square and the street in support of a range of small to large events and activities taking place throughout the year. It is unclear whether the City has adequately assessed the operating cost of achieving this vision, and whether such funds have been included in future Recreation and Leisure Services operating budgets. In Appendix II, financial and programming details are provided for Yonge-Dundas Square, a 28,000 square foot urban plaza in downtown Toronto are provided. While the market trading areas are obviously quite different, the information is nonetheless informative. If the City’s vision for the new Public Square includes an ongoing calendar of free public events, resources will have to be provided in the City’s budget to underwrite administrative, marketing and programming costs. The Square is too small to provide sufficient sponsorship, advertising or other revenue generating activities to fully underwrite a program of concerts, film screenings, street performers or other public events.

Perhaps the most significant issue to be addressed in the Master Plan is the sustainability of the City’s major events, specifically those produced and delivered directly by the City or the UpTown BIA.

There is an axiom in the event industry that “every event is one board member, sponsor or grant away from disaster”. Given the limited municipal and BIA resources devoted to festival and events, Waterloo offers a commendable annual calendar of events. However, the events delivered by the City and/or the BIA rely heavily on a small group of City and BIA staff, and on the ongoing financial

support from the City and the BIA. Accordingly, these events are vulnerable to changes in personnel or strategic direction. The financial model and organizational infrastructure are not in place to provide event continuity should there be personnel changes or budget cuts at either the City or the BIA.

A number of BIAs across Ontario have stepped back from direct delivery of events, citing the burden placed on their limited staff resources and lack of consensus amongst members as to the efficacy of events in achieving BIA objectives. In some cases events have been cancelled entirely, and the resources re-directed to other marketing activities or capital projects. In other cases the events have been handed over to stakeholder groups for ongoing delivery.

.4 STRATEGIC FRAMEWORK

Based on the input received from the focus groups and interviews, the review of festival and event venues, and the assessment of current organization structure and operating practices, the following strategic framework is suggested for development and addresses the following issues:

- What are the principal benefits the municipality hopes to obtain from festivals and events, i.e.: facility revenue generation, municipal economic impact, community development, etc? What priority should be assigned to each of these potential benefits?
- What role should the City play in festival and event delivery?
- How should staff and volunteer resources be organized to provide enhanced service in a more cost effective manner?
- What forms of municipal support should be provided to festival and event organizers?

As noted earlier, festivals and events can deliver a range of benefits including:

Community Development Benefits

1. Celebrating culture and heritage
2. Encouraging active participation in selected activities
3. Providing a showcase for local athletes, performers and artists
4. Building civic pride

5. Creating greater awareness of the community or hosting organization

Economic Development Benefits

1. Generating economic benefits for communities, local business and other stakeholders.

Community Development benefits can accrue from events of all size and, while difficult to quantify, are often more substantial than economic benefits. This is almost always the case with small to medium size events.

The statistical analysis presented earlier clearly indicates that small to medium size events (i.e. those with attendance under 20,000) draw the majority of their visitation from the local community. And for events of all size, the incremental tax benefits are far greater for the senior levels of government. Accordingly, if festivals and events are to be viewed as a means of economic development for the City of Waterloo, the focus must be on attracting significant numbers of high yield participants from outside the community; encouraging these participants to extend their stay and increase their expenditures in the community.

At present, only the Kitchener-Waterloo Oktoberfest can rightfully be considered a Hallmark Event with significant economic impact. While other recurring annual events have the potential to develop into Hallmark Events, the research into major event strategies and best practices indicates that to do so would require a significant investment of public funds. Furthermore, given the size of the population in the day trip market trading area and the relatively small accommodation base in the city, capturing the full economic potential of special events would be difficult.

With the exception of a limited number of civic celebrations that can rightfully claim to benefit the entire community, most festivals and special events would be considered small to medium local / community events, focused on delivering benefits to a specific sub-group of the community – a neighbourhood, business district, ethnic group, sports group, etc. As the benefits tend to fall primarily to this sub-group, it is reasonable to allocate the principal responsibility for event delivery to those that most directly benefit. With the exception of a very limited number of direct delivery events, municipal staff resources should be focused on facilitating the production and delivery of events by third parties. However, the staffing level and strategy should be integrated into the overall Department reorganization initiative.

8.2 Recommendations

Recommendations – Festival & Event Benefits

- **That the City of Waterloo categorize its festivals and events into those that deliver primarily Community Development benefits and those that deliver primarily Economic Development benefits.**
- **That an Event Evaluation Framework be established to determine which of these two categories an event falls into. The primary criteria to be used in establishing an overall event framework for the two categories should consider:**

Community Development Benefits

- **Opportunities to showcase local residents (e.g. artists, athletes)**
- **Opportunities for volunteer engagement**
- **Outside media coverage**
- **Opportunities for resident participation**
- **Opportunity to showcase local culture and heritage**
- **Linkage to Municipal strategic plan**
- **Legacy development**

Economic Development Benefits

- **Event size (attendance) and Uptown location**
- **Out of out of town visitation**
- **Overnight visitation**
- **Event expenditures**
- **Visitor Expenditures**
- **Local versus non local expenditure capture**
- **Event duration (single or multi day)**
- **Seasonality**

- **That events generating high yield visitation (out of town, ideally overnight visitation) and high yield expenditures (i.e. captured by local businesses and workers) would be categorized as Economic Development events. All others would be categorized as Community Development events.**
- **That the City should focus its efforts on maximizing the Community Development benefits of existing events, and supporting new events focused on Community Development benefits.**
- **That since the benefits for most events tend to fall primarily to a specific sub-group of the community, the principal responsibility for event delivery should be assumed by those that most directly benefit.**

Recommendation: Festival and Event Delivery

- **That the City consider transitioning from direct delivery of festivals and events by developing the organizational capacity amongst the stakeholder groups that most directly benefit from the event. Direct delivery should be limited to civic celebrations aimed at the community at large and should be considered only when it becomes apparent that a suitable community group cannot be found or established for the delivery of the event. (The University of Waterloo's Canada Day Celebrations provide an excellent example of a service delivery model for a civic celebration.)**
- **That the management model for the Public Square should provide direct delivery of selected events and activities aimed at site animation. This could include small concerts and other live entertainment, film screenings, street performers and similar activities. The management and funding of these small activities should remain the responsibility of the City for the foreseeable future. The budget for the operation of the Public Square should include sufficient funds to manage this ongoing programming plus funds for the program content, marketing and administration.**

- **That the Public Square activities of a larger scale, such as a new festival or recurring events such as a crafters or farmers markets, should only be considered if third party management is a viable long term option.**
- **That the staff, volunteer and organizational resources for City festival and event involvement be integrated into the proposed Department organizational review recommended in Section 3.0 of the Master Plan.**
- **That consideration be given to removing non-sporting events from RIM Park where acceptable alternative locations are available and sport-oriented activities and / or events need the space.**
- **That a cross Department and interdepartmental team be organized under a Festivals and Events Team or Single Window format to the extent possible, in order to reduce the time required for event organizers to identify and access the municipal information, services and approvals required to stage an event. This should also include ensuring compatible and appropriate programming coordination between the Public Square and Waterloo Park.**
- **That additional municipal support should be provided by way of municipal grants as per the proposed Community Partnership and Investment Fund recommendation of Section 4.2.3 of the Master Plan, and should be linked to the alignment of the event deliverables with municipal goals and objectives.**
- **That an Event Organizer's Toolkit should be developed and made available on line for all event organizers. An outline of the Toolkit is provided in Appendix III.**

Recommendations: Municipal Support for Festivals and Events

- **That the Evaluation Framework referenced in Section 8.0 be used in support of development of the criteria and threshold for the proposed Community Partnership and Development Fund. These Strategic Imperatives form the framework for the development of specific evaluation criteria to be used in this stage of the event evaluation.**

- **That grants should give priority to capacity development for both Community Development and Economic Development events. For Economic Development Events, additional funding should be available for programs and initiatives specifically designed to generate enhanced economic benefits through increased visitation and visitor expenditures.**

- **That those sections of the City's website related to events and municipal venues should be reviewed from a user's perspective to identify opportunities for improved access and easier navigation. Linkages to other websites, such as the Region of Waterloo festival and event listing, the Festivals and Events Ontario on-line event calendar and the Ontario Ministry of Tourism on-line events calendar should be considered and regularly updated.**

9.0 IMPLEMENTATION PLAN

9.1 Introduction

The preceding sections of the Recreation and Leisure Services Master Plan for the City of Waterloo identify over seventy individual recommendations across the Master Plan's strategic foundation, policies and strategies, service organization and delivery, recreation and leisure facilities, parks and open space, culture and heritage and festivals and event themes. Some of the recommendations are significantly strategic, such as the Department of Recreation and Leisure Services proposed reorganization and repositioning. Other recommendations are more process and procedural, but also make important contributions to the Vision, Mission and Goals of the Master Plan.

The intent of the implementation plan, is to provide a structure or roadmap for the ongoing implementation of the recommendations and the periodic review of the Master Plan as it moves forward through time. As currently written, the Master Plan covers a twenty year period from 2009 to 2028. The first ten years of the Plan have a sharper focus and intent as the research, demand and related information and assessments are more current and assessable. The longer term perspectives after ten years, will be subject to significant change, policy and other impacts that will emerge with the municipal operating environment as it continues to evolve.

The following material establishes a basis upon which to begin to initiate the implementation plan. It needs to be recognized, that there will be considerable organizational and development work required for virtually all the recommendations. Some recommendations will require specific projects, a range of research needs, important consultation strategies and fiscal assessments, both strategic and tactical, in order to facilitate the Master Plan's implementation. In this light, the implementation plan is a roadmap, recognizing that there may be different ways of getting to the same endpoint, but the overall goal is to continue to move forward and to arrive at the preferred destination.

9.2 Implementation Themes

Throughout the course of the research, consultation and the Master Plan's development, three key themes emerged that will influence the implementation and future outcomes of the Master Plan's recommendations. These are:

- The need for flexibility to effectively, and on a timely basis, respond to continuous change, some of which will be of high impact, such as healthcare and environmental priorities, changing municipal government responsibilities, aging and culturally diversifying populations and other perspectives;
- A strong community view on the need for the City to reposition its Recreation and Leisure Services roles and investments more substantively into the areas of community development and capacity building as a basis to support a stronger and more sustainable community-based recreation and leisure services delivery model, with an increasing importance and emphasis placed on arts, culture and heritage services;
- The reality of capital and operating funding constraints that exist within the City of Waterloo, and will for an extended period of time, potentially into the post-2019 to 2025 timeframe as outlined in the Situational Analysis Report.

9.3 Policies and Strategies Integration

An important consideration for the implementation of the Recreation and Leisure Services Master Plan is its integration with a series of policy and strategy initiatives ongoing within the Department and the City, ranging from the City's Strategic Plan, to the West Side Recreation Complex project and other connected perspectives. The Master Plan does not stand alone as do any of these other initiatives. Therefore, the Department will need to exercise leadership and action to ensure that all the planning, policy and direction setting initiatives involved are effectively integrated, both in terms of the intent of their outcomes and the specifics of their actions and processes.

The following points represent some of the key areas of potential integration with the Master Plan:

- **Strategic Plans** – The City has a Strategic Plan that establishes key directions, and a vision with respect to partnerships, community empowerment, the environmental, capital and operating financing priorities and related considerations.

- **Best Practices** – As with most municipalities, this is an ongoing, corporate initiative which has potential points of integration with respect to how the City delivers services, the integration of City services across its various departments and a series of other areas that could influence or connect with components of the Master Plan.
- **Tourism Integration** – The City has a number of facilities that represent significant opportunities for tourism development, cross marketing and sales. Also, the City has been party to the development of the Waterloo Region Tourism Organization and a joint Kitchener-Waterloo report on a Sport Tourism Strategy. Therefore, integration with the City's tourism directions needs to occur in order to maximize the benefits to both the residents of the community and visitors to Waterloo from a user / customer perspective, as well as from community development and economic goals.
- **Uptown Waterloo** – As with most communities, continuing efforts are in place for the establishment of a vibrant and viable Uptown area in Waterloo. To this end, the City has developed an Uptown Plan to guide the development and improvement of this area. The ongoing development of the area, the Public Plaza, a potential cultural node and related initiatives within the Master Plan have crossovers with specific initiatives for the Uptown area.
- **Community Use of Schools** – Schools can provide multiple venues at different standards of service, such as secondary and elementary schools, for recreation and leisure services, particularly at the neighbourhood level. Continued and further use of these resources is important to the community in terms of key Master Plan strategies for both the neighbourhood servicing level recommendation and city-wide services. Using all the community's resources achieves the most effective and efficient service delivery strategies for recreation and leisure services.
- **Infrastructure Renewal Program** – Another key strategy is to ensure that all new and / or upgraded facility initiatives are fully integrated with the capital improvement and retrofitting strategies of the City, in order that a comprehensive picture of future capital replacement and upgrading costs are identified early. Operational and functional utility of individual facility resources needs to be continuously developed in order to meet the changing needs of the users and the community. This strategy needs to focus on safety, minimizing operating costs, maximizing use and revenues and sustaining the community's long term benefits from their initial investment in a facility.

- **Development Charges** – Development Charges are a significant capital funding source with respect to new recreation and leisure facility development that responds solely to population growth. Ensuring that the purpose and application of the Bylaw is fully realized on behalf of the whole community is an important strategy and policy linkage that will need continuous planning and monitoring in order to determine the most appropriate application of these funds and the facilities that best reflect the intent of the By-law and the Master Plan on a long term basis. For Waterloo, current capital funding plans essentially allocate all current and some anticipated Development Charges revenues.
- **City Role** – One of the most strategic transition points identified within the Master Plan is the movement of the City's Recreation and Leisure Services into a stronger, more evident partnership development and community support role as the first order of involvement in any specific service initiative. In this role, the Department would act as an identifier of community needs, an organizer of partnership opportunities, a potential partner, as well as a partnership support resource. Within other contexts, the Department could be a direct developer and operator of selected service delivery initiatives. This policy and strategy perspective requires repositioning and reflects a change that will need both departmental and community education, a planned approach and the tools to be effectively implemented. The Leisure Services Delivery Policy is one of the components that support facilitating this transition, as are recommendation on services delivery, community investment funding, partnerships and other Master Plan recommendations.

These and other current and future policy and strategy initiatives need to be incorporated within the context of the implementation of the Master Plan. In some cases, the Master Plan itself will be a significant influence on other policies and strategies, while in other cases, it will be influenced by these external elements. Whatever the impact, the need to ensure that all the various initiatives are linked and integrated is an important implementation task that the Department will need to ensure is identified, practices and evaluated on an ongoing basis.

9.4 Implementation Framework

The Master Plan's recommendations have been developed to various degrees around the three themes outlined above. As a result, and unlike most municipal Master Plans for this service sector, the City of Waterloo's Recreation and Leisure Services Master Plan is more significantly focused on policies, strategies, the City's role and reorganizational and repositioning initiatives. It is significantly less focused on facilities and land resources development. In part, this is because the City has, over the last twenty years, developed extensive recreation and leisure facilities and

parkland at significant quality levels. As a result, outside of the West End Recreation Complex project, there is more limited need for major facilities development. Also, higher cost resource development initiatives are challenged by the capital funding constraints the municipality is experiencing now and for a significant period of time. Therefore, the Master Plan has to be sensitive to this important reality.

In the parks, open space and trails area, the City has, similar to recreation and leisure facilities, acquired a significant array of parkland and open space, culminating in the acquisition of the McNally Lands. It also has developed a strategic acquisition fund to support these types of initiatives. The community trail system has evolved effectively. The Official Plan and other directions, along with the long-term capital funding forecasts, identify continuing priority for and investments in trail development.

Most of the community trail recommendations in the Master Plan, beyond supporting continued trail development, are associated with improving signage, awareness, safety, accessibility and utilization perspectives.

The Master Plan identifies one significant area of growth, that is in the arts, culture and heritage areas. Based on the consultation and research, the City has a rich capacity and tradition in these areas. However, the general perspective presented was that these areas are underdeveloped and undervalued. What became apparent, was the need to create a stronger foundation in order to build value for these resources and services, to grow the capacity of the community and sector participants and to develop a long-term strategy so that arts, culture and heritage services can flourish in the community in parallel and equitably with what has evolved over time for recreation, leisure, parks and open space.

The trends in arts, culture and heritage, and the ongoing research, indicate the important contributions that these service sectors can make to the quality of life, to economic growth and to the overall building of sustainable and healthy communities. Therefore, the Master Plan has developed an approach that indicates that a specific cultural master planning process is needed to bring stakeholders together, to create a Vision, to build capacity and to articulate specific initiatives and strategies that will achieve the long-term growth, sustainability and contributions of the sectors. This section of the Master Plan presents a variety of ideas and strategies that can become important supports, points of discussion and development inputs to a Cultural Services Master Plan as have been prepared in many municipalities. A key conclusion of the Master Plan, is not only the underserved and undervalued considerations that have emerged, but also that a strong

foundation and strategic direction needs to be established to successfully move these sectors forward as has occurred for other key community services in Waterloo.

The Master Plan has limited identification of major capital initiatives, though some are evident mostly via current initiatives, such as the West End Recreation Complex and community trail development. The significant new capital investments indicated represent the longer-term development of soccer / sports fields over twenty years, a skateboard plaza and several splash pads. What ultimately evolves in this area will be dependent on several key variables that are still yet to be determined:

- The outcomes of the Bechtel Park and Waterloo Park Master Plans;
- Whether the growth curve for youth and adult soccer continues at its substantive rate of the last ten years;
- The ability to intensify current soccer field utilization, whether at schools or in parks, with lighting, irrigation, artificial turf, etc.;
- The ability of the community to invest in soccer field development in partnership with the City;
- The opportunity to build partnerships and joint use situations that will capitalize on both development and efficiency opportunities.

Other potential capital investment projects may emerge from the various planning processes that are identified. However, these planning processes will be spread over a number of years and will be subject to the same fiscal constraints, need for community investment and other factors that have been identified throughout the Recreation and Leisure Services Master Plan.

Table 9-1 provides, in chart form, an implementation plan, which outlines priority and timelines, descriptions, rationale, leadership roles, capital funding and sourcing and some selected performance measures. The intent of the charts is to assist the Department of Recreation and Leisure Services and other involved Departments and the community, to initiate the necessary leadership identification, planning process development, financial planning and other tasks necessary to move each of these recommendations forward through the life of the Plan.

The priority code used in the charts denotes five year timing increments:

A – 2009 to 2013 B – 2014 to 2018 C – 2019 to 2023 D – 2024 to 2028

Also important to consider is that the first position title identified in the Responsible Party / Parties column holds the responsibility to initiate and drive the policy, strategy of project to completion. The other identified parties are likely to also need to be engaged.

The City of Waterloo is currently recruiting a new General Manager, Recreation and Leisure Services. This position is identified as having the lead responsibility for many of the implementation initiatives, particularly in regard to Department repositioning and reorganization. Therefore, the timing of this new person being in the role and in a position to meaningfully fulfill the leadership roles identified will influence when many of the Master Plan tasks will be launched and finalized. Therefore, some of the projected completion dates may need to be adjusted once these factors become known.

**Table 9-1
City of Waterloo
Recreation and Leisure Services Master Plan Implementation Framework**

Master Plan Recommendations	Priority / Year Completed	Description / Target Audience	Rationale	Responsible Party / Partners	Estimated Capital Cost	Source of Capital Funding	Performance Measure
2.0 Recreation and Leisure Services Master Plan Foundation							
.1 Recreation and Leisure Services Delivery Policy Framework (Pg 2-2)	A 2009 / 2010	For all City recreation, leisure and related service initiatives	To create a consistent evaluation framework for City involvement in and approach to recreation and leisure services development and delivery	<ul style="list-style-type: none"> • General Manager, Recreation and Leisure Services Department Services • Other Departments as appropriate • Community consultation as required 	N/A	N/A	

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3.0 City Services Delivery Organization							
.1 Recreation and Leisure Services Department Roles and Priorities, including Cultural and Events Organizational Capacities (Pg 3-3, 3-7)	<p align="center">A</p> <p align="center">2009 / 2010 for planning and approval</p> <p align="center">2009 to 2012 for full implementation</p>	<p>Involves undertaking assessments and the formulation of plans to both reorganize the Department's staffing functions and resource allocations; and to reposition current and future servicing roles</p>	<p>Over five years, to reposition the City's role in recreation and leisure service delivery to reduce direct delivery where feasible and alternatives exist.</p> <p>To align the Department's organizational structure to support changing roles related to enhanced community development and capacity building strategies that support the goals and directions of the Master Plan</p>	<ul style="list-style-type: none"> • General Manager, Recreation and Leisure Services • CAO • Other Departments as appropriate • Community consultation, education and development programs 	<ul style="list-style-type: none"> • \$50,000 to \$75,000 for research, analysis and development • Implementation costs to be determined via plans 	<p>Capital Budget</p>	<p>Reorganization and repositioning fully in place by 2013</p>

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Master Plan Recommendations	Priority / Year Completed	Description / Target Audience	Rationale	Responsible Party / Partners	Estimated Capital Cost	Source of Capital Funding	Performance Measure
.2 Neighbourhood Services Strategy (Pg 3-9)	A 2010 / 2011	Create a targeted recreation and leisure servicing tier at the neighbourhood level, using neighbourhood organization capacities, resources and existing venues to complement community and City-wide servicing tiers	To develop a neighbourhood level servicing capacity as basis to bring services to neighbourhoods, increase participation, reduce travel and build neighbourhood affinity and capacity	<ul style="list-style-type: none"> General Manager, Recreation and Leisure Services Other Departments as appropriate Neighbourhood Associations and service delivery partners 	<ul style="list-style-type: none"> To be determined via implementation plan Not to include new facility development. Focus is on using existing facility opportunities 	<ul style="list-style-type: none"> City Capital Budget Neighbourhood contributions / fundraising 	<ul style="list-style-type: none"> Ten service partnerships established by 2013 Twenty service partnerships established by 2018
.3 Volunteer Sector Services Delivery (Pg 3-11)	A 2010	Create supports to assist volunteer leadership with delivery of services	To support movement to a stronger volunteer sector delivery strategy	<ul style="list-style-type: none"> General Manager, Recreation and Leisure Services Community Services delivery organizations Community Consultation 	Integrated into Department recognition plan		<ul style="list-style-type: none"> Increased role and capacity of volunteers and voluntary organizations is established and delivering services

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Master Plan Recommendations	Priority / Year Completed	Description / Target Audience	Rationale	Responsible Party / Partners	Estimated Capital Cost	Source of Capital Funding	Performance Measure
.4 Customer Service And Service Planning (Pg 3-12)	A 2010	Establish single point of service, develop technology supports and work with service providers on customer service improvements	To continue the City's customer service enhancement program	<ul style="list-style-type: none"> • General Manager, Recreation and Leisure Services • Other Departments as appropriate (IT, etc.) • Community Services delivery organizations • Community consultation as appropriate 	To be determined within Technology Plan	City Technology Investments	<ul style="list-style-type: none"> • Fully operational by end of 2010 • Annual customer service survey score to reach 90% satisfied / very satisfied by 2013
.5 Financial and Funding Initiatives (Pg 3-14)	A 2010 / 2011	<p>Three financial / funding tasks related to community fundraising requirements, RIM Park debt charges to operations and use of capital surcharges are to be assessed and finalized.</p> <p>Integrate surcharges assessment with work on User Fee Policy</p>	To establish three capital funding and allocation frameworks designed to target capital income sources and to establish an enhanced financial performance comparator base for RIM Park	<ul style="list-style-type: none"> • General Manager, Recreation and Leisure Services • Finance and other Departments • Community consultation on surcharges strategy 	<ul style="list-style-type: none"> • Removal of RIM Park debt charge to operations • Reduce Department's net operating deficit by same amount 	N/A	Initiatives finalized and implemented as approved

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Master Plan Recommendations	Priority / Year Completed	Description / Target Audience	Rationale	Responsible Party / Partners	Estimated Capital Cost	Source of Capital Funding	Performance Measure
4.0 Recreation and Leisure Services Delivery Policies and Strategies							
.1 User Fees (Pg 4-3)	A 2009 / 2010	Transition City user fees and charges for recreation, park and related services to a cost of delivery based model, consistent across all service elements	To create a cost-based, equitable and consistent framework for fees development and application	<ul style="list-style-type: none"> • General Manager, Recreation and Leisure Services Department • Other involved Departments as appropriate • Community Consultation program 	\$10,000 to \$25,000	Capital Budget	Establish an annual % recovery target against defined costs as a basis to develop user fees and charges
.2 Policy Development Initiatives (Pg 4-5)	A 2010 / 2011	Assure policy frameworks for key decision areas are in place	To establish a range of social and operational policy frameworks to direct decision-making on City servicing roles, priorities and directions	<ul style="list-style-type: none"> • General Manager, Recreation and Leisure Services Department • Other involved departments as appropriate • Community Consultation program 	\$10,000 to \$25,000	Capital Budget	Policies approved and operational

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City of Waterloo
Recreation and Leisure Services Master Plan Implementation Framework**

Master Plan Recommendations	Priority / Year Completed	Description / Target Audience	Rationale	Responsible Party / Partners	Estimated Capital Cost	Source of Capital Funding	Performance Measure
.3 Data Collection, Analysis, Evaluation and Performance Measurement Program (Pg 4-8)	A 2010 / 2011	Enhance the Department's ability to assess, evaluate, measure and report on the outcomes achieved and benefits of the City's investments in and future servicing needs and priorities	To establish a comprehensive management decision support, performance measurement and reporting data collection and analytical capacity	<ul style="list-style-type: none"> General Manager, Recreation and Leisure Services Department Other Departments as appropriate (IT, Finance, etc.) 	TBD	TBD	Data collection, analysis and evaluation capacity in place and used to support recommendations, decisions and investments
.4 Community Funding Support Program (Pg 4-11)	A 2010 / 2011	An investment program to support community development and capacity building and the Services Delivery Policy	To develop an integrated and comprehensive community investment strategy that ensures a full understanding of all City investments in recreation and leisure services, and establishes funding envelopes for targeted priorities within a balanced community development and capacity building framework	<ul style="list-style-type: none"> General Manager, Recreation and Leisure Services Department Other Departments as appropriate Community consultation as appropriate 	\$10,000 to \$25,000	Capital Budget	Service Delivery Policy and Department repositioning strategy outcomes financially supported at community level

**Table 9-1
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Master Plan Recommendations	Priority / Year Completed	Description / Target Audience	Rationale	Responsible Party / Partners	Estimated Capital Cost	Source of Capital Funding	Performance Measure
.5 Individual Participant Financial Support (Pg 4-14)	A 2010	Individuals / families who would benefit from participation in recreation and leisure programs but have evident barriers are assisted as part of a broader social and community services strategies	To facilitate access to City recreation and leisure services for people with barriers to participation, and to facilitate improved family and life prospects from social development perspectives	<ul style="list-style-type: none"> • General Manager, Recreation and Leisure Services Department • Other Departments as appropriate • Community consultation as appropriate 	N/A	N/A	<p>Inclusion Principle supported and annual evaluation of benefits / impact reported on</p> <p>May be dependent on Region of Waterloo Policy proposals</p>
.6 Services Planning Strategy Approvals and Implementation(Pgs 4-8, 4-17, 4-19, 4-22)	A 2009 / 2010	All City program, facility and related recreation, leisure and related services development	To establish priorities and approaches as to how the City will approach and evaluate recreation and leisure services initiatives, needs and opportunities	<ul style="list-style-type: none"> • General Manager, Recreation and Leisure Services Department • Other Departments as appropriate 	N/A	N/A	Strategies approved and implemented

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Master Plan Recommendations	Priority / Year Completed	Description / Target Audience	Rationale	Responsible Party / Partners	Estimated Capital Cost	Source of Capital Funding	Performance Measure
5.0 Recreation and Leisure Facility Initiatives							
.1 West Area Multi-Use / Multi-Partner Complex (Pg 5-2)	A 2010 to 2012	Development of a partnership-based facility and sportsfield initiative involving YMCA, Waterloo Public Library, City, Waterloo Minor Soccer and other field users to service the west area of Waterloo	<ul style="list-style-type: none"> To provide a comprehensive recreation and leisure facility for the growing west area of Waterloo To address needs for soccer fields to service a high growth youth and adult activity on a City-wide basis 	<ul style="list-style-type: none"> City of Waterloo K-W YMCA Waterloo Public Library Waterloo Minor Soccer Other field sport organizations 	As per existing agreement for YMCA and Library Field agreements to be negotiated with partners	As per existing agreement and financing plan for YMCA and Library Field agreements to be negotiated with partners	<ul style="list-style-type: none"> Opening of facility and fields by 2013 Meet participate and use targets as per Business Plan Field utilization at 80% in season by 2014
.2 Future Soccer Fields Development (Pg 5-2)	B & C 2014 – 2028	Develop new soccer pitches / use school fields as demand grows on an incremental basis but within a longer term, integrated plan that also incorporates the impacts of the Bechtel and Waterloo Park Master Plans	To ensure adequate sportsfields for soccer, football, rugby and related field sports over the long term	<ul style="list-style-type: none"> City of Waterloo Waterloo Minor Soccer Adult soccer leagues Football, rugby and related sports organizations 	<ul style="list-style-type: none"> \$2 to \$5 million depending on number of fields required due to growth and / or displacement. Consider existing fields use intensification strategies, involving lights, artificial turf, etc. 	<ul style="list-style-type: none"> City based on future targeted Development Charges post 2019 Sports groups and fundraising at 50% 	<ul style="list-style-type: none"> Existing sportsfield utilization at 80% in season before new fields developed

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Master Plan Recommendations	Priority / Year Completed	Description / Target Audience	Rationale	Responsible Party / Partners	Estimated Capital Cost	Source of Capital Funding	Performance Measure
.3 Skate Board Plaza (Pg 5-4)	A 2011	<ul style="list-style-type: none"> Skateboarding continues to be popular, though primarily a young to older teen participant profile. Growth into the adult age segments is occurring No organized focal point or venue is in place to support users and to reduce street and community impacts 	<ul style="list-style-type: none"> To create a contemporary skateboard venue (plaza concept) that will support activity growth related to participants, exhibitions and cultural dimensions To reduce negative street and community impacts and concerns 	<ul style="list-style-type: none"> General Manager, Recreation and Leisure Services Other Departments as may be involved Skateboarders Community consultation 	\$600,000	<ul style="list-style-type: none"> City \$400,000 Fundraising \$200,000 	<ul style="list-style-type: none"> Minimum five exhibitions and competitions per year Minimum of 200 to 300 uses per week in season Minimum 25% reduction in related public complaints
.4 Area Splash Pads (Pg 5-4)	A & B 2011 2014 2017	Add three neighbourhood-based splash pads distributed across the City targeted to the 0 to 12 age child population	To develop neighbourhood-based younger child seasonal activity opportunities to support early childhood development, to support family-based activities and to increase accessibility for all abilities	<ul style="list-style-type: none"> General Manager, Recreation and Leisure Services Other Departments as appropriate Neighbourhood Associations Service clubs / project partners 	\$350,000 \$375,000 \$400,000	<ul style="list-style-type: none"> City at 50% Fundraising / sponsors at 50% 	12,000 attendances per venue annually (200 per day on average over 60 days)

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City of Waterloo
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Master Plan Recommendations	Priority / Year Completed	Description / Target Audience	Rationale	Responsible Party / Partners	Estimated Capital Cost	Source of Capital Funding	Performance Measure
.5 Future Recreation Facilities (Pg 5-7)	C-D <ul style="list-style-type: none"> Needs assessments completed – 2014 to 2018 Development, if required, post 2019 	Support ice, aquatic and centre users based on both community and activity growth needs	To establish a longer term planning and assessment strategy for future major recreation facilities within known capital funding constraints	<ul style="list-style-type: none"> General Manager, Recreation and Leisure Services Other Departments as appropriate User group representatives Community consultation 	To be determined based on long-term Business Plan and Feasibilities Studies	<ul style="list-style-type: none"> City Development Charges Community fundraising / user group contributions Senior government grants as may be available 	<ul style="list-style-type: none"> Current ice facilities at 90% plus capacity for prime time Aquatic facilities at 90% plus use capacity
.6 Sportsfield Operations (Pg 5-7)	A 2009	Sportsfield users and City discussions required to enhance sportsfield operational procedures and role clarification to overcome some existing challenges	To improve and clarify sportsfield operational procedures and roles, awareness, understanding and related considerations	<ul style="list-style-type: none"> General Manager, Public Work Services General Manager, Recreation and Leisure Services Other Departments as involved User group representatives 	N/A	N/A	Clarity of City and service providers roles established

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Master Plan Recommendations	Priority / Year Completed	Description / Target Audience	Rationale	Responsible Party / Partners	Estimated Capital Cost	Source of Capital Funding	Performance Measure
6.0 Parks, Open Space and Trails							
.1 Policy and Official Plan Initiatives <ul style="list-style-type: none"> • Surplus School Lands (Pg 6-2) • Park Naturalization (Pg 6-3) • Parkland Classification and Provisioning Standards (Pg 6-14 to 6-19) • Parkland Dedication and Land Trust (Pgs 6-21) • Official Plan Parkland Policies (Pg 6-22) 	A 2009	In support of underserved, central Waterloo neighbourhoods Provides enhanced policy frameworks Incorporate in new Official Plan Incorporate into policies, and with Land Trust to strategy to be assessed Incorporate in Official Plan	To finalize and implement important policy and Official Plan elements for parks, open space and trails	<ul style="list-style-type: none"> • General Manager, Development Services • General Manager, Public Work Services • General Manager, Recreation and Leisure Services • Other Departments as appropriate 	N/A	N.A	Finalization and alignment completed by end of 2009

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Master Plan Recommendations	Priority / Year Completed	Description / Target Audience	Rationale	Responsible Party / Partners	Estimated Capital Cost	Source of Capital Funding	Performance Measure
.2 Laurel Creek Conservation Area (Pg 6-4)	A 2009-2010 To determine feasibility and scope of opportunity	Use of a major open space land resource that will soon be surrounded by residential development. Could displace the need for larger parkland acquisitions if an agreement could be reached	To assess and determine potential of this venue to deliver possible community and City-wide park and open space opportunities	<ul style="list-style-type: none"> • CAO • General Manager, Recreation and Leisure Services • General Manager, Development Services • General Manager, Public Work Services • Other Departments as appropriate • Grand River Conservation Authority 	To be determined based on feasibility and an agreement being achieved	To be determined based on feasibility and an agreement being achieved	To be determined based on feasibility and an agreement being achieved

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City of Waterloo
Recreation and Leisure Services Master Plan Implementation Framework**

Master Plan Recommendations	Priority / Year Completed	Description / Target Audience	Rationale	Responsible Party / Partners	Estimated Capital Cost	Source of Capital Funding	Performance Measure
.3 Community Trails and Cycling Routes (Pg 6-6)	<p>A 2009 to 2010</p> <ul style="list-style-type: none"> • Policy and planning activities integrated • Assess and respond to safety issues • Trails Master Plan completed • Initiate year-round maintenance of trails <p>A 2010 to 2014</p> <ul style="list-style-type: none"> • Signage, kiosk, etc. • Trail Map development and distribution <p>B 2010 to 2028</p> <ul style="list-style-type: none"> • Trails development as per Trail Master Plan: <ul style="list-style-type: none"> ○ Trail extensions ○ Gap reductions ○ Two connecting Parkway crossings 	Continue to develop new and to enhance existing community trail resources for cyclists, walkers and other users of all abilities	To develop a widely linked, utilized, safe, accessible and known community trail system as both a recreation and fitness resource and as an alternative transportation network	<ul style="list-style-type: none"> • General Manager, Public Work Services • General Manager, Development Services • General Manager, Recreation and Leisure Services • Other Departments as appropriate • Community consultation • Funding sponsors (eg: Adopt-a-Mile) 	<p>Sustain levels of annual investment</p> <p>\$75,000 for a Community Trails Master Plan</p>	<p>City and sponsors</p> <p>City</p>	By 2028, a fully linked community trail and alternative transportation network in place, operating year-round

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.4 Waterloo and Cemetery Services / Bechtel Parks Master Plans (Pg 6-8, 6-10)	A 2009 Plans completed and approved 2010 and beyond implementation	<ul style="list-style-type: none"> Bechtel and Waterloo Park Master Plans currently under development as separate planning initiatives but will impact components of the Master Plan and visa versa Potentially impacts a wide range of park and cemetery uses and users 	To finalize key site-specific Master Plans within a timeline that allows for integration with the Recreation and Leisure Services Master Plan	<ul style="list-style-type: none"> General Manager, Recreation and Leisure Services Other Departments as involved Community consultation as per established planning process 	To be determined	To be determined	<ul style="list-style-type: none"> Master Plans completed and approved by end of 2009 Site Plan outcomes linked to Recreation and Leisure Services Master Plan policy and development frameworks
.5 McNally Lands (Pg 6-11)	A 2012	The McNally Lands represent a unique and exceptional land resource that requires a Master Plan on its future limited development and a Resource Management Plan to sustain and conserve its natural assets and features	To develop and implement a Site Master and Management Plan within the policy and directions framework approved by Council	<ul style="list-style-type: none"> General Manager, Public Work Services General Manager, Recreation and Leisure Services Other Departments as appropriate Community consultation 	To be determined via Management Plan	To be determined via Management Plan	Lands are conserved in perpetuity

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7.0 Arts, Culture and Heritage .1 Culture Plan Development (Pg 7-5) <ul style="list-style-type: none"> • Community Cultural Services Policy (Pg 7-6) • Community Cultural Council and Forums (Pg 7-10 and 7-11) • Cultural Collections and Interdepartmental Teams (Pg 7-13) • Funding Support, Affordable Access and Long-Term Endowment Fund (Pg 7-14, 7-15) • Adaptive Reuse of Existing Facilities (Pg 7-22) 	A 2011 with implementation starting in 2012	<ul style="list-style-type: none"> • Culture, Arts and Heritage is a growing area of interest, participation and enhanced community development • The area is seen as underdeveloped and undervalued and needs a coordinated, community-based initiative to establish a foundation and to guide it's long-term sustainability and contributions to community life 	To establish the specific long-term policy frameworks, partnerships, actions and investments necessary to create a strong and vibrant arts, culture and heritage services capacity in Waterloo	<ul style="list-style-type: none"> • General Manager, Recreation and Leisure Services • Other Departments as appropriate • Cultural and heritage organization representatives • Community consultation 	\$100,000	City	A community supported Master Plan is approved that positions arts, culture and heritage services as a valued contributor to the quality of life of Waterloo residents on a sustainable basis

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.2 Waterloo Community Arts Centre (Pg 7-16)	A 2011	The Waterloo Arts Centre has a number of facility deficits and could play an expanded role as a catalyst for Arts, Culture and Heritage Services development in Waterloo. Its future development requires specific investigations that are coordinated with the Cultural And Heritage Services Master Plan. This assessment could be undertaken concurrently or as part of an integrated project.	To determine the physical plant upgrades required for the Waterloo Community Arts Centre to fulfill its role within the arts, culture and heritage sphere and the need for and viability of facility expansion if supported by a needs assessment / Cultural Master Plan	<ul style="list-style-type: none"> • General Manager, Recreation and Leisure Services • General Manager, Corporate Services • Waterloo Community Arts Centre • Community consultation 	\$30,000	City	A clear direction established for the Centre connected to the Arts, Culture and Heritage Master Plan
.3 King Street Public Square (Pg 7-18)	A 2009	The Waterloo Public Square is moving into an operational spectrum. Several initiatives are identified in terms of its use, trail linkages and connecting to the Master Plan's Festivals and Events recommendations	To establish operational relationships and trail linkages for the Public Square	<ul style="list-style-type: none"> • General Manager, Recreation and Leisure Services • Other Departments as appropriate 	N/A	N/A	Within three years, a minimum of twelve events per season

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.4 Elam Martin Farm (Pg 7-20)	B-C Post-2014	The Elam Martin Farm is a City owned heritage resource that needs a long-term governance and interpretation strategy considering the site is occupied and no long term positioning has been established	To establish an outcome / direction for the Elam Martin Farm over the longer term	<ul style="list-style-type: none"> • General Manager, Recreation and Leisure Services • Other Departments as appropriate • Heritage group representatives 	To be determined based on direction	To be determined based on direction	Establishment of a long-term direction
.5 Web Portal for Arts, Culture and Heritage (Pg 7-21)	A 2010	Targeted to keep cultural, arts, and heritage groups and service participants informed. This initiative should be integrated with the Department's and the City's overall electronic communication development initiatives and strategies	To develop an electronic communication resource to better inform and engage all residents interested in arts, culture and heritage as part of the ongoing development and sustainability of these community service areas.	<ul style="list-style-type: none"> • General Manager, Recreation and Leisure Services • Other Departments as appropriate • Arts, Culture and Heritage sector representatives 	Within current plans and resources	Within current plans and resources	A focused electronic arts, culture and heritage information sharing resource is established

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Master Plan Recommendations	Priority / Year Completed	Description / Target Audience	Rationale	Responsible Party / Partners	Estimated Capital Cost	Source of Capital Funding	Performance Measure
6.0 Festivals and Events Benefits, Delivery and Municipal Support (Pg 8-6, 8-7, 8-8)	A 2009 to 2011	<p>A series of policy and development initiatives are required to establish and direct the City's involvement in Festivals and Events.</p> <p>The strategy will need to be coordinated with the Department reorganization and repositioning initiatives, with the Partnership and Investment Fund, and the Public Square recommendations within the Master Plan</p>	To develop a policy foundation and strategy to define and direct City involvement in Festivals and Events	<ul style="list-style-type: none"> • General Manager, Recreation and Leisure Services • Other Departments as appropriate • Festival and event organizations 	N/A	N/A	<ul style="list-style-type: none"> • Festivals and events economic impact increased by 10% over the level of inflation within three years • Range of festivals and events expanded to cover more areas of interest / themes

9.5 Fundraising

The Master Plan identifies important community and user group fundraising targets for selected facility initiatives. The ability to fundraise and achieve capital campaign goals will be a primary determinant in terms of which projects may actually proceed and their timing. The need to coordinate the capital fundraising campaigns, set priorities and to ensure their ongoing support and success will be a key skill and capacity requirement that may need to be further developed at the community level for certain initiatives. The City will have some role in supporting the timing and related considerations for these campaigns, however, the leadership, direction and ownership of these campaigns rests with the community.

9.6 Operating Cost Impacts

The net operating cost impacts of the recommendations within the Master Plan are challenging to identify at this time for several reasons:

- The large number of recommendations that are associated only with policies and strategies that need to be developed first;
- The unknown net financial outcomes of the Department of Recreation and Leisure Services reorganization and repositioning that may create some financial resources that could be reapplied in support of a number of the recommendations;
- Partnerships and joint venture arrangements that may emerge and that may share costs;
- A number of recommendations are not anticipated to incur operating costs.

The areas where operating cost impacts are identified would be:

- The winter maintenance of all or selected community trails which will depend on whether this initiative is undertaken within existing resources or requires a separate capacity;
- Increased trail maintenance as trails are extended and gaps are filled which is already part of the ongoing fiscal planning for the City as trail expansion has been ongoing for a number of years and continues to be planned for within the City's long-term capital budget and Official Plan;

- Sportsfield maintenance, whose operating costs impacts would be dependent on whether artificial turf is utilized and field intensification increases or other strategies are employed beyond simply adding new fields which will have incremental cost increases;
- Operational funding for the Public Square and festivals and events animation, marketing and other supports as will emerge from the Department reorganization and repositioning;
- Increased annualized costs associated with the Community Partnership and Investment Fund, which is proposed to grow \$100,000 a year for five years in order to better position the City to support a repositioning strategy to focus more as community development and capacity building with reduced emphasis on direct services delivery;
- The net income opportunities that may occur as a result of a new User Fee Policy and if surcharges were to be considered;
- Operating costs for a skateboard plaza which will be self-operating from a programming perspective, but will require maintenance, and for the splash pads.

Operating cost impacts will emerge on a recommendation by recommendation basis and will need to be an important part of all the business plans and feasibility assessments that will evolve, ranging from the Department reorganization, through to the Cultural Services Master Plan, to the development of the new parks, open space and trails initiatives. The overall operating cost impacts of the Master Plan are not seen as being significant constraints to the Master Plan's implementation, but need to be effectively assessed and positioned within the fiscal capacities of the City, balanced with the importance of continuing to invest in and annually support a broad array of recreation and leisure opportunities that supports the diversity of resident interests, goals and aspirations.

9.7 Master Plan Review

The following Recreation and Leisure Services Master Plan review process is proposed:

Recommendation: Master Plan Review Process

- **Every year, the Plan should be updated in terms of Table 9-1 in order to keep an active list of recommendations before the community, staff and Council;**
- **Every three years, planning sessions / workshops should be held to undertake a comprehensive review of the recommendations related to changes in the operating environment, emerging strategic trends, municipal financial strategies and priorities and the progress being made and the impact of the changes undertaken;**
- **At the ten year anniversary, there should be a major review undertaken to assess whether the long-term dimensions of the Master Plan remain linked to the key trends and rationales or whether other considerations have emerged that result in a need to recast the Master Plan to reflect the perspectives and trends of that time period and onward thereafter.**

The first intent of this review program is to ensure the Master Plan remains relevant in a changing operating environment over the near term timeframe, ten years. The longer term review processes are designed to position the Master Plan as an ongoing policy and strategy foundation for the City. This approach is intended to move away from the historical context of Master Plans being one time projects undertaken every fifteen to twenty years, to being a continuously evolving and more dynamic service planning and development resource.

APPENDIX I

FESTIVALS & EVENTS DEVELOPMENT

APPENDIX I

1.0 Benefits of Festivals and Events

Events have the potential to deliver a number of benefits to the organizers and the host community, including:

- Celebrating culture and heritage
- Encouraging active participation in selected activities
- Providing a showcase for local athletes, performers and artists
- Building civic pride
- Creating greater awareness of the community or hosting organization
- Generating economic benefits for communities, local business and other stakeholders

As tourism infrastructure and attractions become increasingly homogeneous, culture and heritage are gaining importance as a means of market differentiation. And while it can take years or even decades to develop a major tourism or cultural facility, festivals and events can enter the market relatively quickly. For this reason, festivals and major events are becoming a prominent element of many tourism strategies.

The ability to attract and retain workers in the creative and knowledge sectors has led to a greater emphasis on quality of life and quality of place within urban and economic development strategies. Festivals and events can make a significant contribution to the quality of life in the community, and are becoming a more common element of economic development strategies.

One of the more noteworthy studies on the economic impact of festivals and events was published in 2003 by the Trillium Foundation in conjunction with the Ontario Arts Council and the Ontario Cultural Attractions Fund, major supporters of Ontario events through their various grant programs. This study examined the net economic impact of ninety-seven festivals and events of varying size held in Ontario during 2002. The sample for this study included twenty-one large events (over 20,000 attendance), thirty-seven medium events and thirty-nine small events. The key findings are summarized in the following charts (statistics are average per event).

	Small Events	Medium Events	Large Events
Sample Size	39	37	21
Average Attendance	< 10,000	10,000 – 20,000	> 20,000
Total expenditures	< \$75,000	\$75,000 - \$300,000	> \$300,000
Average Gross Domestic Product Impact	\$331,000	\$743,000	\$1.82 million
Federal Taxes	\$64,000	\$141,000	\$343,000
Provincial Taxes	\$51,000	\$114,000	\$271,000
Municipal Taxes	\$18,000	\$41,000	\$100,000
Wages & Salaries	\$218,000	\$492,000	\$1.21 million
Employment (FTE)	11	24	60

Of the \$79 million in GDP and \$51 million in wages generated by these 97 events, the sectors most affected were Recreation (\$11.7 million GDP, \$9.8 million wages), Accommodation (\$8.8 million GDP, \$6.7 million wages) and Foodservice (\$7.1 million GDP, \$5.7 million wages).

Festivals and events with attendance less than 10,000 drew 90% of their visitors from the local community and the balance from the rest of Ontario. Festivals and events with attendance from 10,000 to 20,000 attracted 75% of their visitors from the local community, 20% from the rest of Ontario and 5% from outside the province. Festivals and events with attendance over 20,000 attracted 50% of their visitors from the local community, 40% from other Ontario communities and 10% from outside the province.

The economic impact of festivals and events receives a great deal of attention, particularly for major events requiring a significant investment in public funds. However, the impacts – both positive and negative - can extend far beyond what is measured in conventional economic impact studies. Properly planned and managed, festivals and events can provide the host community and the organizers with significant social and environmental benefits. These qualitative impacts, while more difficult to measure, can be as important as the direct economic returns.

2.0 Strategic Context

Although festivals and events are not specifically referenced in the City's Strategic Plan 2007-2010, there are a number of Strategic Imperatives identified in the Strategic Plan that could be supported by well managed and sustainable events. These include:

Key Area	Strategic Imperative
Healthy & Safe Community	Create an inclusive community by embracing diversity.
	Promote recreation and culture opportunities for all by constructing and programming the Public Square.
Economic Vitality	Become the location of choice for innovative and growing businesses by ensuring strong and effective partnerships with business associations; supporting a vibrant Uptown core; and, supporting and promoting cultural activities.
	Position Waterloo as an internationally recognized community by implementing a tourism strategy and destination marketing.
Commitment to Excellence	Focus on effective community engagement by supporting community organizations as they strive to achieve excellence.
Partnerships and Collaboration	Leverage community assets by pursuing partnerships with all sectors in our community.

While festivals and events could play a role in the key areas and strategic imperatives outlined above, it is not clear how festivals and events fit into the Corporate Strategic Plan, and what specific role(s) have been articulated for festivals and events within municipal departments. Are they viewed as an economic development initiative to strengthen the downtown core and assist in attracting knowledge workers? Are they intended to promote diversity, enhance culture or celebrate heritage? What priority should be attached to festivals and events by other municipal departments providing support services, such as Public Works? The completion of the Recreation and Leisure Services Master Plan, as well as the ongoing tourism marketing strategy being developed by the new regional destination marketing organization, should help to clarify expectations with respect to festivals and events.

3.0 Overview of Festival and Event Activity

Like most cities of comparable size, the City of Waterloo offers a range of events that cover the spectrum from small community-based festivals to major regional and national cultural, heritage and sport events. These are delivered through a combination of models, including direct delivery of selected events by the municipality, third party delivery by a wide range of stakeholders, and some collaborative efforts involving both municipal and third party stakeholders. Some of the more noteworthy events are outlined in the following table:

Event	Date	Comments
Uptown Waterloo Ice Dogs Festival	February 16, 2008	Regina Street parking lot adjacent to City Centre. Produced by City of Waterloo in partnership with UpTown BIA. Estimated attendance 1,500
Uptown Country Music Festival	June 21, 2008	Produced by UpTown BIA in conjunction with City of Waterloo. Celebrating its 6th anniversary in 2008. Staged in the Regina Street parking lot adjacent to City Centre. Estimated attendance 5,000.
Canada Day Celebrations	July 1, 2008	Staged by the University of Waterloo at the Columbia Lake Fields. Includes live entertainment, family activities and fireworks. Estimated attendance 50,000.
Uptown Waterloo Jazz Festival	July 10 – 13, 2008	Celebrating its 16th year in 2008. Free outdoor performances. Organized by volunteer board; event production and delivery coordinated by UpTown BIA. Estimated attendance 20,000.
Afro Festival	July 26, 2008	Showcases African food, art, music and story telling. Stage at Waterloo Park. Presented by the African Women’s Alliance of Waterloo Region. Estimated attendance 3,000
Waterloo Busker Carnival	August 21 – 24, 2008	Staged on King Street between William and Erb. Celebrating its 20th anniversary in 2008. Managed by volunteer Board with dedicated municipal staff for event production and operations. Estimated attendance 35,000.
Royal Medieval Faire	September 20, 2008	Celebrating its 11th year in 2008. Staged in Waterloo Park, this event features re-enactments, live entertainment, interactive events and vendors. Estimated attendance 5,000 – 6,000.
Kitchener Waterloo Oktoberfest	October 10 – 18, 2008	Largest Oktoberfest held outside of Germany. Recognized as one of Ontario’s “Top 100 Festivals”. Staged in various locations and major halls throughout Waterloo and Kitchener.
Wonders of Winter	November 29 – Jan 4	Festival of Lights, celebrating its 14th year in 2008. Staged at Waterloo Park. Organized and presented by major service clubs in Waterloo. Estimated attendance 50,000.

In addition to these cultural and heritage events, the City has a long history of hosting major regional, national and international sporting events. These events include recurring annual

competitions such as the K-W Oktoberfest Atom International Minor Hockey Tournament and the Waterloo Memorial Tournament, rotating regional events hosted by groups such as K-W Water Polo Club, and provincial and national university sport championships.

4.0 Event Hosting Facilities

Festivals and events can be staged in a wide variety of venues, which allows this type of activity to develop rapidly and cost effectively when compared to activities requiring specialized venues such as convention centres or performing arts centres. This is one reason that festivals and events have become an increasingly common element of municipal economic and cultural development strategies.

The principal festival and event venues are outlined below.

Waterloo Park

Waterloo Park is the city's premier urban outdoor venue, with tremendous potential for additional festival and event staging. With over 100 acres of greenspace, recreation facilities, sports fields and other amenities, and with an outstanding location proximate to other cultural amenities and institutions, Waterloo Park represents a unique asset few municipalities can match.

Waterloo Memorial Recreation Complex

This facility opened in 1993 and features the Clarica Arena with 3,400 seats and approximately 1,000 additional standing room capacity. It also houses the Swimplex, a multi-purpose aquatic facility featuring a 30 metre pool, one metre and three metre springboards and five metre diving tower, and gallery seating for 300.

RIM Park

RIM Park is the City of Waterloo's 500-acre park and recreation facility. With eighteen outdoor sports fields, Manulife Financial Sportsplex and Healthy Living Centre, trails, parkland, and Grey Silo Golf Course, RIM Park is one of the largest comprehensive sports and recreational venues in Canada.

The Manulife Financial Sportsplex and Healthy Living Centre opened in 2001 and includes a four pad ice complex, indoor soccer and gymnasium.

In addition to these major public assembly spaces, a number of other municipal facilities provide some capacity for festival and event hosting. These include the Albert McCormick Community Centre (twin pad), Moses Springer Community Centre (single pad), and Bechtel Park (five soccer fields, Manulife Financial Soccer and Sports Complex).

University Venues

Both Wilfrid Laurier University and the University of Waterloo have venues and facilities for arts and culture, sport and community events. The University of Waterloo's Canada Day Celebrations occur on the Columbia Field. The University of Waterloo also has an arena, indoor pool, field house and the Humanities Theatre along with many other indoor and outdoor spaces. Wilfrid Laurier has a fifty metre indoor pool, field house and related facilities. The two universities also support a major stadium complex with track and field capabilities.

Urban Infrastructure

A number of the city's more popular events are staged in the central business district. Surface parking lots adjacent to the City Centre are used for the UpTown Waterloo Jazz Festival and the UpTown Country Music Festival, while the Waterloo Busker Carnival is staged on King Street in the city's principal urban retail district.

The Station Lot (Regina south of Erb), Regina Lot (Regina south of rail corridor) and City Centre Lot (William Street East adjacent to City Centre) represent a unique and valuable asset for staging urban events. Collectively, they provide almost three acres of paved surface area plus the greenspace linking the Regina and City Centre lots. Additional public and private parking is available nearby in the downtown core, and the proximity of the Waterloo Memorial Recreation Complex provides an option for shuttle bus service if required.

While some merchants will argue that parking capacity is limited and should not be diminished for any reason, the "live, work and play" form of urban intensification that sustains a vital urban core usually requires a new approach to transportation.

Public Square

A new Public Square is under development on King Street, to serve as a focal point for downtown activity. It will support a wide range of festival, celebration, performance, civic and other activities that will draw small and large audiences to Waterloo and to the downtown area. It represents one initiative in the comprehensive renewal of Waterloo's central business area. The facility is under development but the programmatic and operational plans are still under consideration.

APPENDIX II

YONGE-DUNDAS SQUARE OPERATING FINANCIAL PROFILE

APPENDIX II YONGE-DUNDAS SQUARE

Background

Yonge Dundas Square (“YDS”) is owned by the City of Toronto and governed by a volunteer Board of Management appointed by the City. Its purpose is to attract additional visitation to the area to support existing retail operations, and to attract new retail and entertainment development to the area. The Square commenced operations in January 2003.

As originally conceived, the Square was to be operationally self sufficient, generating sufficient revenues to cover all operating costs including municipal services such as maintenance, snow removal and security. After two years under this model it was apparent that it was very unlikely the Square would ever generate the operating revenue to cover all occupancy and maintenance expenditures. It was also clear that, in an effort to reach the expected level of self sufficiency, the Square was becoming highly commercialized, with adverse consequences for public access.

The business model for the Square has been amended, with the City now absorbing a share of operating costs for the Square. In return, the Management Board turns over any operating profit to the City.

Programming Activity

Yonge Dundas Square is one of the most actively programmed venues in Canada, with an estimated 310 event-days of activity in 2007. This includes 160 event days programmed by YDS or City of Toronto staff and 150 event days generated by community, private or major events.

The significant elements of the annual programming delivered by YDS staff include:

Event	Description	Event-Days
Artisans Market	Friday, Saturday, Sunday and holidays, May 9 – October 26	56
Serenade in the Square	Free lunchtime concert series. Wednesdays from 12:30 to 1:30 May 7 – June 25 and September 17 – October 15.	11
Mondo Musico	Free concert series featuring contemporary world music. Presented by CityTV and Omni Television. Friday evenings from June 27 – September 19.	10
City Cinema	Free film screenings presented by Future Shop. Tuesday evenings from June 24 to August 26.	9

YDS generates total revenue of approximately \$1.2 million, with the City's operating grant representing approximately \$583,000 or 49% of its total revenue. Rental income (Information and ticket kiosks) and signage represent an additional \$188,000 or 16% of total revenue. YDS charges event organizers a permit fee that ranges from \$825 per day in January and February to \$2,500 per day from May through October. A premium is charged on statutory holidays. Registered charities and not for profit organizations receive a discount on permit fees, and permit fees are waived for events sponsored by the City or community events endorsed by a city councillor. Permit fees for venue rental generate approximately \$195,000 or 16% of total revenue. The Artisans Market accounts for 40% of permit fees.

YDS has four full time employees and an annual payroll of approximately \$260,000. The following tables provides a detailed breakdown of 2006 operating revenues and expenses, along with summary estimates for 2007 and the projected summary budget for 2008.

	2006	2007 (est)	2008 (proj)
Revenue			
Corporate Sponsorships & Contributions	\$77,794		
Permit Revenue	\$195,048		
Event Support Revenue	\$138,849		
Food & Beverage Revenue	\$6,165		
Rental Income	\$107,222		
Signage	\$80,500		
Other	\$5,598		
Total Operating Revenue	\$611,176	\$829,200	\$768,000
Expenditures			
Event Support	\$165,294		
Marketing	\$187,716		
Payroll	\$255,426		
Maintenance	\$266,462		
Security	\$157,509		
Administration	\$146,331		
Amortization	\$6,319		
Total Expenditures	\$1,185,057	\$1,383,100	\$1,351,500
Operating Surplus/Deficit	-\$573,881	-\$553,900	-\$583,500
City of Toronto Contribution	\$582,585	\$553,900	\$583,500
Operating Profit	\$8,704	\$0	\$0

As this table shows, YDS spends relatively very little on program content. Content development and delivery is, with the exception of the lunch concert series and the Artisans Market, the responsibility of outside event organizers. However, these financial statements also illustrate the overhead burden required to actively market a public venue to outside event organizers, and to produce and promote a relatively modest schedule of direct-delivery events.

APPENDIX III

TOOL KIT

APPENDIX III EVENT ORGANIZER'S TOOLKIT

Section	Possible Topics
Getting Started	Setting Goals & Objectives – Why Are We Doing This Developing Your Event Concept Market Testing & Feasibility Establishing an Event Organizing Committee Developing the Event Budget Establishing the Critical Path
Site Plan	Picking Your Site Site Plan and Layout Site Services and Equipment
Programming & Animation	Entertainment Options Rides & Amusements Fireworks
Revenue Generation	Potential Revenue Streams Vendor Solicitation and Contracts Bingos, Raffles, Fundraisers Sponsorships Community Partnerships Grants
Event Administration	Options for Incorporation Guidelines for Boards & Committees Financial Control Systems Purchasing & Contract Administration Insurance Requirements Risk Management & Mitigation
Health & Safety	Emergency Management Plan Food Safety Police, Fire & Medical Alcohol Service Training & Certification Requirements Traffic Control Concert Security & Crowd Control On Site Services
Volunteers	How Many Do You Need Where Can You Find Them Recruiting & Screening Techniques Orientation & Training Deployment & Supervision Recognition & Retention

Marketing	Picking Your Target Markets Identifying Marketing & Media Partners Publicity, Public Relations, Media Relations Web Based Marketing Options Traditional Marketing Channels Non-Traditional Marketing Opportunities Partner-Based Promotions
Event Operations	Credentials and Access Site Set Up & Tear Down Plan Staff, Exhibitor/Performer, Visitor & VIP Parking Uniform Requirements Event Suppliers (Fencing, Toilets, Staging, Sound & Lights, Radios, Cell Phone, Tents etc.) Event Operations Headquarters Plan (Location, Staffing, Communication, Security etc.) Weather and Other Contingency Plans
Event Evaluation	What To Measure (Linkage to Goals & Objectives) How To Measure – Options for Visitor and Exhibitor Surveys Conducting the Event Debriefing Session Economic & Community Impact Models

The Toolkit would contain industry best practices, information on municipal venues and resources, local service providers and information and documents required for approvals, grants and compliance. To show how the proposed format would work, the section on Site Plan has been mapped out in the following table to show some of the potential topics or sub-headings:

Section	Best Practices	Municipal Content
Site Plan	Guidelines for site planning: Determining site capacity Traffic flow Parking Visitor Information Services Washrooms Concessions Stages Lost & Found Signage Mitigating site or turf damage	Description of available municipal event venues: RIM Park Waterloo Memorial Recreation Complex Albert McCormick Civic Centre Moses Springer Civic Centre Waterloo Park Link to on-line booking site. Permit requirements (site, electrical, fire, vendor, alcohol, road closure) Listing of local service suppliers (e.g. accommodation, catering, electricians, printing, equipment rentals) Listing of site-related municipal services