

NORFOLK COUNTY MUSEUM SUSTAINABILITY STUDY



FINAL REPORT
December 2021

TCI Management Consultants



Norfolk Museum Sustainability Study – Draft Report

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Executive Summary

Key Findings and Conclusions

Key findings and conclusions from this study that have influenced the recommendations made are as follows:

- the number of museums supported by the County's population is in line with that seen in other comparable municipalities of its size (this is important to note as it counters some perception encountered in the interviews and surveys that the County was especially over-invested in this regard)
- the cost of the museums operation in Norfolk County is not excessive when compared to other single tier municipalities (this also is important to note as it counters perceptions to the contrary encountered in the interviews)
- when compared to other museum operations, earned revenues are low¹ and there could be some scope for improvement in this regard (we note however that museums do not exist to generate a profit and that earned revenues are more an indicator of relevance and use)
- a very strong preference was expressed in the community survey and interview undertake for an 'enhanced status quo' option, where the existing facilities would continue to operate and be improved over time, as opposed to further closures, or opposed one centralized facility
- a proper storage facility for artifact restoration/conservation, research and storage is required – this could be a purpose-built facility or alternatively, leased commercial space (assuming it can meet temperature and humidity standards for artifacts)

Recommendations

1. Enhanced Status Quo Scenario Preferred: After a review of several alternative museum configurations for the County of Norfolk, an enhanced status quo option is recommended. The Archives operation too should remain in situ in Simcoe. The reasons for this are threefold: 1) the community survey revealed that a very large majority of the population consulted (74% of nearly 700 responses²) desired this option and rejected further consolidation or centralization); 2) our review of the financial situation facing Norfolk showed that the County's support of museums was reasonable and in line with comparable single-tier municipalities (in fact, maybe slightly less supportive, if anything); and 3) a high-level review of costs showed that this was likely the least costly option. Note that the recommendation here is for an **enhanced** status quo option, as various physical and other improvements are recommended to each facility to improve sustainability.

¹ Same source as above.

² Actual total was 669.

2. Collections and Curatorial Facility Needed: A collections and curatorial facility is also needed as a proper storage facility for artifacts as well as a small conservation and preparation lab. The collections at the Teeterville Pioneer Museum and Eva Brook Donly Museums should be transferred and safely stored in a proper facility of this type. Future expected growth of the collection should also be a consideration. A possible location for this collections and curatorial facility could be at the Delhi Tobacco Museum & Heritage Centre. Alternatively, rented commercial space could also be considered, or a purpose-built facility.

3. Investigate Redevelopment Potential at Waterford Heritage and Agricultural Museum: The land on which the Waterford Heritage and Agricultural Museum is currently located appears to have significant development potential. Accordingly, one option would be for the County to explore the possibility of a development on the site where part of the arrangement would be to redevelop a new museum on the first floor, or to free up the site and develop a new agricultural museum elsewhere in Waterford. It is recommended that the County investigate the potential for such a development in greater detail over the coming year.

4. Recommended Enhancements to Waterford Heritage and Agricultural Museum: If a development partnership such as envisaged in the previous recommendation is not possible, then it is recommended that a refurbishment plan for Waterford be implemented (further details of this are contained in the Report)

5. Recommended Enhancements to Port Dover Harbour Museum: The Port Dover Harbour Museum is a unique expression of the Norfolk museum system. It has the highest overall attendance and is arguably the strongest tourist attractor and economic generator of all the museums (as a result of its location in a highly populated tourist area in the summer months). As with the Waterford Agricultural Museum, there are a variety of improvements recommended as part of a refurbishment package for the Museum, including improved exhibits and greater accessibility.

6. Reposition Delhi Tobacco Museum & Heritage Centre: The Delhi Tobacco & Heritage Centre Museum sees the lowest levels of attendance and appears to be the least popular of the County's attractions. In part, this is because of the current disenchantment with the tobacco industry (even though this was a legitimate part of the history of the County and is a story that needs to be told). It is recommended that the museum be downsized (freeing up storage space for collections; see next recommendation) and rebranded to emphasize the multicultural history of the County (a story that would include, but not excessively celebrate, the tobacco history).

7. Expansion of the Norfolk County Archives: We understand that the volume of materials at the Archives is growing and that this is expected to continue. Accordingly, it is recommended that once most of the artifacts are removed from the Eva Brook Donly museum (and placed into proper storage) the Archives develop a plan to expand into the space freed up. It is recommended that a small-scale exhibit devoted to EBD be developed (perhaps in a room in the house) so that there is some authentic presence remaining.

8. Update Collections Policies: The collections policies of the three museums (as well as that of the Archives) are in need of updating to ensure consistency and currency. Once done, the collections themselves need to be reviewed to ensure that they are in keeping with the updated policies, with duplicate or no longer relevant items being de-accessioned or eliminated. Ideally there would be one collections policy for the County; this may be an ideal that the County strives toward over time.

9. Rebranding of Norfolk County Museums: Each museum has a robust individual identity that is strongly associated with the communities in which they are located. The fact that they are all museums of Norfolk County may be lost on the visitor, especially tourists. It is recommended that a strong secondary tag line of *'The Museums of Norfolk County'* be adopted, and that the underlying philosophy be 'one museum in three locations'.

10. Engaging and Informative Web Site: One of the common themes heard in the interviews and to some extent the community survey was that there is no one place where the entire story of Norfolk County can be seen. It is recommended that the County museum web site be expanded to contain more of this type of information. This would also act in some way as a marketing vehicle to further promote the museums and build awareness and interest.

11. More Active Communications: As the museums open up post-Covid, it is recommended that an active communications plan be developed, with a strong social media and e-blast newsletter continuing (a monthly communication was initiated during the course of this work). This of course is already occurring on an occasional basis but should continue on a more regular timetable.

12. Focus on External Rental Revenue Generation: One of the benefits of the refurbishment of the three museum facilities is that they will become more attractive from the perspective of renting the facilities for special events, possibly corporate functions, etc. Once the recommended improvements have been made a more aggressive rentals policy should be pursued.

13. Review Admission Fees: The County should review admission fees (once museum visits again become possible) to determine the appropriate range and level of pricing. One strategy could be to explore whether admission to the museums might be made possible through a grant or donation made by a local organization or business. (The positive goodwill generated through a *"free museum admission made possible through a grant by x"* type of promotion could be very attractive to the right business or organization.)

14. Develop School Curriculum Guide: A curriculum guide should be developed/updated for local (and regional) school boards to use. The underlying purpose of this guide would be to demonstrate how the history of Norfolk County connects to the overall school curriculum outline, and thus to the broader world. Insofar as school group usage is a key metric showing relevance and utility for the museums, this should be a priority.

15. Consider Fundraising Strategy: The improvements suggested for the various facilities are fairly modest in scale. If the County feels it cannot fund the necessary improvements on its own, then the feasibility of a fundraising strategy should be explored.

16. Engaging Programming: Also, as the museums open up after Covid, the types of programs and events offered at the museums will pick up as well, approaching the full suite of activities as was being offered before the pandemic. When returning to these activities, the museums should consider engaging the community in perhaps more challenging topics as well, such as Indigenous issues, de-colonizing initiatives, the involvement of BIPOC and other marginalized persons in the life of the County, etc. The experience of other community museums has shown that they are increasingly expected to bring these sorts of issues to the community, and can be thought leaders in this regard.

17. Partnership Development: Partnerships are not only a means of obtaining resources for projects of mutual benefit but they are also a measure of community interest and involvement. Partnerships with solid local organizations and businesses demonstrate relevance and credibility. The museums should explore the development of a wide range of partnerships throughout the County.

18. Consider Additional Staffing: When the Norfolk County museums are able to recover and restore levels of engagement experienced prior to the pandemic, there may be a need to assess staffing levels to ensure that adequate support is in place to continue the momentum required to evolve and grow.

19. Establishment / Reinstatement of Community Advisory Boards: Local advisory boards should be reinstated for each of the three museums. The CABs would have a dual role: 1) on the one hand to advise the County on the kinds of programs and events that would have traction with local communities and the wider County (or to act as a sounding board for such ideas from Heritage and Culture staff) and 2) to act as local ambassadors for the museums, to encourage attendance and volunteerism. The role of these CABs should be specified through a simple MOU and should be appointed by Council. It should be clear that these organizations would not have a governance role but rather a purely advisory function.

A. Background and Context

A.1. Brief History and Current Context of the Museums in Norfolk County

The background to this project was very well summarized in the Terms of Reference for the project, and is repeated here:

“Norfolk County is a municipality of 64,044 located on the north shore of Lake Erie in southwestern Ontario. Situated between Elgin County and Haldimand County, Norfolk County is largely rural and is a restructured (2001) single-tier municipality consisting of a number of smaller communities including the former Townships of Norfolk and Delhi, Town of Simcoe, and part of the former City of Nanticoke.

At the time of the 2001 municipal amalgamation in Ontario, Norfolk County was established as a single tier municipality. Prior to amalgamation, robust community consultation took place to receive public input on a go forward strategy for heritage and culture within the County.

The result of this consultation established that each of the existing museums were important to their respective community and as such, Norfolk County assumed the ownership and operations of the Delhi Tobacco Museum & Heritage Centre (1979), the Port Dover Harbour Museum (1978), the Teeterville Pioneer Museum (1967) and the Waterford Heritage & Agricultural Museum (1980). The information within the brackets indicates the year each site was established.

The Eva Brook Donly Museum, located in Simcoe and operated by the Norfolk Historical Society (NHS) was also included in this community consultation. At the time, the NHS operated the museum in a building owned by the municipality. The NHS decided against transferring ownership and operations to the County at the time of amalgamation. However, in 2018, the NHS transferred ownership of their collection and operations to Norfolk County.

In 2002, the Lynnwood Arts Centre (LAC), an independent charitable organization transferred ownership of their property to Norfolk County while the LAC continued to pay for operational costs. A year later in 2003, LAC transferred ownership of the art collection and operations to Norfolk County.

During 2020 budget deliberations, Norfolk County permanently closed the Teeterville Pioneer Museum, the Eva Brook Donly Museum and the Norfolk Arts Centre; leaving the Delhi Tobacco Museum & Heritage Centre, the Norfolk County Archives, the Port Dover Harbour Museum and the Waterford Heritage & Agricultural Museum operational. All remaining sites are temporarily closed due to the global pandemic.

Norfolk County has established as a priority, financial sustainability for the municipality. The purpose of this review is to develop a strategic plan for the future operation and sustainability of Norfolk County museums and archives. This investment strategy could include recommendations of how to integrate them into broader community development and programming.”

A.2. Purpose of the Museum Sustainability Study

This project is described as a ‘museum sustainability study’. Its purpose is to examine ways that the municipality can continue to operate a fiscally responsible museum program going forward. Early on, it was determined that a number of scenarios should be examined, including maintain (and improving) the status quo, closing one or two of the museums and consolidating elsewhere; and all the way to having one central museum facility for the entire County and closing the smaller community museums. Outright closure of all the museums was not contemplated.

The project was to involve extensive consultation with municipal staff, key stakeholders, and the general public. Specific deliverables were to include:

Component of the Analysis	Requirement as Stated in Terms of Reference
1. Facility analysis	a) Review each site and determine benefits and challenges of each.
2. Operational analysis	a) Review of the operational framework of existing museums and archives. b) Determine how operations compare to current best practices.
3. Revenue analysis	a) Review revenue streams and compare to current best practices. b) Identify new or different revenue streams.
4. Demand analysis	a) Review performance measures to determine who is visiting Norfolk County's museum and archives. b) Determine the demand drivers. c) Compare demand profile to current cultural sector trends.
5. Collection analysis	a) Review size, scope and appropriateness of the museum collection. This is not intended to be a detailed review but rather a high level review of the collection. b) Review policies and practices related to the collection.

The end deliverable is to be a plan for the sustainable operation of the museum, that continues to provide for the needs of County residents, but does so in a way that is financially responsible. No one expects museums to make a profit, but they should operate in a way that is fiscally responsible and demonstrates to the overall community the benefits that they generate (in terms of attendance, program participation, exhibits and events provided for residents and visitors, economic impact, partnerships developed, etc.). This return-on-investment orientation lies at the heart of the sustainability plan to be developed here.

A.3. Activities Undertaken

A number of activities were undertaken in the development of this plan. These included:

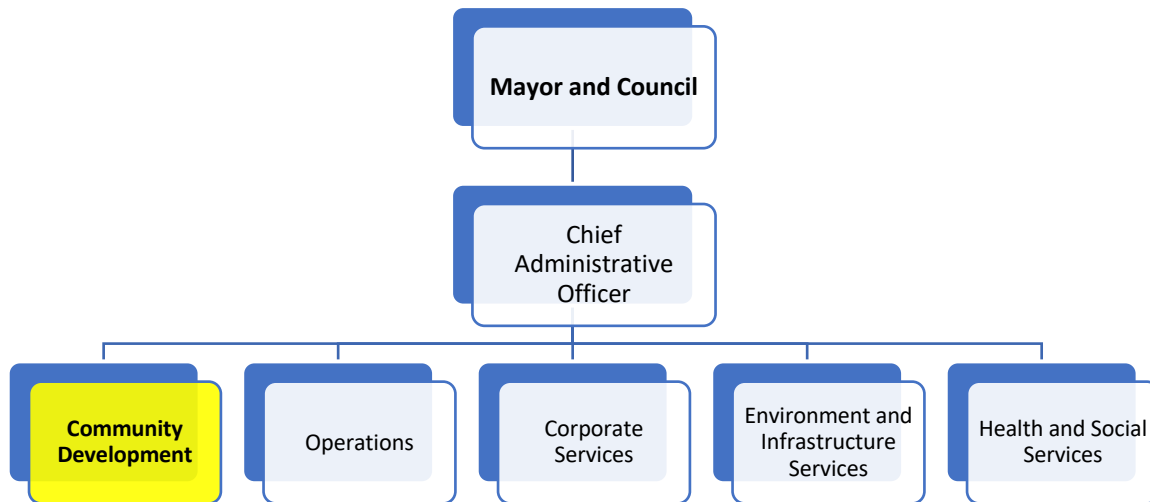
- a site tour of existing museum facilities (including those that have been closed, and selected other potential facilities that could be used as alternative locations for a museum operation)
- interview with key stakeholders throughout the County
- a detailed questionnaire for staff and volunteers at the museums (which generated on the order of 50 responses)
- a community survey (which generated an excellent return of nearly 700 responses)

- a detailed benchmarking review of the provision of museum and cultural services in other comparable communities
- several project team meeting sessions throughout the project

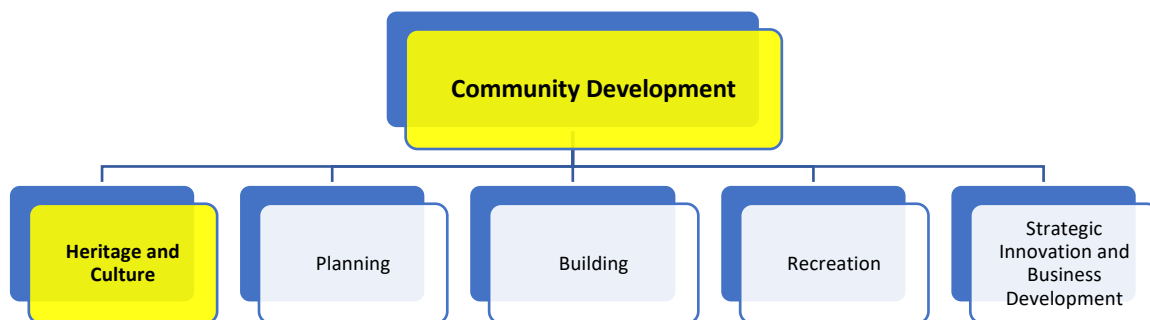
A.4. Overview of Current Operation

Organization and Staffing Structure

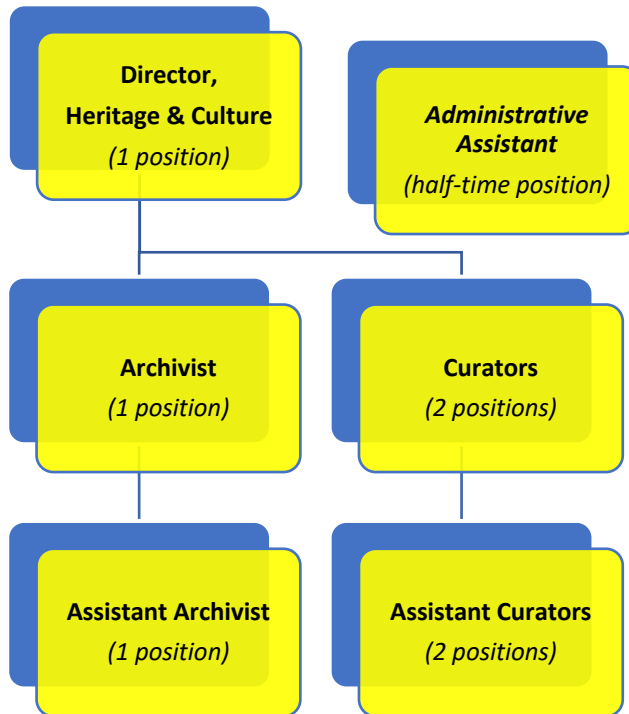
The museums and archives operation in Norfolk County is run by the Heritage and Culture Department of the Development and Cultural Services Division, as shown in the diagram below: The overall administrative structure of the County is as shown below.



‘Community Development’ in turn consists of five Departments, one of which is ‘Heritage and Culture’.



Finally, the structure of the Heritage and Culture Department is as shown below:



As shown above, the staffing complement for the Division in 2021 was 7.5 full-time equivalents (FTEs). (By way of comparison, the staffing complement in 2019 was 13.3 FTEs, which provides an indication of the extent of cutbacks in 2020 and 2021.)

Programs and Services

In 2020 and the early part of 2021 the facilities were closed to on-site visits, and programs and activities were of course closed down due to the pandemic. However in 2019, prior to the pandemic, many imaginative and innovative programs and activities were offered:

Facility	Events and Exhibits	Youth Programs and Day Camps
Port Dover Harbour Museum	<ul style="list-style-type: none"> - New Year's Levee & Fiddle Party - Museum Month special presentations: <ul style="list-style-type: none"> - <i>Bars, Booze, Bootleggers and Blind Pigs</i> - <i>The Voyage of Dollier de Casson</i> - Annual Fun Car Rally - Concerts: <ul style="list-style-type: none"> - <i>Mushy Peez concert</i> - <i>Three in the Round</i> - <i>Jubilee Brass Band</i> - Norfolk Sights (photography exhibit) - Basking in a Golden Glow (100 seasons of the Arbour) 	<ul style="list-style-type: none"> - Sand, Suns and 50s Fun week - Hit the Deck! Week - Escape from the Island week - Sea monsters of Lake Erie week

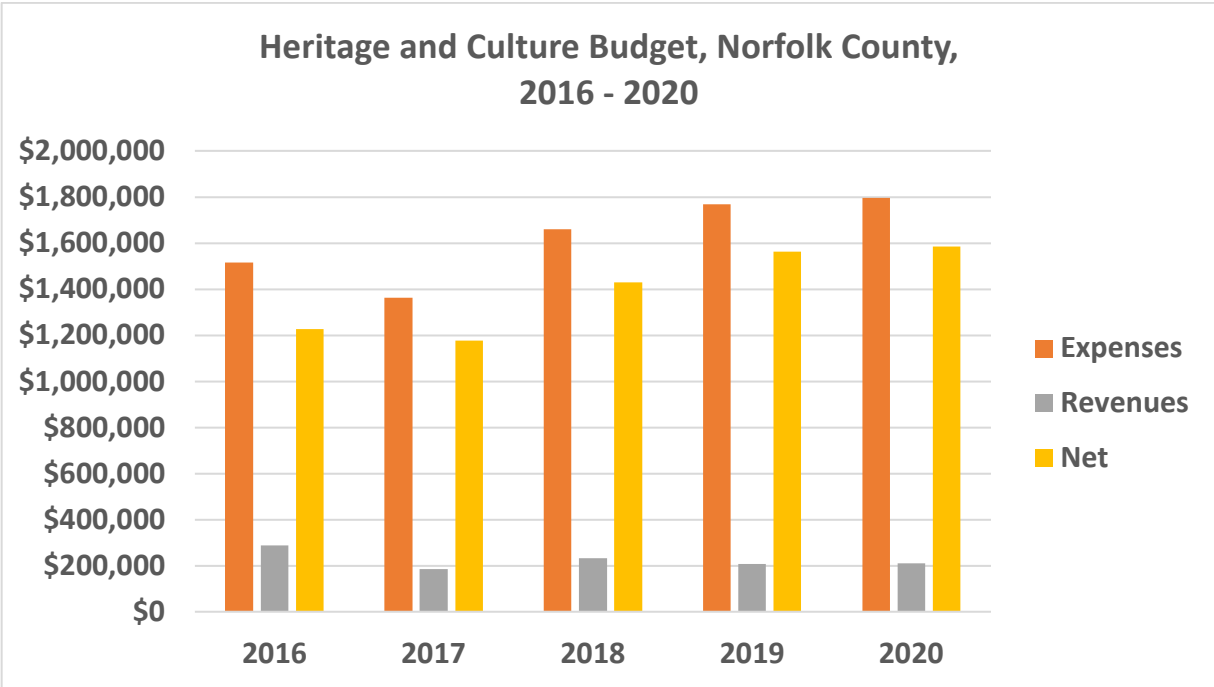
Waterford Heritage & Agricultural Museum	<ul style="list-style-type: none"> - Moonlight & Mayhem Walking Tour - Mummy Unwrapping - Pop Up Holiday Sale - Red Cross Quilts exhibit - Tornado of '79 exhibits - Agricultural Hall of Fame Induction Gala - Easter Eggstravaganza - Alice (exhibit about Alice Trusdale, WW1 nurse) - Encaustic Art Workshop (beeswax) - various Pop-Up exhibits 	<ul style="list-style-type: none"> - PA Day Programs - March Break Camp - Around the World week - Fun with Food week - WHAM Olympics - Time Travelers week - Fun in the Sun week - Artistic Creations week - Neverland and Beyond week - Animal Planet week - Night at the Museum - Youth Volunteer and Mentorship program
Delhi Tobacco Museum and Heritage Centre	<ul style="list-style-type: none"> - 40th year special exhibit and concert - Anniversary Open House - Belgian Bobbins, Lace and Brews Workshop - Csigá Noodle Bee - Streetscape Yard Sale - Girls Night Out - Traditional Turkey Dinner - Annual Christmas Penny Sale - Bus tour to St. Lawrence Market - Pysanky Ukrainian Egg Decorating - Recipes from the Tobacco Farm 	<ul style="list-style-type: none"> - March Break program - PA Day Camps - Crazy Creatures week - Colour Me Crazy week - Down on the Farm week - Culinary Chaos week - Get in the Game week - Passport to Fun week - The Science of Summer week - Night at the Museum (sleepover_
Eva Brook Donly Museum and Archives	<ul style="list-style-type: none"> - Interactive history show - Tea tasting and Chocolate Pairing - Robin's Redemption interactive escape room - Time for Tea Exhibit 	<ul style="list-style-type: none"> - Youth Volunteer and Mentorship program - Art at the Museum week - Time Travelers week
Teeterville Pioneer Museum	<ul style="list-style-type: none"> - Music and Moonshine - Quilts in the Village - Vintage Tractor Drive - Pioneer Projects 	
Norfolk Arts Centre	<ul style="list-style-type: none"> - Soup Art Bowl event 	

Budget

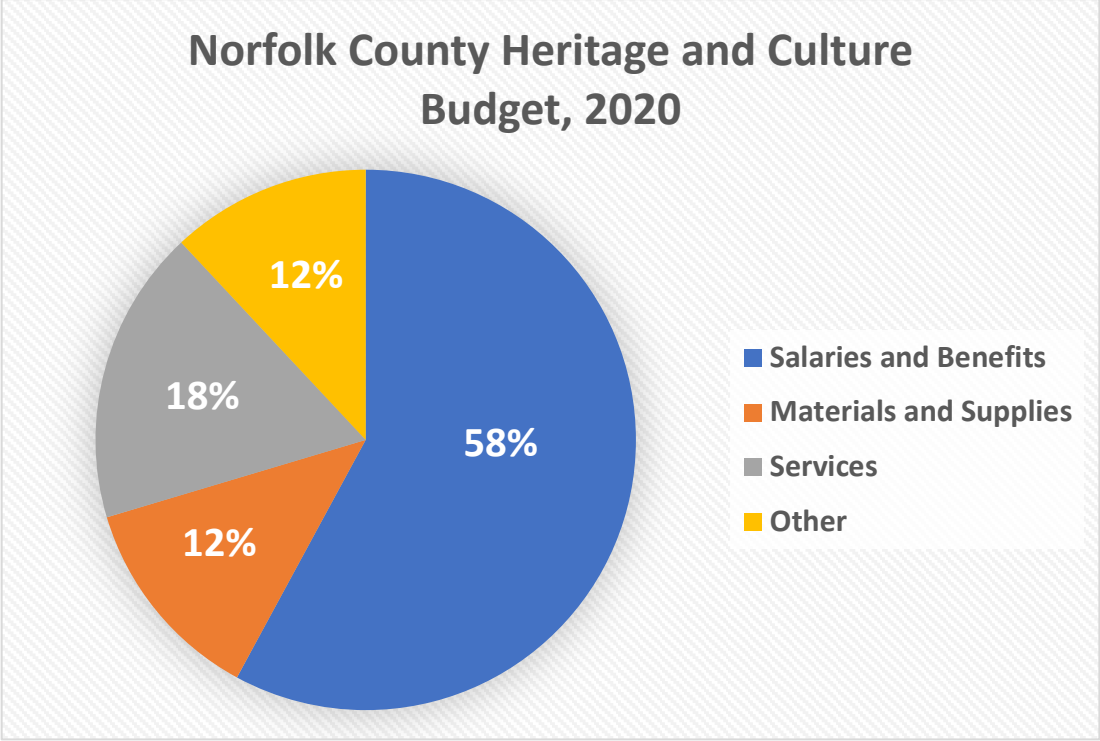
The budget for the department in 2020 was approximately \$1.8 million. With revenues of approximately \$211,000 this implies a net expenditure of approximately \$1.6 million on the part of the County. This represented approximately 1.5% of the entire County operating budget in 2020³.

This budget amount has been growing slowly over the 2016 – 2020 period:

³ Total net levy requirement of \$102.8 million.



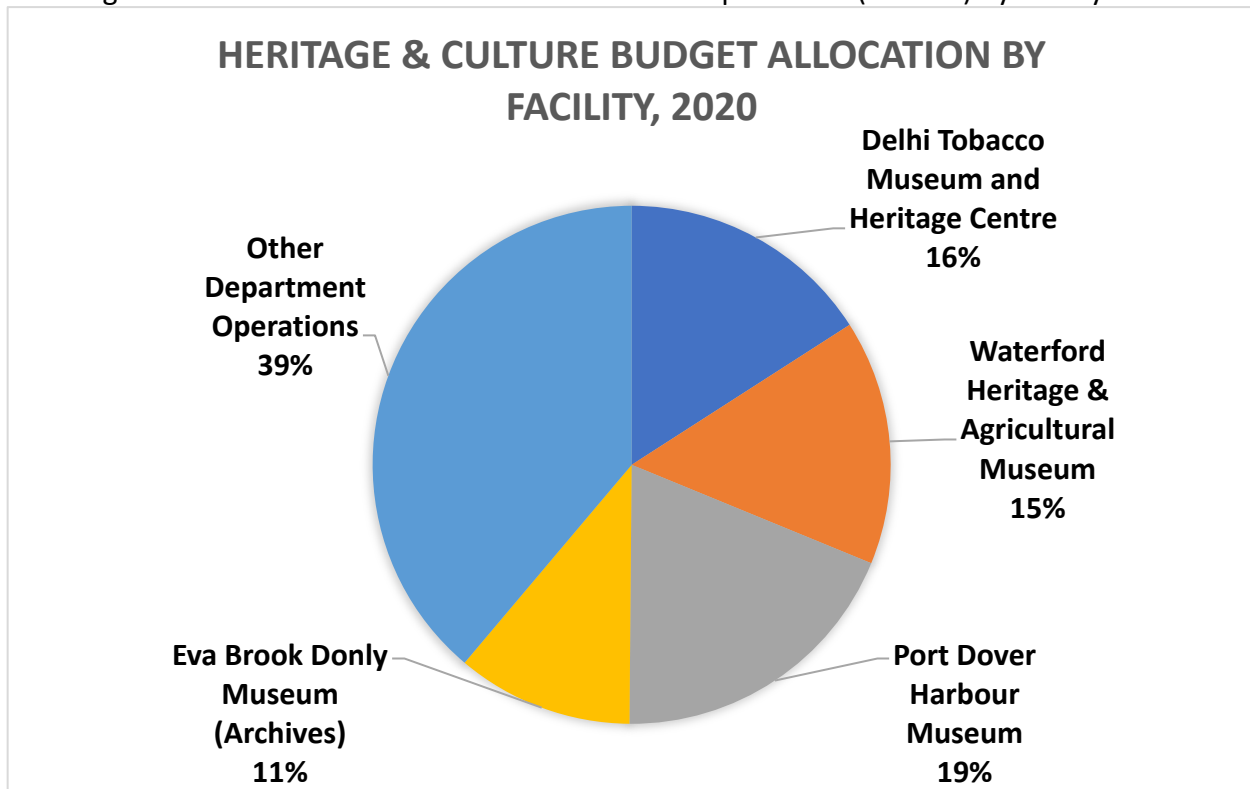
As with almost any museum operation anywhere, staffing is the largest single component of operating cost, as is evident in the chart below, showing the 2020 distribution of expenses by cost category:



'Staffing' is a somewhat larger cost element for Heritage and Culture in Norfolk County than is the norm seen in heritage institutions across Canada, where on average 43% of total costs are

represented by staffing⁴ (based on 2017 data, but the overall percentages are not judged to have changed materially since then).

The diagram below shows the overall distribution of expenditure (in 2020) by facility.



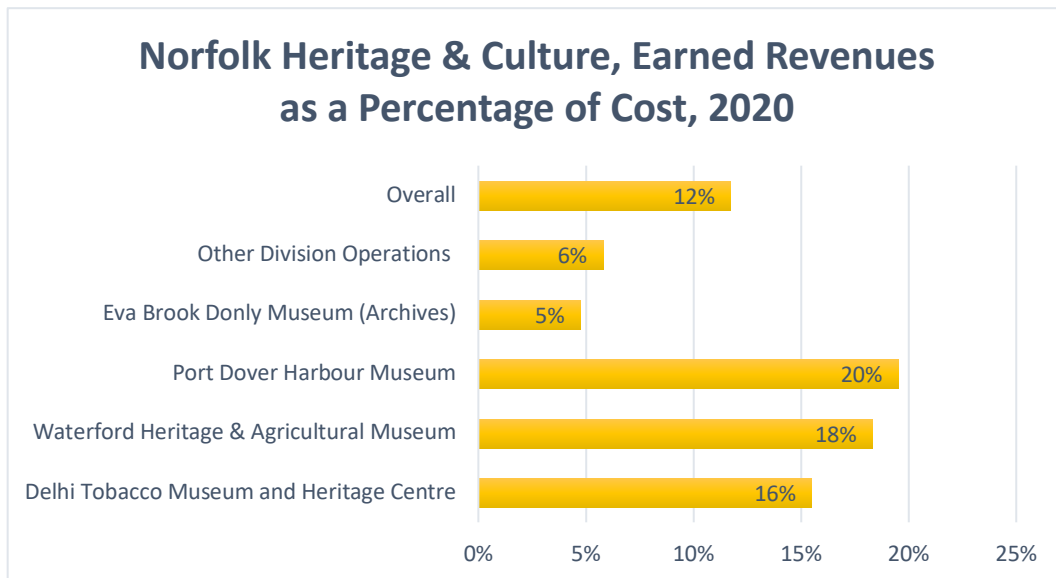
The large category of ‘Other Department Operations’ contains a wide range of other heritage and culture operations across the County, including:

- Heritage and Culture Admin
- Norfolk Heritage Committee
- Norfolk’s War Memorial, Carillon Tower
- Norfolk County Book of Remembrance
- Quance Mill
- Alligator Tug
- Port Dover Lighthouse
- Teeterville Pioneer Museum
- Teeterville Women’s Institute Hall
- Norfolk Arts Centre

The chart below shows earned revenues at each of the facilities, and what the Division overall generates in this regard. As shown, the overall percentage is 12%, meaning that the Division ‘earns back’ 12% of its operating budget through user fees, special event charges, grants that it has applied for and received, etc. This compares to a national average for heritage institutions

⁴ Government of Canada: *Survey of Heritage Institutions*, Canadian Heritage, published 2019 and based upon 2017 data. Based upon survey of 2335 heritage institutions (museums, historic sites, art galleries, botanical gardens, zoos).

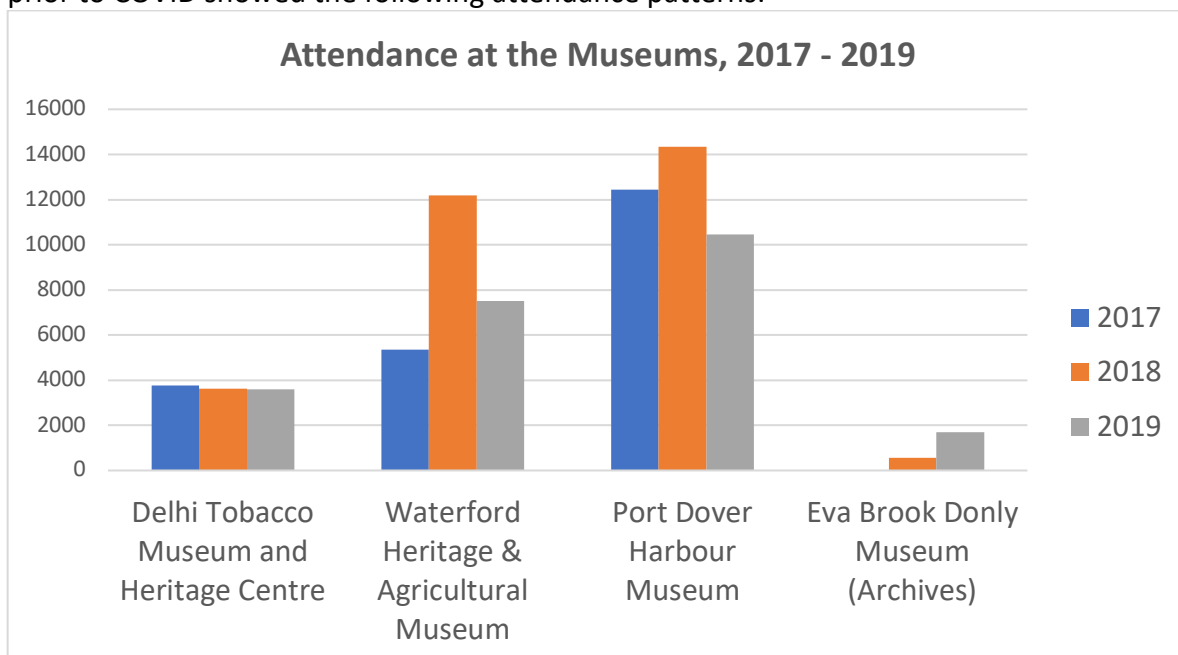
of 33% (based upon the 2019 Survey of Heritage Institutions, undertaken by Canadian Heritage). Not surprisingly the individual museums, where special events are held and admission fees charged, have the highest percentages of earned revenues (with the Port Dover Harbour Museum being the highest) but none approaches the 'national average'.



If the costs of 'Other Operations' (which, as shown above, comprises 39% of total Departmental costs) are removed from the budget, and operating revenues are compared just against the costs of the operating museums, then the earned revenue percentage increases to 20% - still less than the national average, but somewhat better.

Attendance Patterns

Patterns of attendance for the museums and archives operations over the three year period prior to COVID showed the following attendance patterns:



All facilities have shown inconsistent attendance patterns in the three years prior to the pandemic. The Delhi Tobacco Museum and Heritage Centre has shown a small but steady decline over the three-year period; the Waterford Heritage and Agricultural Museum went up then down, as did the Port Dover Harbour Museum; and the Archives operation grew somewhat in the last couple of pre-pandemic years.

The Port Dover and Waterford Museums are the most ‘successful’ in terms of average levels of attendance, at 12,400 and 8,300 respectively. The Delhi Tobacco Museum and Heritage Centre’s average level is approximately 3,700 while the Archives is about 750.

When interpreting these figures, it must be noted that archives operations are fundamentally different from museum operations. Visitors to archives typically spend longer (as they are engaged in research) and often visit for several days in sequence as they are undertaking their investigations. Museum visits by contrast tend to be shorter in duration, and very few visitors will visit for days in a row. As well, visitors to archives tend to be very intentional, and may have travelled some distance specifically to look up information that is only available in that particular archives. Museum visitors by contrast, (who are not local residents) are usually in the area for other reasons to do while they are in the area for other purposes (or passing through). As a result, not surprisingly, there tends to be fewer visitors to archives than to museums as a general rule.

The information presented in the chart above is presented only to show the trends in utilization, and not in any way to infer that the archives in ‘underperforming’ because it has lower visitor numbers. Also, it should be recognized that the Archives had been close for much of 2017 and re-opened under Norfolk County in July, 2018.

Statistics are also kept for other measures relating to community engagement. In 2019, community engagement with the museums on all dimensions was reported as being the following:

Measure of Community Involvement	2017	2018	2019	Pattern
Total Visitors	25,872	35,057	27,908	fluctuated
Total Volunteer Hours	7,421	6,001	7,152	fluctuated
Programs	271	223	242	fluctuated
Donations	268	803	676	fluctuated
Acquisitions	30	79	108	steady
Community Groups Involved	218	29	157	fluctuated
Outreach	12,200	24,215	28,661	growth
Rentals	8	15	48	growth

A.5. Cautions and Caveats

There are a number of cautions and caveats that should be kept in mind when reviewing this analysis. These include:

- **concern about overall County budget:** This project was undertaken when there was concern about the County's overall finances and whether a museums operation of any type at all was sustainable. There appeared to be, on the part of some, a perception that the municipality was 'overspending' on heritage and museums. Upon a careful analysis comparing 'like with like' this turns out not to be the case (see the benchmarking section of this report), but the perception existed and may have influenced some of the survey results and stakeholder interviews.
- **analysis undertaken during the pandemic:** This entire project occurred in 2021, when the full effects of the COVID-19 pandemic were being felt. Because museum operations were totally shut down, and there was a general uncertainty about when or how museums would open again (along with most other activities), there was significant trepidation about the future of the museums operation.
- **this is a high-level analysis:** As was made clear in the Terms of Reference for the project, this was a 'high-level' study, aimed at determining ways and means for appropriately scaling the County's museum operation and making it viable in the longer term. It is, in a way, a 'strategy for sustainability'. Accordingly, not all of the strategic directions and recommendations suggested here will be fleshed out in great detail; many will require some further work in their implementation. Nevertheless, this plan will outline a path to move the museum system towards greater sustainability orientation.
- **a 'return-on-investment' orientation:** As was earlier mentioned museums typically, almost never, will make a profit, or even break even. Their value lies in other contributions to the municipality, measured in indicators such as attendance, program utilization, volunteer involvement⁵, social media engagement, partnership development, outreach contacts, venue rentals⁶, collections growth and refinement, and the like. 'Sustainability' is then considered in terms of the value of these sometimes intangible benefits relative to the amount of municipal subsidy involved,

⁵ One school of thought, to which we subscribe, is that museums, heritage sites and other cultural venues have a **duty** to provide meaningful and interesting volunteer opportunities to the public, and thus one measure of successful interaction is the number of volunteer opportunities provided.

⁶ Rental of facilities is important not so much for the revenue generation potential (although that can be significant) but more so because it often exposes people who have never been to the museum before to what is available there. This may represent new markets for the museum.

B. Data Collection and Situation Analysis

B.1. Findings from the Site Visits

Site visits were made by the entire study team to each of the four facilities (as well as, for context, to the Teeterville Pioneer Museum and the Norfolk Arts Centre. Also, a subsequent visit to the County Administrative Building in Simcoe (suggested as a potential site for a centralized facility) was undertaken.

The following charts illustrate some of the highlights of these visits and outline the major issues and opportunities noted.

Common themes for all or most facilities are:

- not family friendly
- limited space
- poor signage
- slow turnover of exhibits
- need for site maintenance
- underutilized spaces

Waterford Heritage and Agricultural Museum

Positive Attributes

- Exterior spaces offer potential for outdoor programming or expansion
- Connected to public trails
- Exhibit spaces are large and unique
- Wonderful exhibits presented in dynamic arrangements and vignettes
- Interesting artifacts on display of a variety of sizes and types
- Temporary exhibition space available

Areas for Improvement

- Site requires maintenance and improvements to signage and visitor amenities
- Exhibits lack contextual information related to artifacts
- Limited of thematic narratives
- Limited space for changing exhibitions
- Consolidation of display case types for improved visual harmony
- Lack of interactive elements
- Not family friendly



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CLIENT:

Norfolk
COUNTY

PROJECT:

2104 Norfolk County Museums - Sustainability Plan

DRAWING:

PHASE:

ISSUED FOR:
Review

ISSUED DATE:

October 1, 2021

Delhi Tobacco Museum



Positive Attributes

- Prominent and accessible site
- Charming recreated storefronts
- Spacious main exhibit area
- Added contextual value with tobacco kiln and mill building
- Interesting subject matter
- Temporary exhibition space available
- Public programming opportunities available

Areas for Improvement

- Exterior of building requires curb-appeal improvements
- Agricultural theme similar to Waterford
- Main exhibits space requires context and explanation for artifacts
- Museum name and subject matter is contentious
- Not family friendly
- Lower and Mezzanine level not utilized effectively for exhibits
- Difficult to upgrade saw mill for public access



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October 1, 2021

Norfolk County Archives and Eva Brook Donly Museum



Positive Attributes

- Central location
- Museum a snapshot in time
- Archives well maintained and organized
- Storage is high standard
- Exterior opportunity for additional programming in the backyard

Areas for Improvement

- Museum is missing contextual information
- Museum not relevant to most people
- Limited space for changing exhibits
- Not effective for repurposing of museum space for archives
- Underutilized storage spaces
- Understaffed for maintaining archives
- Archives exhibit space requires proper location away from direct sun light
- Limited public programming opportunity
- Attracting limited visitor type



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CLIENT:
2104 Norfolk County Museums - Sustainability Plan

DRAWING:

PHASE:
ISSUED FOR:
Review

ISSUED DATE:
October 1, 2021

Port Dover Harbour Museum



Positive Attributes

- Accessible location in tourist area
- Ideally situated along water
- Wonderful dynamic displays
- Some interactive exhibits
- Narratives and thematic content enriches visitor experience
- Relevant themes on display
- Changing exhibition space
- Current exhibits can be updated regularly

Areas for Improvement

- Almidart in poor shape
- Opportunity to improve wheelhouse experience
- Improve space for indoor programming
- Improve storage space and systems



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Toronto, ON M4S 1Y5
Canada



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Colborne Administrative Building* (or other centralized site)



Positive Attributes

- Centralized location
- Accessible site
- Iconic historical building
- Large open exterior space
- Efficiency in consolidated collection management and staffing
- Space to expand building on site
- Opportunity to combine all the collections into new relevant stories

Areas for Improvement

- Interior spaces not suitable for exhibits or storage
- Expansion and retrofitting current building requires significant capital investment
- Consolidating the disparate collections will be a challenge
- Central site removes context of current museum sites (ie Port Dover)

* The Colborne Administrative Building is a designated property under the Ontario Heritage Act. Any alterations to the building or site requires permission from the Ontario Heritage Trust.



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B.2. Key Stakeholder Interviews

In addition to a survey of the general community and a separate survey of staff and volunteers associated with the museums, a series of confidential interviews with key stakeholders was undertaken. These were elected officials (Mayor and councillors) and senior municipal officials. Their opinions were often quite strong, and, as might be expected, not all in agreement with one another.

The major opinions heard, without reference to 'who said what' in order to preserve confidentiality, were as listed below. In cases where there appear to be disagreements, this is noted.

Also, it should be recognized that the points made below reflect perceptions that in some cases may not accord with the actual situation.

- first, everyone acknowledged that it was important that education of residents and visitors regarding the history of the County was important, and that it was desirable to maintain some form of museum presence in the municipality (even though the provision of a museum(s) operation is a discretionary service and not mandated under the Ontario Municipal Act)
- there was also agreement that prior to the pandemic, staff had been doing a great job of providing programs and services to the general public (as well as visitors to the County)
- another point of acknowledgement and recognition was that the last couple of years had been a particularly stressful time for the museums, for staff and volunteers alike, and that it was hoped that this Museum Sustainability Study would result in a clear and preferred direction that would be a logical path forward

Three areas where some disagreement was evidenced were the following:

1) Centralization *versus* status quo:

- some felt that the existing system of the municipality maintaining three community museums and an archives operation was unsustainable, and that they should all be consolidated into one larger facility (the County Administrative Building was specifically suggested for this purpose, which is why it was part of the site review) – others felt that perhaps some consolidation was warranted, with maybe one or two of the other operations closing – a related perspective was that a centralized or consolidated facility would allow an integrated history of the entire County could be told

versus

- an alternative perspective that each of the community museums fulfilled a vital purpose in portraying the history of that area, and should be maintained

2) *Paying too much for the museum program versus the importance of investment in museums*

- related to the previous point of unsustainability, some interviewees said that the County was paying too much for too many museums, and that the costs of doing this were greatly in excess of what other comparable municipalities are paying (*note: the evidence does not appear to bear out this perception*)

versus

- an alternative perspective that museums are vital aspects of a robust society and that their costs were justified in terms of the many community benefits they offer – this view held that museums (and other arts and culture activities) were every bit as important as parks, recreation and sports in creating a healthy community offering a high quality of life

3) *Revenue generation versus free access*

- some felt that the museums should be much more aggressive in terms of revenue generation – they felt that more aggressive marketing would be more than repaid by greater levels of attendance (with higher admission fees), greater rental of the venues, and more partnerships (that would bring in revenue as well as in-kind sponsorship)

versus

- the counter perspective was that the museums should be freely available to everybody, with no price barriers preventing utilization by the community

Finally, there were comments made by one or just a few interviewees. These included:

- there is significant **redevelopment potential** around some of the sites (Waterford and to a lesser extent, Delhi, were specifically mentioned in this regard) – one possibility that should be considered would be to release the site(s) for development and then use part or all of the proceeds for the redevelopment/expansion of the museum (which possibly could be on the first floor of the development)
- despite earlier comments about the excellence of the programs, there was some thought that the **exhibits tended to be static** and that there should be greater turnover
- **greater marketing and awareness-building** at the museums needs to take place
- **Community Advisory Groups** for each of the community museums should be reinstated
- there are **deep pockets** in the County that could be tapped for museum improvement and/or expansion

- **greater use of volunteers** might be a way to cut back on high staffing costs
- **unionized environment** contributes to higher costs

Finally, interviewees were asked for ideas about improving financial sustainability as well as the kinds of indicators of success that they would like to see for the museum program. The various ideas suggested in this regard were:

Improving Financial Sustainability

- Increase County support
- Explore partnerships and sponsorships more actively
- Annual donation campaign
- Capital campaign for improvements and possibly new facility
- Raise admission prices
- More emphasis on rentals
- Tap into grant programs more effectively

Indicators of Success

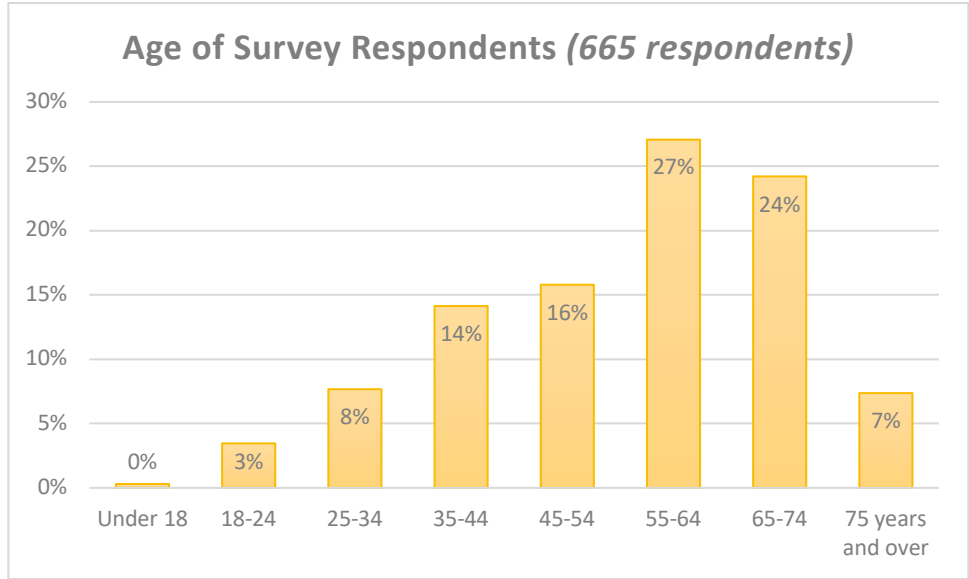
- Attendance
- Online use and indicators to measure this
- Number of events
- Partnerships
- Local media coverage
- Tourism expenditure and economic impact

B.3. Community Survey

- **two community surveys** were administered: the first was mounted for 3 weeks in July, 2021 and the second for 4 weeks in August
- the second community survey contained many of the same questions as the first, but also deleted some and added others (this was after a review of the original survey by the then-CAO of the municipality)
- incentives for participation were offered in the form of a weekly draw for various gift cards from local businesses
- in total **669 responses** were received, which is a very high response for a survey of this type; the first survey had 322 responses and the second 347

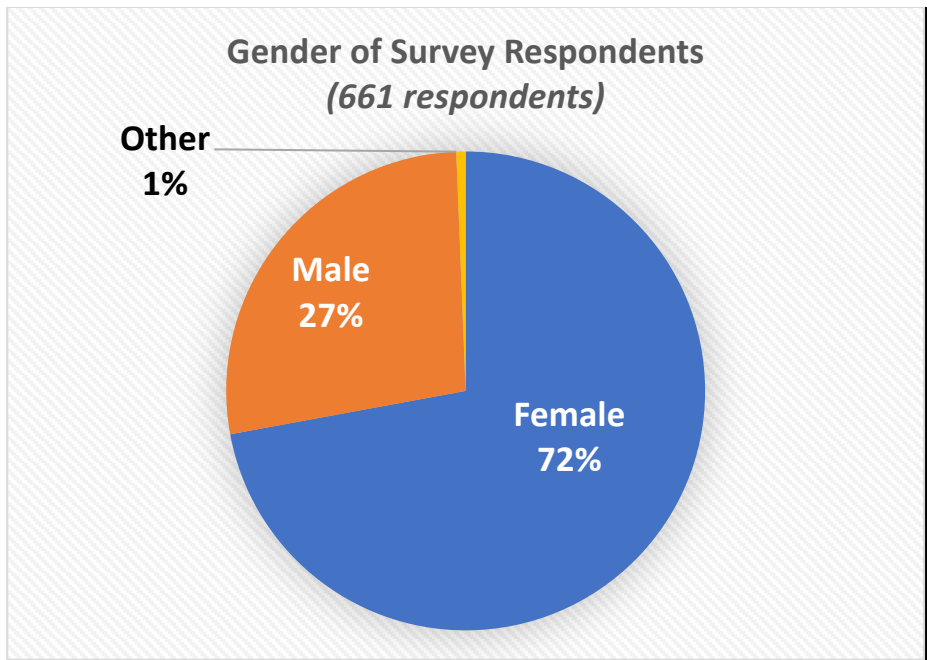
Age of Respondents (both surveys)

- good distribution with all age ranges represented
- just under one-third of respondents were seniors (normal for a survey of this type)



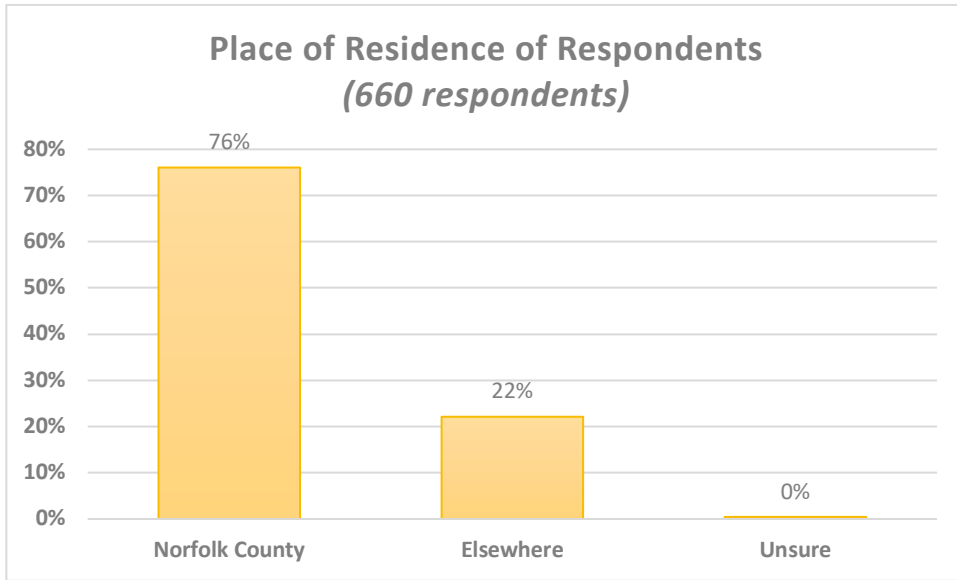
Gender of Respondents (both surveys)

- mostly female; again typical of a survey of this type

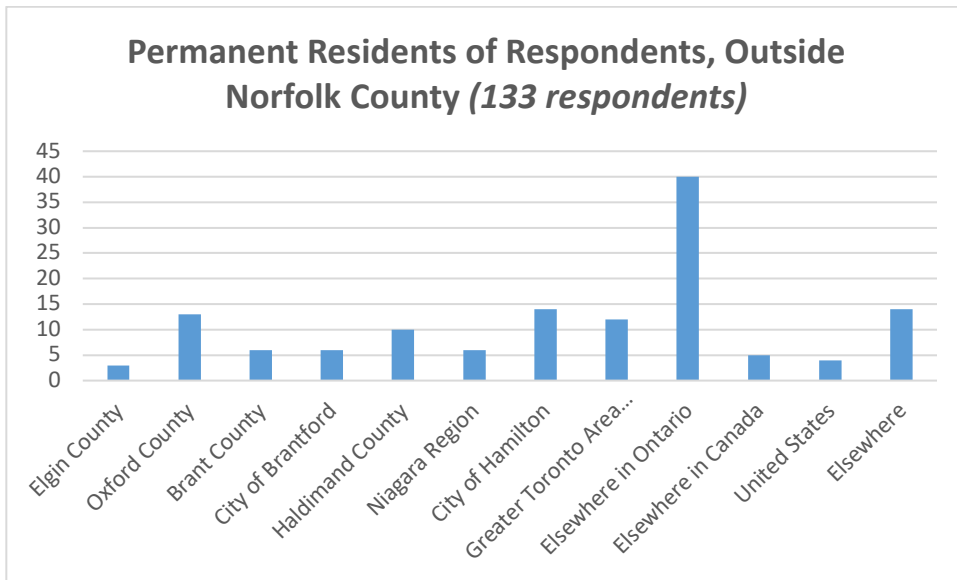


Place of Residence (both surveys)

- most live in Norfolk County:

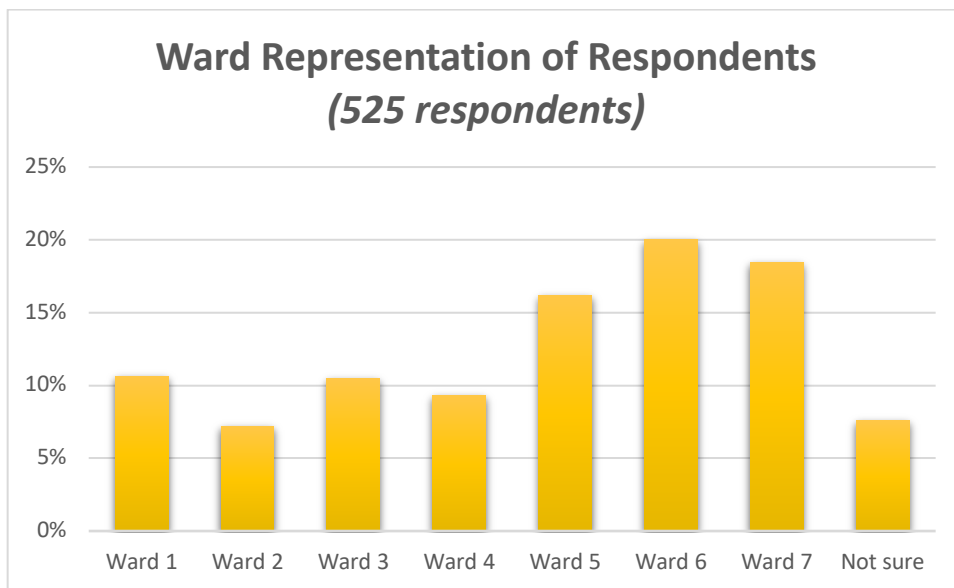
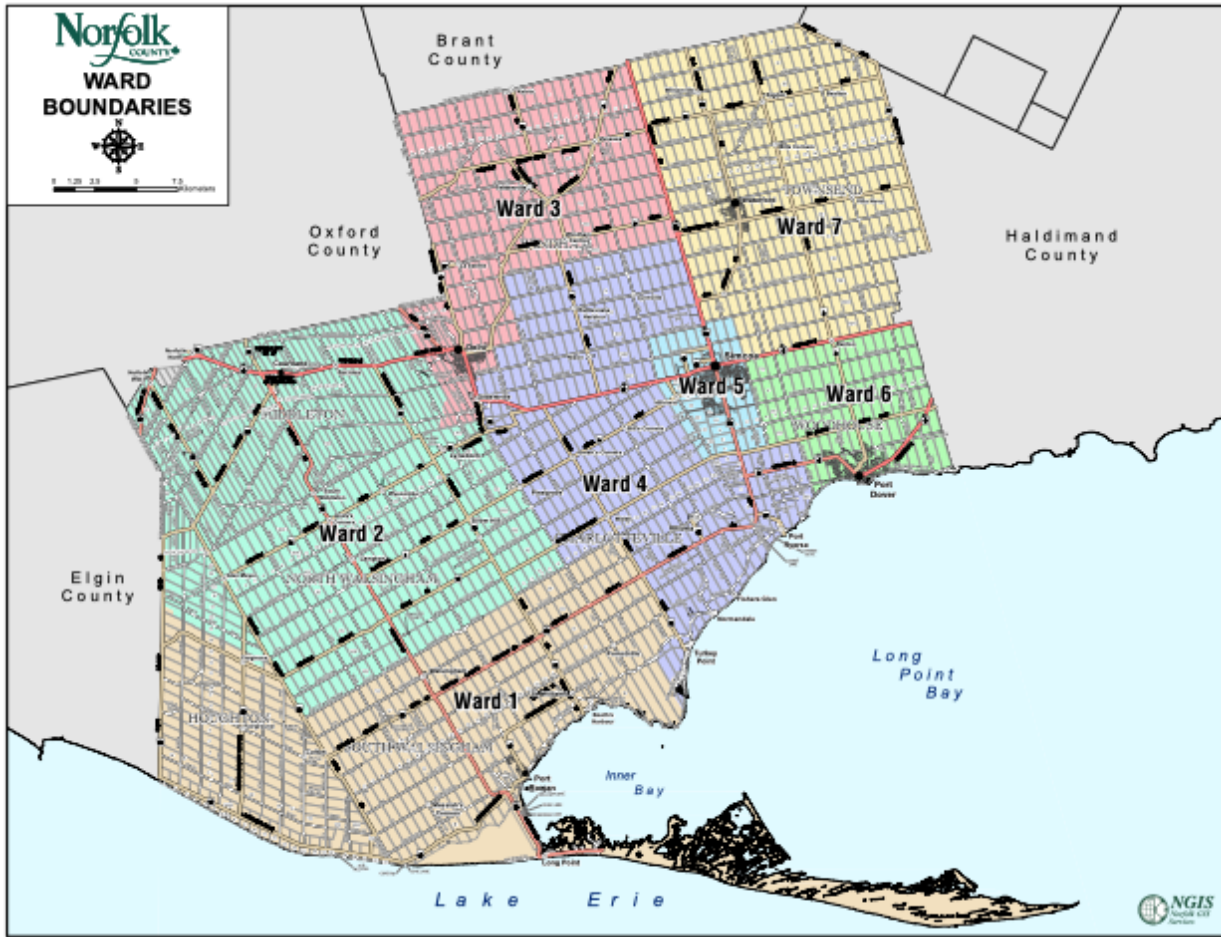


Where People Live Outside Norfolk County (both surveys):



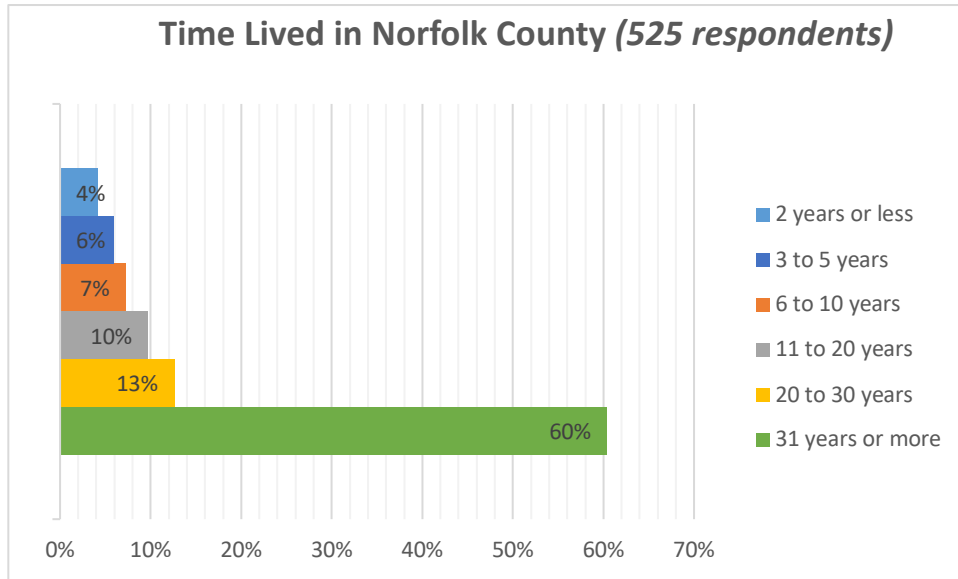
Representation from All Wards Within the County (both surveys):

- good representation from all wards across the County

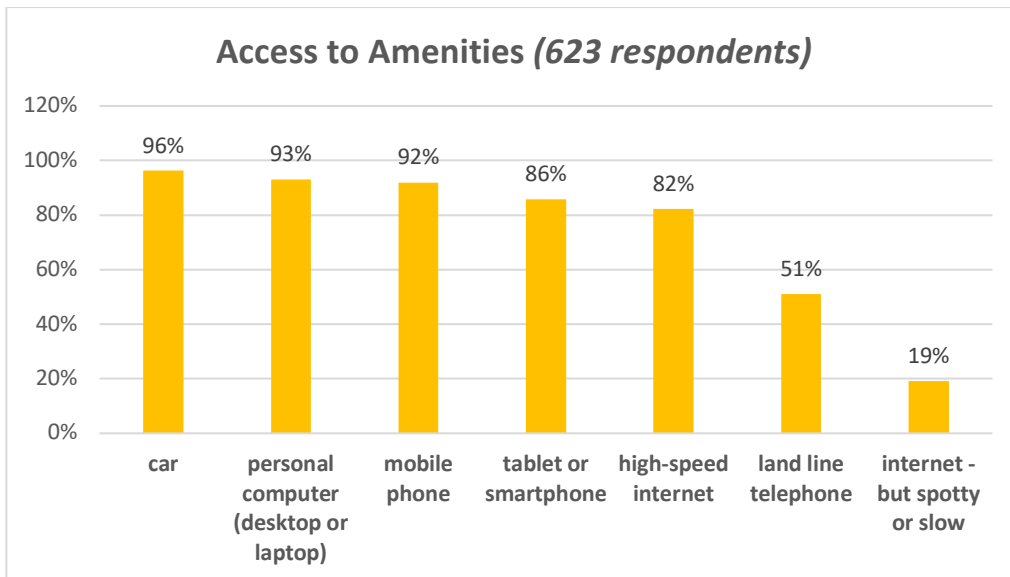


Time Lived in the County (both surveys):

- most respondents old-timers
- however, 19% were 5 years or less in the County

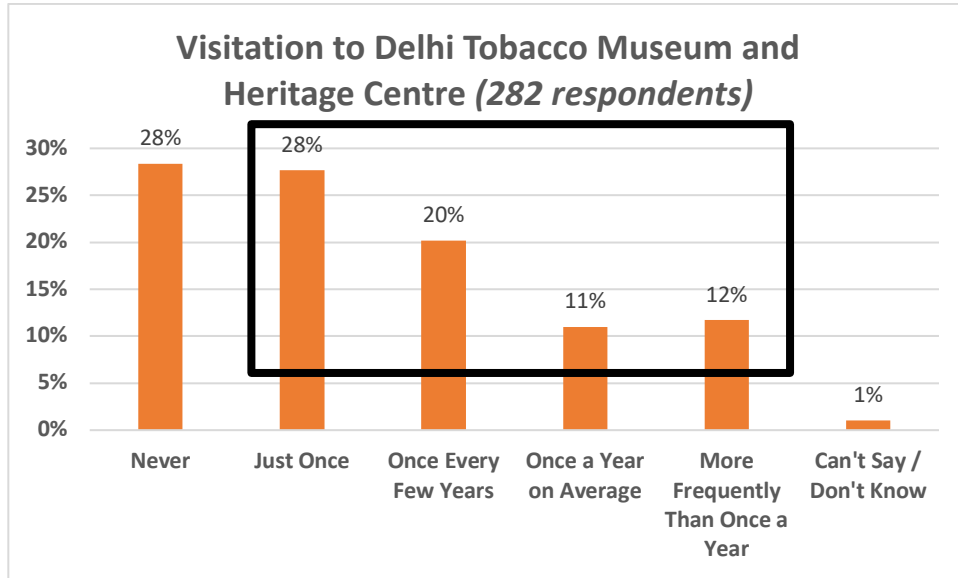


Household access to amenities (that influence accessibility to museum/archive resources) (both surveys):



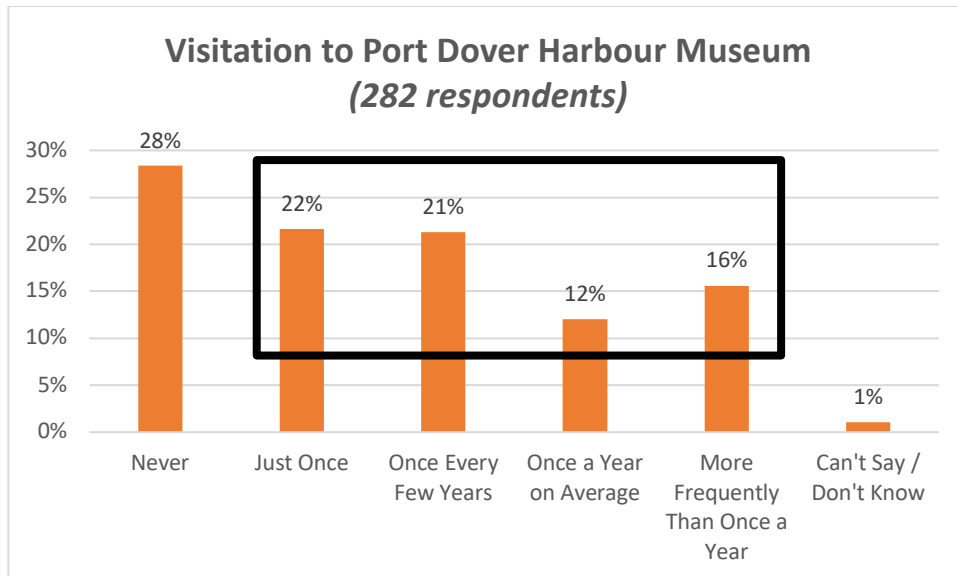
Frequency of Visitation to Delhi Tobacco Museum and Heritage Centre (both surveys):

- 71% had visited at least once; 23% once or more per year



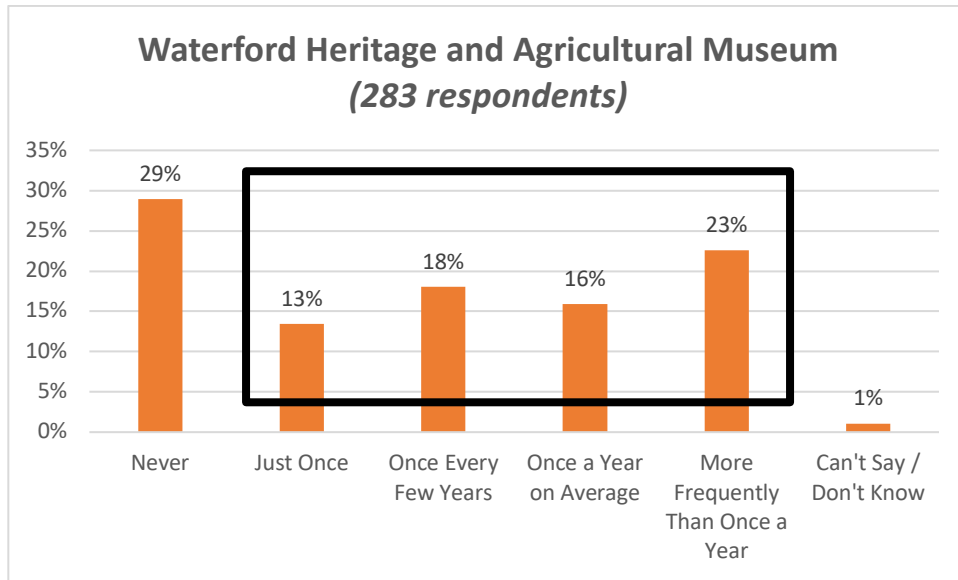
Frequency of Visitation to Port Dover Harbour Museum (both surveys):

- 71% had visited at least once; 18% once or more per year



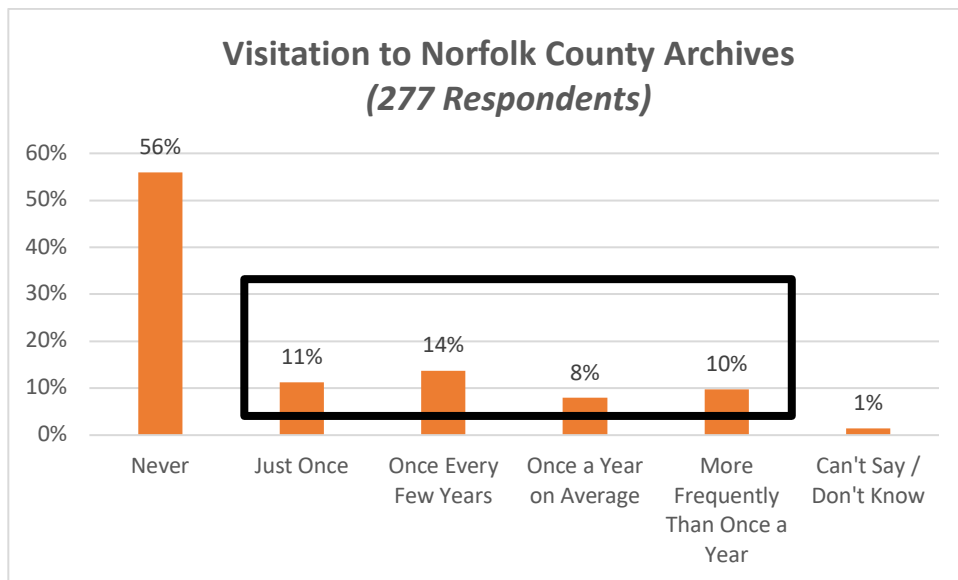
Frequency of Visitation to Waterford Heritage and Agricultural Museum (both surveys):

- 70% had visited at least once; 39% once or more per year



Frequency of Visitation to Norfolk County Archives (both surveys):

- 44% had visited at least once; 18% once or more per year



Again, as was previously mentioned, visitors to archives operations are quite different from those to museums, and thus it is no surprise that lower levels of utilization are seen: this is entirely to be expected.

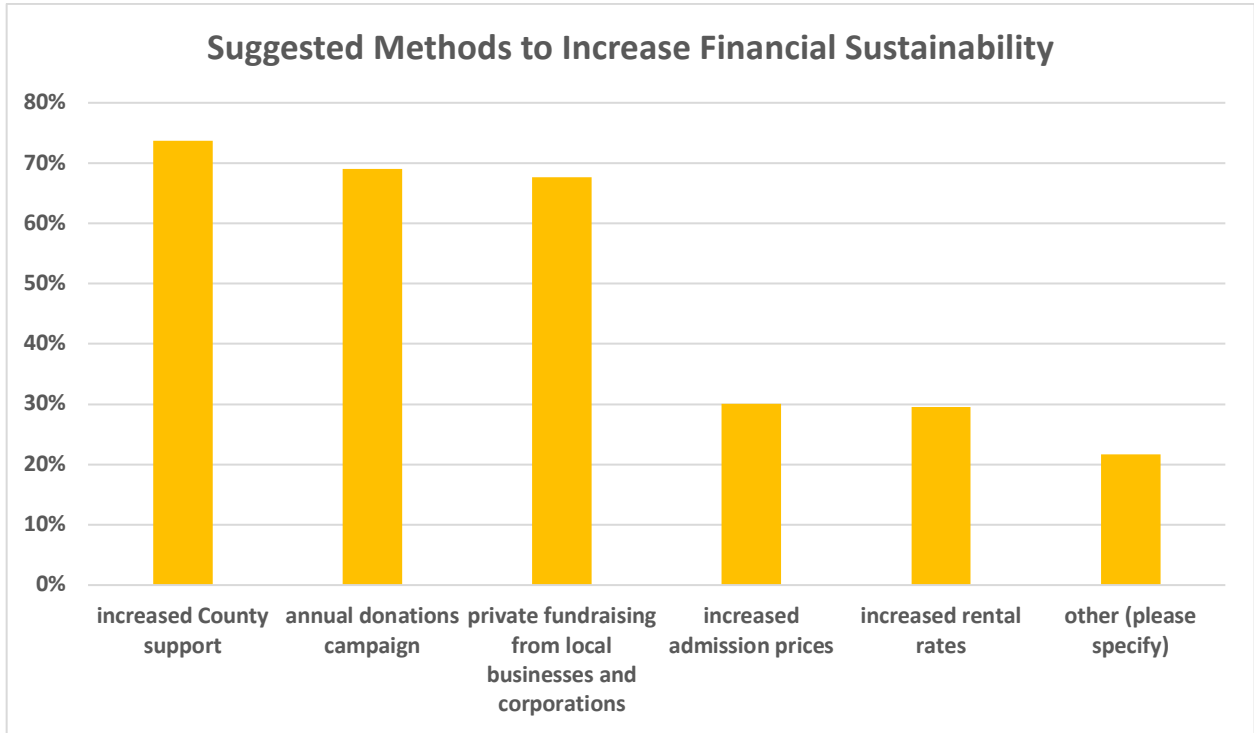
Reasons why respondents visit museums (both surveys):

- personal curiosity; special events; new exhibits major reasons for visiting:



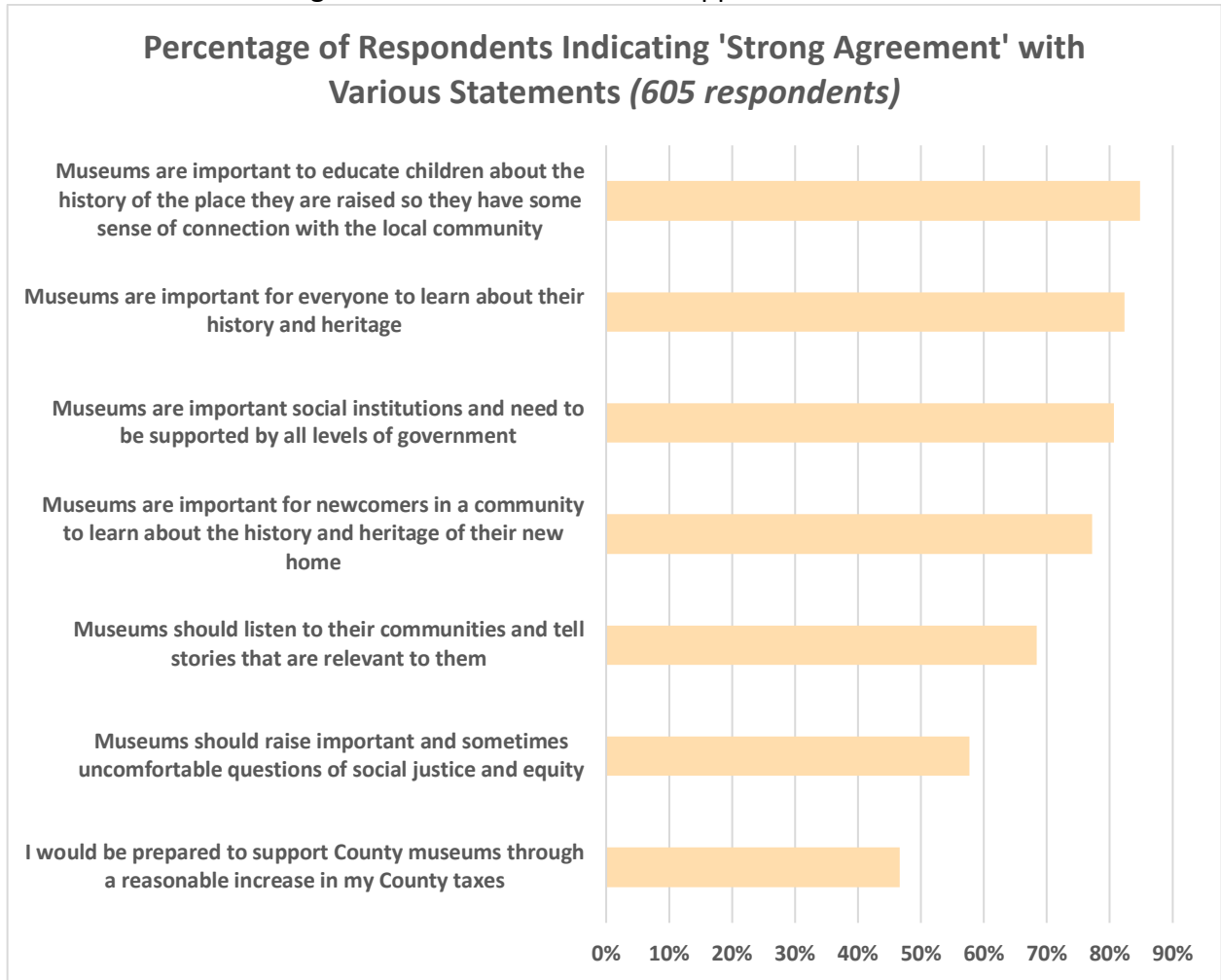
Suggestions to increase financial sustainability (both surveys):

- top three were increased County support; donations campaign; and private fundraising

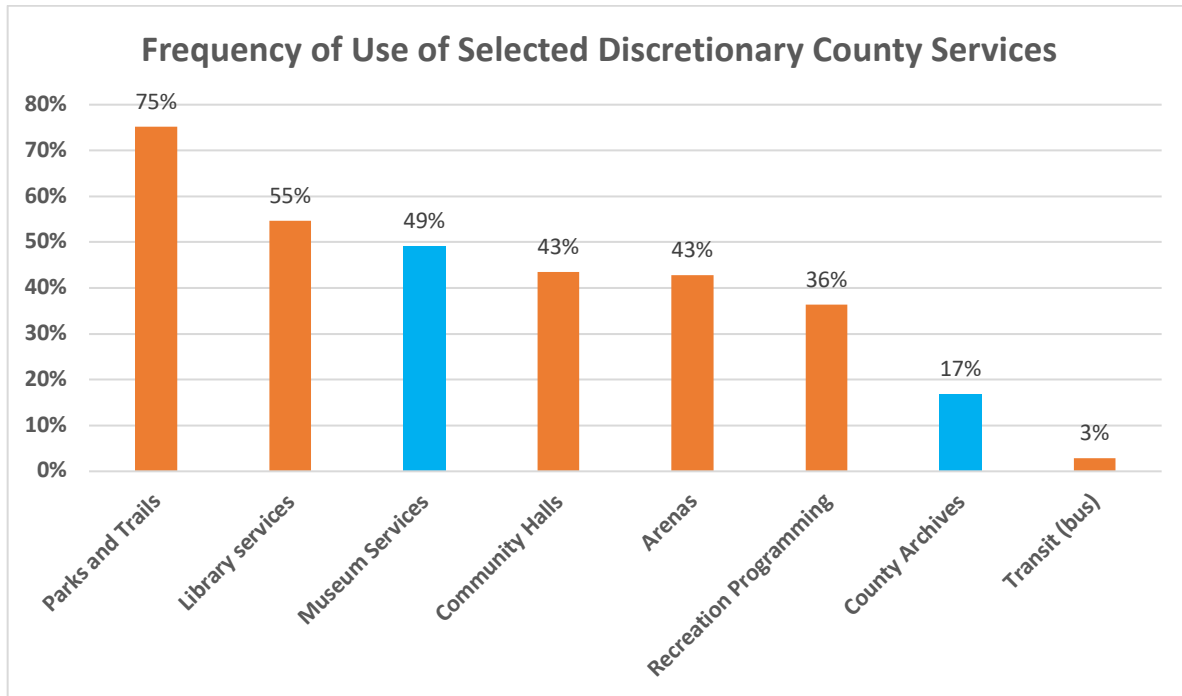


Agreement regarding the importance of museums in society (both surveys):

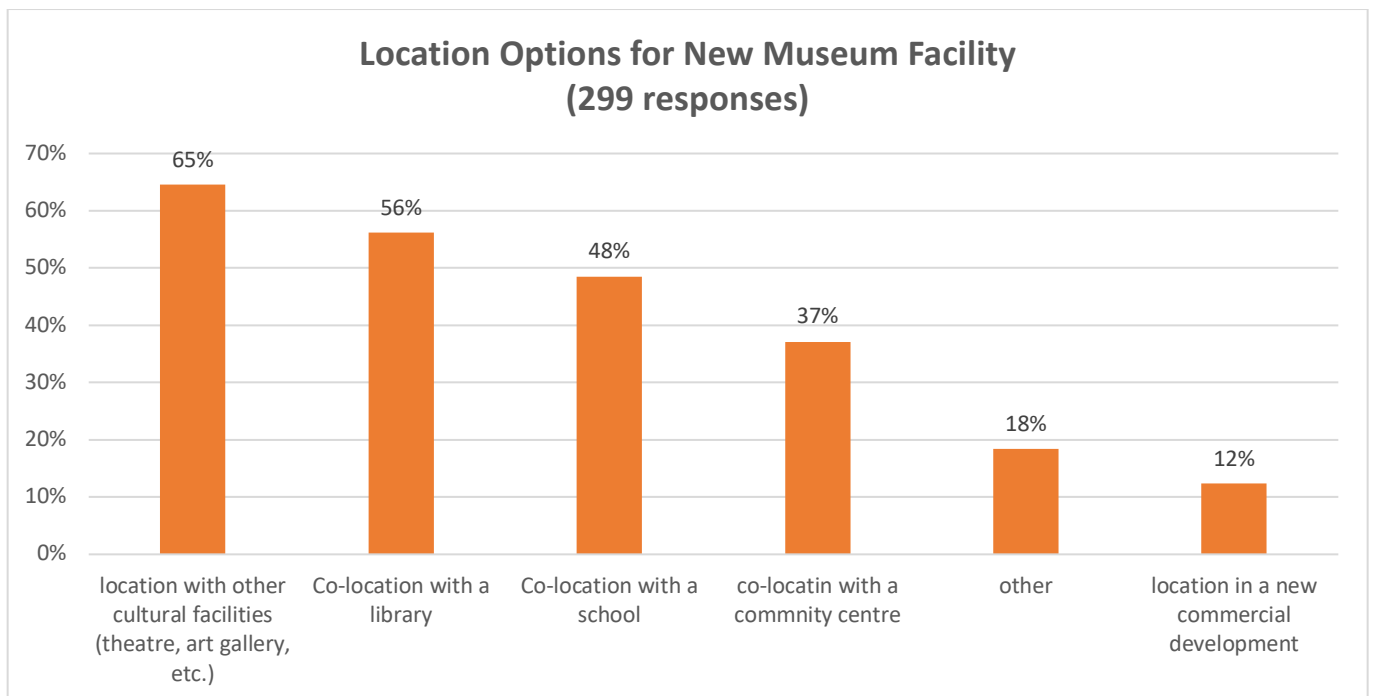
- more than half agreed with all statements of support

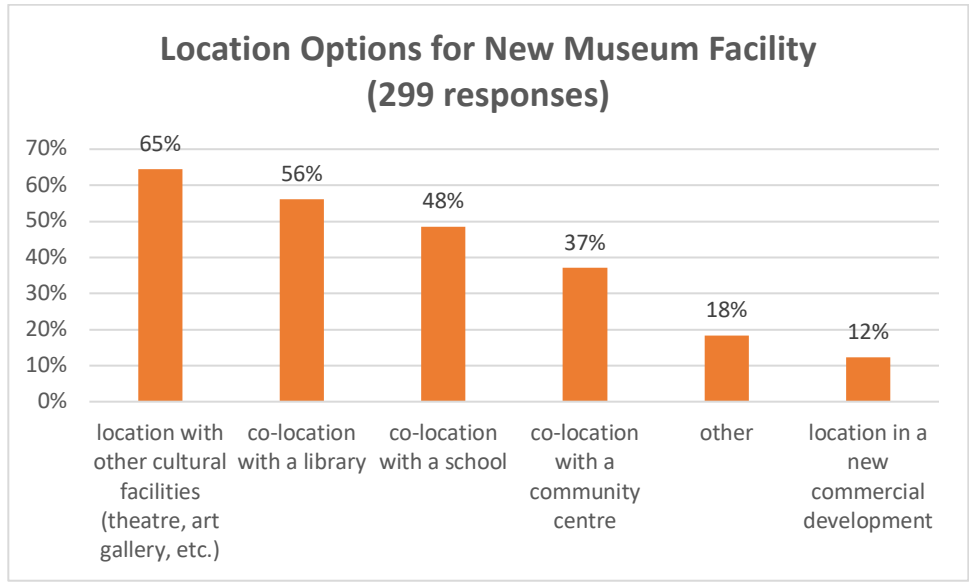


Use of Discretionary Municipal Services



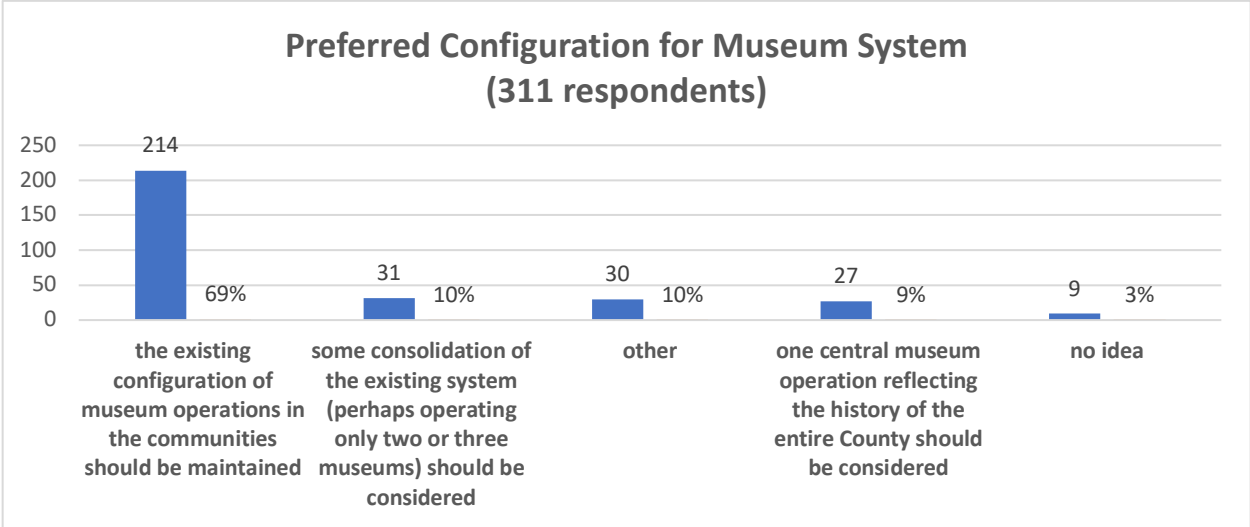
Respondents were asked if there was to be a new museum facility developed, where they would like to see it located:





Preferred Museum System Configuration

- clear preference expressed to keep the existing configuration of museums as is
- minority support for consolidation (either closing one or two museums, or creating one overall County museum)



Some Final Comments (selected to show the range and diversity of comments):

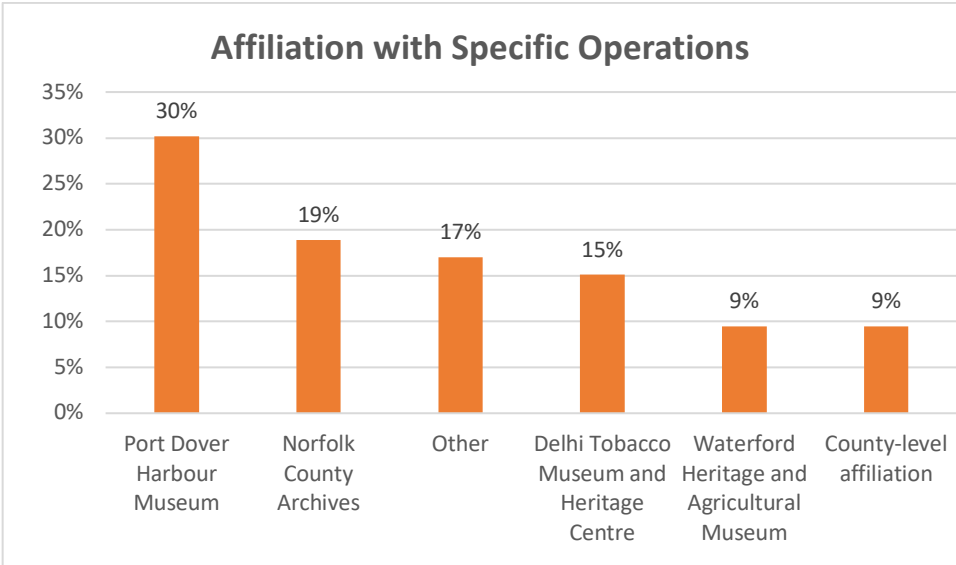
- ▶ The treatment of the Heritage & Culture division in the last past two or three years have been despicable.
- ▶ Stop closing museums and galleries. I'd rather pay a bit more in taxes than have to see perfectly good institutions close just so people don't complain about tax increases. Quality of life goes up when we actually contribute to the system as a whole. No person is an island.

- ▶ It has to be recognized that the best efforts to improve the vitality of museums may still fail without added burden to the taxpayer. The County has to be prepared to pull back even more if need be. It is an unfortunate prospect, but there are much more important challenges at this time.
- ▶ We need to invest money in our local communities but we need to help people be aware of what is here. I think you might be surprised of the many people that are not aware of our museums. Our Archives are AMAZING and need to be treasured
- ▶ I feel that raising admission rates may create a barrier. It may risk fewer people coming and limiting the people who do actually come. I feel that making people excited about the history and activities the museums offer may help. Perhaps charge for special events but create a buzz and let the people come easily. The museum's are part of the county just as much as the beaches are. So, how can we help them have a higher profile.
- ▶ Don't dismiss the county history and museums in favour of more and fancier sports venues. Before you consider closing or downsizing any of the museums consider that our Norfolk history is every bit as important to Ontario and Canada as that of Hamilton or Toronto o Kingston, for example. Why let the larger municipalities think that history has only happened in their community.
- ▶ Norfolk County 'inherited' (your words) these museums as well as the responsibility to 'preserve Norfolk County heritage' (my words). It is not appropriate to 'shirk this responsibility for current and future generations' based on a desire to 'limit overall tax increases and/or current fiscal problems coming from other directions.

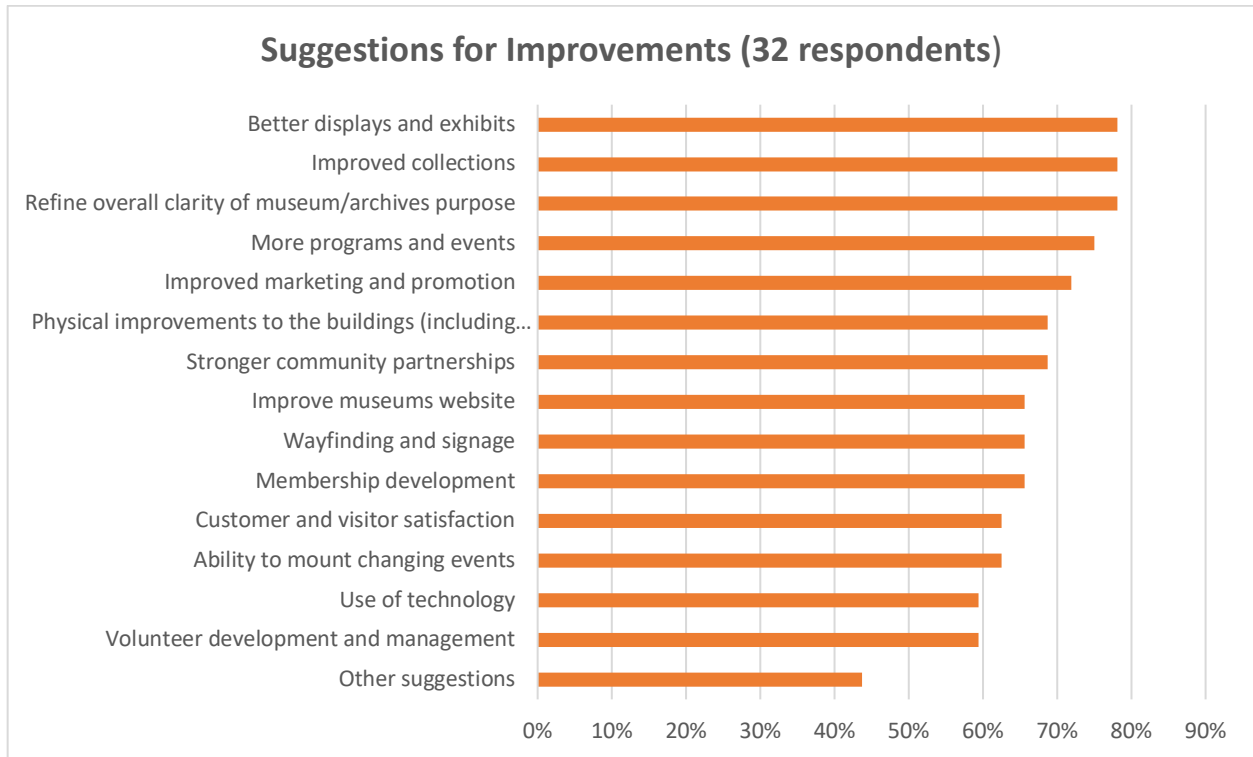
B.4. Staff and Volunteer Survey

- 53 responses total:
 - 12 (23%) County staff
 - 28 (53%) volunteers
 - 13 (25%) other (donors, residents, visual artists, other)

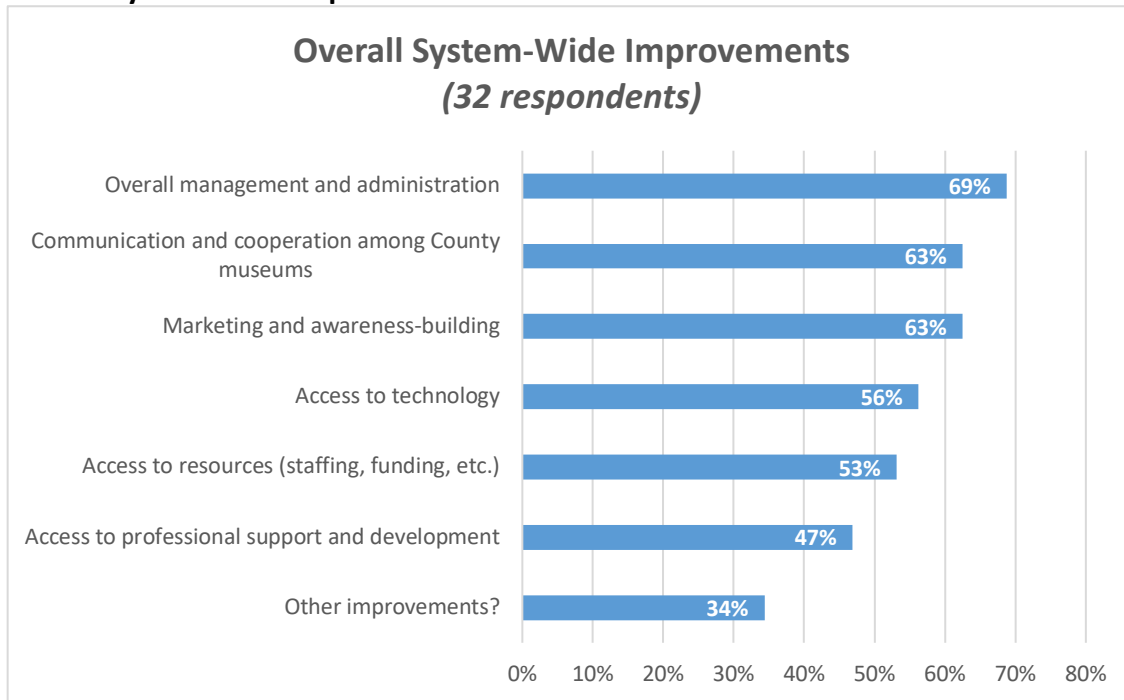
• Affiliation:



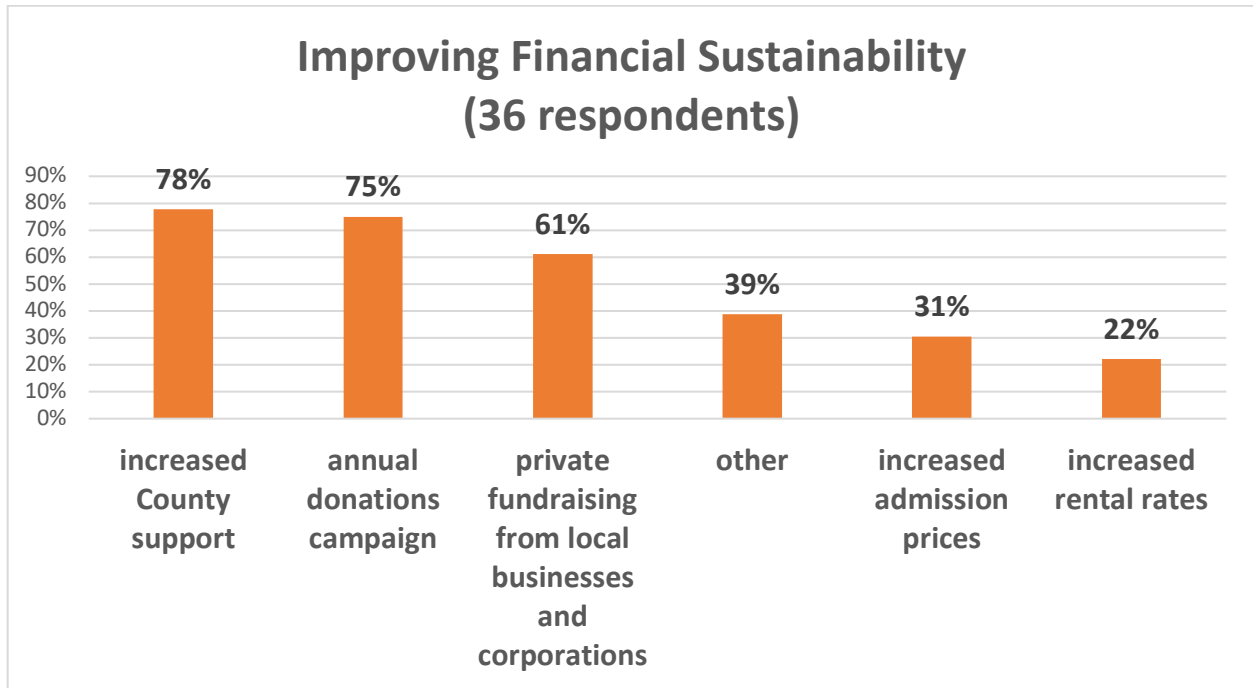
Suggestions for Improvements



Overall System-Wide Improvements:



Improving Financial Sustainability:



What are your top three priorities that you would like to see come out of the plan? (30 respondents)

Priority Area	Number of Mentions			
	Top Priority	Second Priority	Third Priority	TOTAL
Keep them open with proper maintenance	8	3	3	14
Assured funding	5	3	1	9
Council recognition of importance of history and museums	1	3	3	7
Increased attendance	1	3	2	6
Maintain / increase staffing	2	2	1	5
Encourage more and younger volunteers	2	2	1	5
Collections need to reflect local history	1	3		4
Community respect – recognition of importance of history		3	1	4
Improved marketing & awareness		3		3
Retain unique local relationship of museums to their communities	2			2
Museums should be seen as tourist destinations		2		2
Improve physical attractiveness	1			1
Respond effectively to community demand	1			1
Create excitement and buzz	1			1
Open longer hours	1			1
Diversity in the attendance base	1			1
Ensure adequate collections storage	1			1
Re-open Arts Centre	1			1
Technology upgrades	1			1
Better communication among museum/archives staff		1		1
Improved networking among staff		1		1
Greater connection with the schools		1		1
Consolidate all small museums into one facility		1		1
Enhances exhibits and events			1	1
More virtual offerings			1	1
Strong community partnerships			1	1
More community outreach			1	1
Having a solid plan			1	1

Indicators of Success (30 respondents):

Indicator	Number of mentions
Return to normal and enhanced levels of attendance	10
Regular information through newsletter of social media channels	6
Continuing donations	5
Numbers of volunteers	5
Numbers of workshops and events held and participation	4
Continuing / growing levels of financial support from County	3
Positive evaluations and reviews of exhibits and events	2
Increased partnerships	2
School programs and school group visits	2
Number of researchers	1
No further cuts	1
Reputation for innovation	1
Increased public awareness	1

Selected Comments:

*"I believe success would be **people walking through the door with their families** feeling confident we've got their back and they are safe in our building. Success would be **booking school programs** and students learning about their community's history. Success would be **holding workshops and events** that people love, feel representation from and moments where they can just have fun being freely themselves. Success would be **learning from the past to help live in the present**, through the stories we tell in our exhibits. Success would be **continued donations** of people's valued possessions. Success would **feedback** about what is currently important to people so we can address those needs and create material that matters to people. Success will be in how our **engagement with our community helps bring us all back together.**"*

*"**Culture is an integral part of county life** and is an **economic driver** for us. It not only brings in day visitors but also makes Norfolk a more desirable place to live and locate a business. Museums and arts centres **create atmosphere** in our towns and act as **community gathering places.**"*

*"Most of the Volunteers that we have are **getting up in years**. They have worked hard through the years. We need to come up with a strategy for the attention of the **new volunteers** we will need to have in the future for sustainability."*

*"...you can't help but get a sense that there is a lot of **confusion and changes in direction**. I just believe that our museums are important. They can **generate money** to help their budgets. However, if that becomes the **only focus**, then our preservation of our history gets put on back burner."*

*"Although we amalgamated in 2001, and I for one am all about the "All Norfolk Approach", you cannot deny the **community pride in our former townships**. **I do not think combining our museums into one would work**. I think that would be a challenge to lose those identities if mashed into one offering and we would **lose volunteers and community interest.**"*

*"Unfortunately, many decisions are made looking at the statistics and dollars involved. Little consideration is given to the people who live in our communities and treasure our past. Closing galleries and museums **destroys access to the resources we have**. Many, many members of our county worked long and hard to establish the collections for future generations. If you only consider numbers, the **true essence of our history will be lost for our children's children.**"*

*"Let the powers that be **pay more attention** to our museums. Do not remove the **cornerstones our fathers have set.**"*

B.5. Benchmarking Activities

This section compares the provision of 'museum and culture services' in Norfolk County to that of other comparable municipalities in southern Ontario. As will be seen, Norfolk County actually compares well against these other municipalities.

B.5.1. Museum Support in Other Communities

Here we compare financial support for museums and culture in Norfolk County with that seen in comparable municipalities. Two measures are examined: 1) per capita expenditure, and 2) the ability measures.

Per Capita Expenditure

As context for examining the support provided in Norfolk County for museums and culture, a comparison was undertaken with all other single tier municipalities in southern Ontario⁷. Only single tier municipalities (like Norfolk County) are shown because they are directly comparable. Other municipalities (which are part of upper-tier jurisdictions) may have their museum and cultural ‘needs’ taken care of in whole or in part by the upper tier level, so would not reflect that in their individual financial returns, and the results would thus not be directly comparable. (Lower tier municipalities would seem artificially low in their expenditures when compared to Norfolk County.)

The table below shows the per capita expenditure on museums and culture for **all** single-tier municipalities in southern Ontario, for 2019 (the most recent year for which complete data is available). Per capita expenditure is also shown, using 2016 census figures, also the most recent available⁸. The information is taken from the Financial Information Returns (FIRs) that are reported annually to the provincial government.

The table overleaf shows this comparison, from the highest to the lowest per capita expenditure:

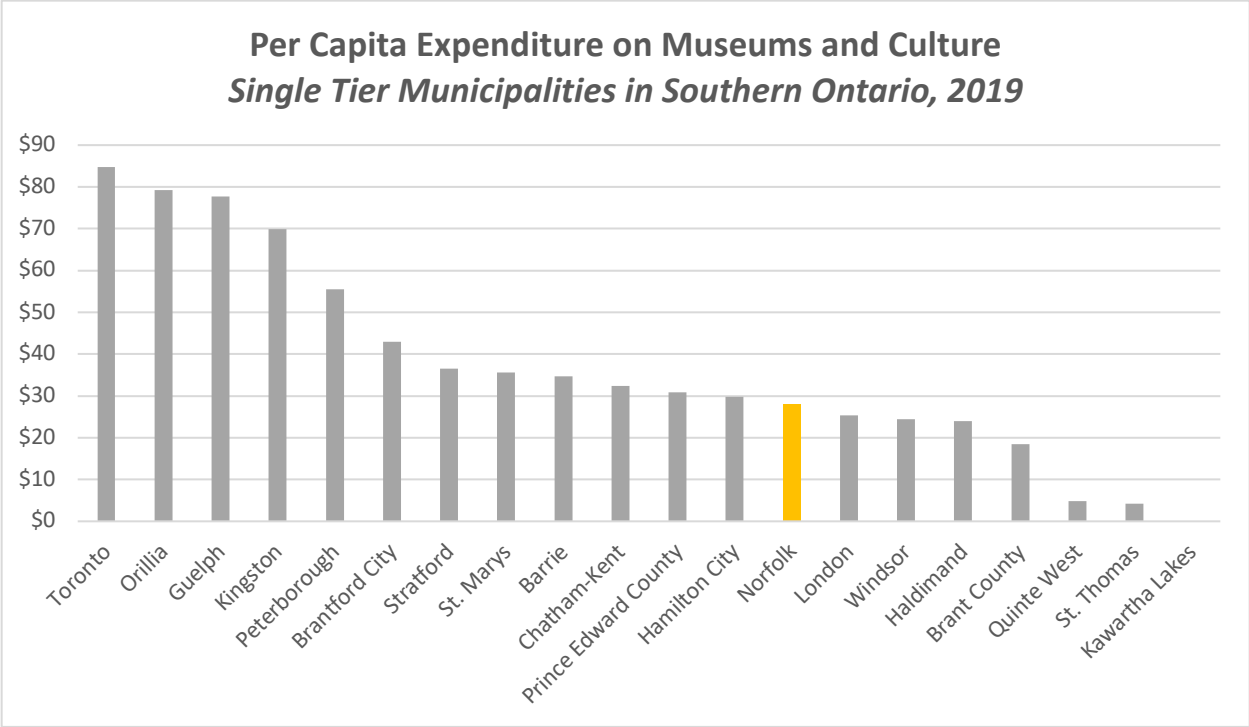
⁷ *From the Association of Municipalities of Ontario (AMO): Single-tier municipalities exist across Ontario. They include separated municipalities that are geographically located within a county (see County list) but are not part of the county for the municipal purposes. Single-tier municipalities also include all northern municipalities where there is no upper-tier governance at the District level. Finally, single-tier municipalities include those former county or regional municipalities that have been amalgamated into single-tier municipality. Single-tier municipalities have responsibilities for all local services to their residents.*

⁸ *At the time of writing the 2021 census population figures were not yet available; population counts are not expected until February 2022.*

Jurisdiction	Population	2020 Museum and Culture expenditure	Per Capita Expenditure
Toronto	2,731,571	\$231,445,791	\$85
Orillia	31,166	\$2,469,499	\$79
Guelph	131,794	\$10,245,135	\$78
Kingston	123,798	\$8,650,599	\$70
Peterborough	81,032	\$4,496,688	\$55
Brantford City	97,496	\$4,192,273	\$43
Stratford*	31,465	\$1,148,735	\$37
St. Marys	7,265	\$259,162	\$36
Barrie	141,434	\$4,903,377	\$35
Chatham-Kent	101,647	\$3,297,232	\$32
Prince Edward County	24,735	\$765,018	\$31
Hamilton City	536,917	\$15,987,601	\$30
Norfolk County	64,044	\$1,793,708	\$28
London	383,822	\$9,739,339	\$25
Windsor	217,188	\$5,297,908	\$24
Haldimand	45,608	\$1,094,767	\$24
Brant County	36,707	\$675,283	\$18
Quinte West	43,577	\$213,361	\$5
St. Thomas	38,909	\$163,609	\$4
Kawartha Lakes	75,423	\$0	\$0
WEIGHTED TOTAL OF ALL	4,945,598	\$306,839,085	\$62
WEIGHTED TOTAL EXCLUDING TORONTO	2,214,027	\$75,393,294	\$34
ARITHMETIC AVERAGE OF ALL			\$37
ARITHMETIC AVERAGE EXCLUDING TORONTO			\$36

* 2019 data unavailable; 2018 expenditure information shown in the chart.

This data is also shown graphically in the accompanying chart.



As the table and chart show, Norfolk County’s per capita expenditure on Museums and Culture is **low** compared to the average. Excluding Toronto, which is clearly an outlier, the average expenditure of single tier municipalities is \$36 per capita; Norfolk County at \$28 per capita is roughly 22% lower than average. Of course, there are some single-tier municipalities paying less than this amount – and some paying none at all (after all, the provision of museums and culture is a discretionary service, not a legislative requirement).

If Norfolk County were supporting museum and culture to the average level shown in other single tier municipalities (excluding Toronto), its budget would be just over half a million more than it currently is.

Ability to Pay (Expenditure Relative to Current Value Assessment)

Another measure of expenditure on museums and culture is to look at municipalities’ ability to pay in terms of expenditure in museums and culture per \$100,000 of CVA (current value assessment). Because most of the ‘wealth’ of a municipality is determined by the amount of assessed value that it has available to it (which then generates the tax base from which municipal expenditures are made), another relative measure is to determine how much of this wealth is spent on museums and culture.

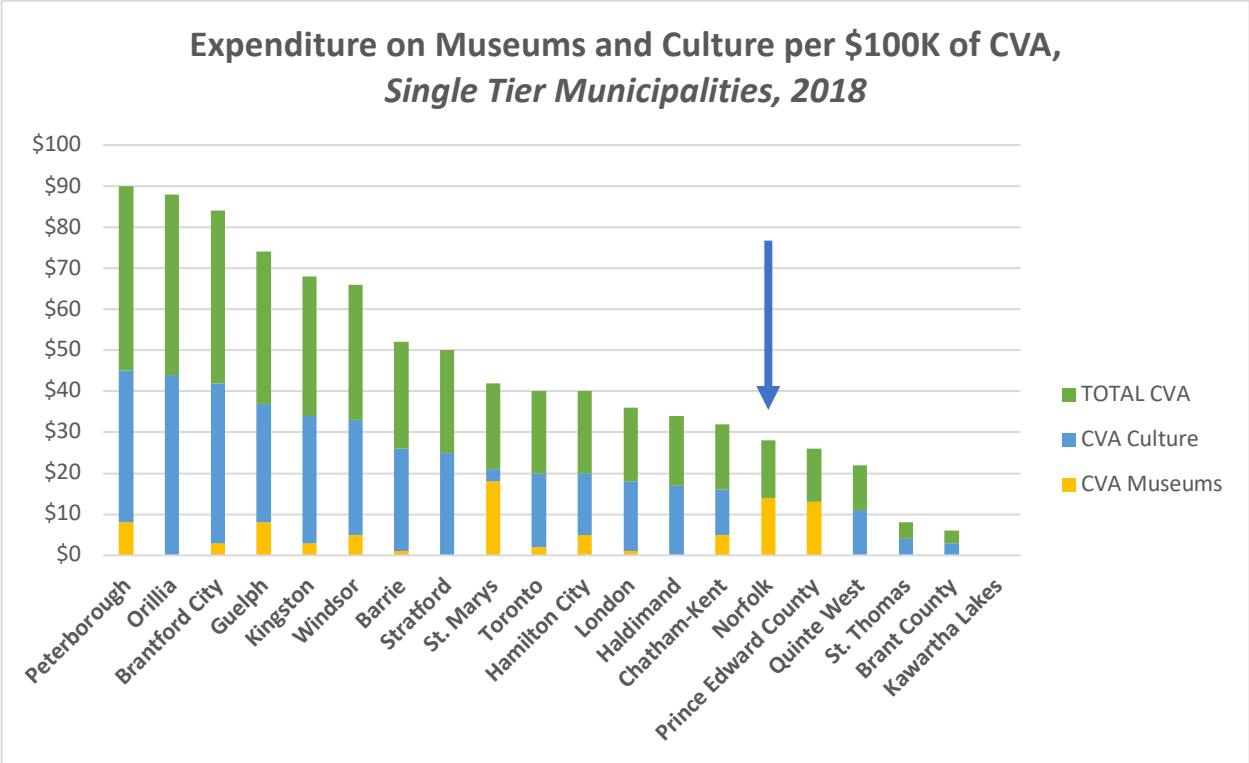
This analysis comes from BMA Management Consultants report on municipal expenditure⁹. The specific measure is the amount spent on museum and culture per \$100,000 of municipal assessment. Again, to be comparable, only single tier municipalities in southern Ontario are shown.

Jurisdiction	CVA Expenditure on Museums Per \$100K Assessment	CVA Expenditure on Culture Per \$100K Assessment	TOTAL CVA Per \$100K Assessment
Peterborough	\$8	\$37	\$45
Orillia	\$0	\$44	\$44
Brantford City	\$3	\$39	\$42
Guelph	\$8	\$29	\$37
Kingston	\$3	\$31	\$34
Windsor	\$5	\$28	\$33
Barrie	\$1	\$25	\$26
Stratford	\$0	\$25	\$25
St. Marys	\$18	\$3	\$21
Toronto	\$2	\$18	\$20
Hamilton City	\$5	\$15	\$20
London	\$1	\$17	\$18
Haldimand	\$0	\$17	\$17
Chatham-Kent	\$5	\$11	\$16
Norfolk	\$14	\$0	\$14
Prince Edward County	\$13	\$0	\$13
Quinte West	\$0	\$11	\$11
St. Thomas	\$0	\$4	\$4
Brant County	\$0	\$3	\$3
Kawartha Lakes	\$0	\$0	\$0
AVERAGE			\$22

This table and the chart below show that the average CVA spent per \$100,000 in Norfolk County was about 36% less than the average for all other single tier municipalities. When compared with the total CVA for the County of \$10.6 billion (2021 figure¹⁰) this implies a shortfall of approximately \$850,000.

⁹ BMA Management Consultants, Inc., *Municipal Study 2018*

¹⁰ See: <https://www.norfolkcounty.ca/wp-content/uploads/2021/07/2021-tax-rates-and-levy.pdf>



Conclusion

This analysis shows that Norfolk County appears to be underspending on museums and culture when compared to other single tier municipalities in southern Ontario. On two significant measures, expenditures per \$100K in current value assessment (CVA) and per capita expenditure, the municipality is significantly under the average for other comparable municipalities.

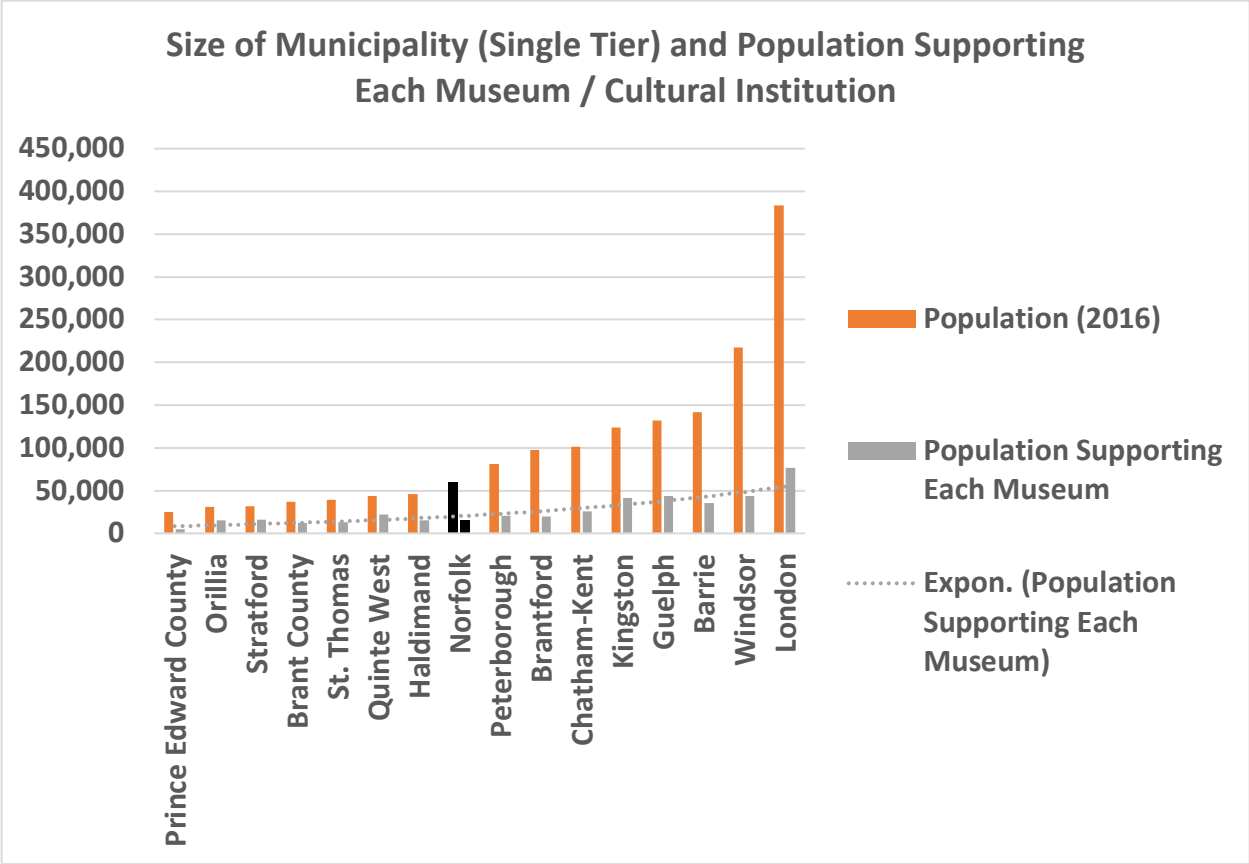
B.5.2. Other Single Tier Multiple Museum Operations

Another perspective on the provision of museum opportunities is in terms of the number of museums (or museum locations) that are supported by communities, and the ‘threshold population’ that is needed in each to support a location. Again, to be fully comparable, only other single tier municipalities are examined.

While this is a very broad-based and indicative measure, it nonetheless shows that many single tier municipalities sustain multiple museum operations and heritage locations.

Single Tier Municipality	Number of Museums / Cultural Institutions Supported (Owned)	Population 2016	Population per Museum
Toronto	10	2,731,571	273,000
Guelph	3	131,794	44,000
Orillia	2	31,166	15,600
Kingston	3	123,798	41,300
Peterborough	4	81,032	20,300
Stratford	2	31,465	15,700
London	5	383,822	76,800
Chatham-Kent	4	101,647	25,400
Norfolk	4	60,044	15,000
Haldimand	3	45,608	15,200
Brant County	3	36,707	12,200
St. Thomas	3	38,909	13,000
Windsor	5	217,188	43,400
Prince Edward County	5	24,735	4,900
Barrie	4	141,434	35,400
Brantford	5	97,496	19,500
Quinte West	2	43,577	21,800
<i>Average of All Single Tier Municipalities</i>			64,507
<i>Average of All Single Tier Municipalities Excluding Toronto Outlier</i>			27,900
<i>Average of All Single Tier municipalities with Populations Under 100,000</i>			14,900

The graph below shows the relationship between the population size of the municipality and the larger threshold sizes required to support an museum – as the trend line shows, in larger communities each museum and historical site operation supported by the municipality can ‘support’ a larger population, demonstrating a certain economy of scale in these larger communities.



The earlier table shows that across all single tier municipalities, the average level of population threshold to support a museum/heritage site operation is nearly 65,000; however, when the extreme outlier of the City of Toronto is removed, that drops to approximately 28,000. Further, when only relatively smaller single tier municipalities of 100,000 or less are examined, then the population to support an operation falls to about 15,000 – exactly the figure seen for Norfolk County.

Conclusion

When looking at the average size of population ‘supported’ or ‘associated’ with each museum and historical site operation, Norfolk County is at exactly the same level as its peers (considered to be single tier municipalities of 100,000 or less in southern Ontario) in terms of the numbers of institutions it supports. Again this is contrary to perceptions on the part of some that the County has ‘too many museums’ or that it is somehow over-providing for residents in this regard.

B.6. Building Conditions and Capital Costs

B.6.1. Size and Age of Facilities

The four facilities comprising the museum configuration of Norfolk County consist of very distinct buildings of different ages and sizes.

Facility	Date Built and Age	Size
Eva Brook Donly Museum and Archives	1845 and expanded over time	11,400 sf
Delhi Tobacco Museum and Heritage Centre	1979	8,563 sf
Port Dover Harbour Museum	1945	8,000 sf
Waterford Heritage and Agricultural Museum	1930	19,615 sf
Total		47,578 sf

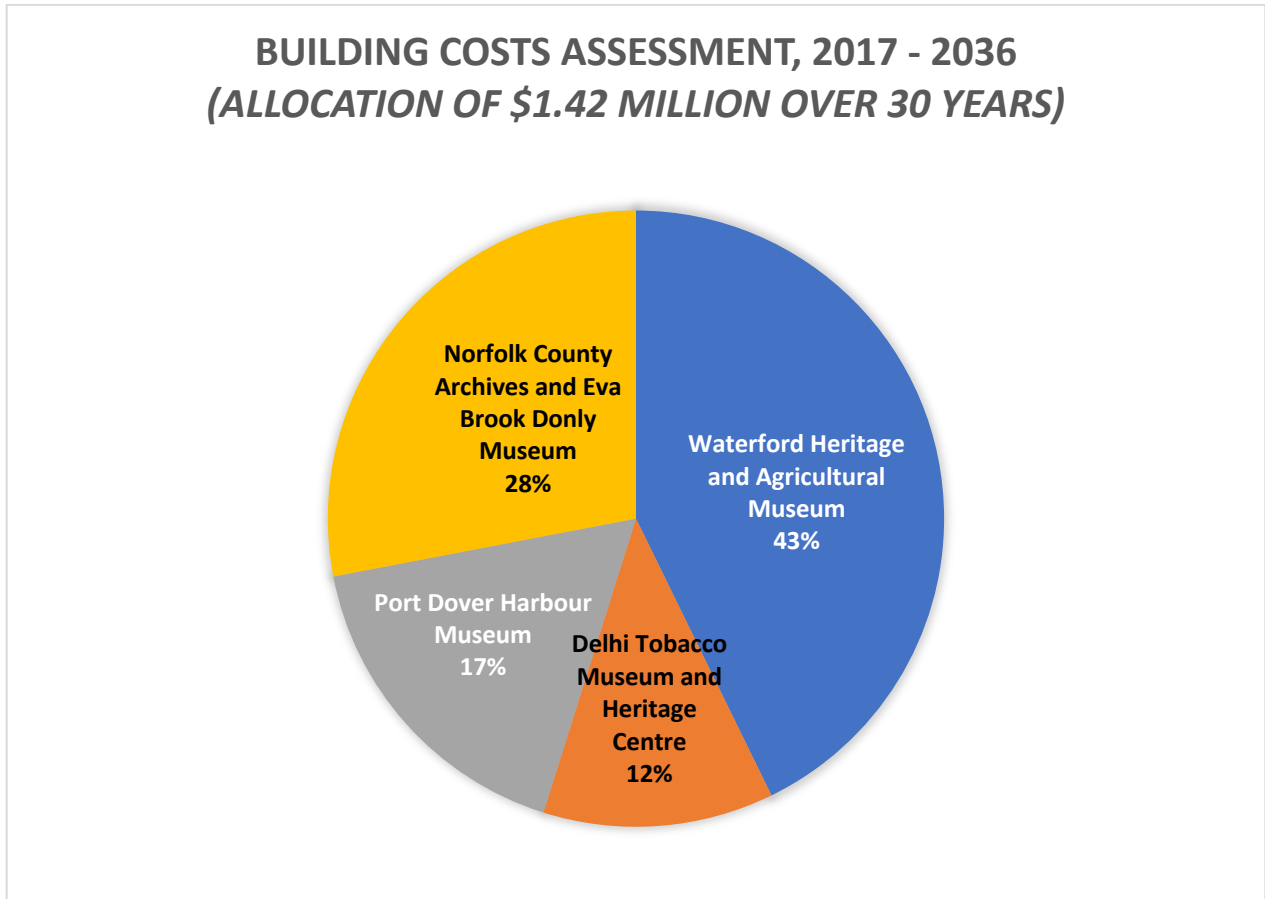
B.6.2. Building Condition Assessment

In 2017, a Building Condition Assessment report was undertaken for the museums (by Englobe). Specific upgrades that were required immediately, as well as over the 20-year period of the assessment, were identified in three main cost categories. These were architectural and structural; electrical; and building mechanical. Costs were adjusted for inflation in future by 2% per year.

In total, the capital costs for building improvements for the four facilities identified over the 30-year period were just over \$1.4 million. These represented a combination of deferred maintenance costs (that had accrued historically) as well as anticipated future maintenance costs. These costs were estimated as:

	Waterford Heritage and Agricultural Museum	Delhi Tobacco Museum and Heritage Centre	Port Dover Harbour Museum	Norfolk County Archives and Eva Brook Donly Museum	Total
Architectural and Structural	\$371,100	\$16,500	\$93,800	\$56,700	\$538,100
Electrical	\$156,200	\$113,800	\$87,300	\$214,500	\$571,800
Building Mechanical	\$80,200	\$41,700	\$62,300	\$126,800	\$311,000
Total	\$607,500	\$172,000	\$243,400	\$398,000	\$1,420,900

The largest share of these costs (43%) as shown below were for the Waterford Heritage and Agricultural Museum, and the least (12%) for the Delhi Tobacco Museum and Heritage Centre.



Also in terms of the ‘immediacy’ of these costs, the table below shows how much of the total estimated cost is for deferred maintenance as opposed to anticipated future maintenance. The table below shows how much of this expenditure was anticipated to be required in the first 5 years of the period (which could reasonably be considered to be mostly catching up with ‘deferred maintenance’) as opposed to the last 15 years (which is most likely to be regular scheduled maintenance).

	Waterford Heritage and Agricultural Museum	Delhi Tobacco Museum and Heritage Centre	Port Dover Harbour Museum	Norfolk County Archives and Eva Brook Donly Museum	Total
Total Maintenance	\$607,500	\$172,000	\$243,400	\$398,000	\$1,420,900
Maintenance Required in First Five Years (Deferred)	\$347,600	\$20,500	\$79,300	\$70,900	\$518,300
Maintenance Required in First Five Years (Regular Scheduled)	\$259,900	\$151,500	\$164,100	\$327,100	\$902,600
% Deferred Maintenance	57.2%	11.9%	32.5%	17.8%	36.5%

It appears that the costliest museum in terms of building improvements will be Waterford, and that the bulk of this expenditure should be made in the near future.

B.6.3. Capital Budget Forecast

In the County's most recent capital budget forecast, covering the 10-year period from 2021 to 2030, an anticipated \$1.696 million (current dollars) is anticipated to be spent on the four facilities, on a variety of projects. Most of these are in terms of management of the existing assets (Asset Management Capital) as opposed to new projects (New Incremental Capital). The table overleaf shows these projects.

The largest projects, each over \$80,000, were anticipated to be:

- Net Shanty Building structural repair (\$210,000, anticipated on 2022)
- Elevator upgrades at the Archives (\$190,000, anticipated in 2023)
- HVAC upgrade at the Port Dover Museum (\$130,000, anticipated in 2021)
- Accessible washrooms at the Delhi Tobacco Museum (\$92,000, anticipated in 2022)
- HVAC replacement at the Archives (\$90,000, anticipated in 2027)

Anticipated Capital Expenditure on Heritage and Culture Assets, 2021 - 2030

	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
<i>New Incremental Capital</i>										
Delhi Tobacco Museum Accessible Washrooms		\$92,000								
Artifact Storage Facility			\$53,000							
<i>Asset Management Capital</i>										
Archives Microfilm Reader	\$10,000									
Museum Archives Study		\$25,000								
HVAC Upgrade, Port Dover Museum	\$130,000									
HVAC Upgrade, Delhi Tobacco Museum			\$15,000							
HVAC Replacement, Archives							\$80,000			
HVAC Replacement, Port Dover Harbour Museum								\$50,000		
HVAC Replacement, Waterford Museum								\$50,000		
Roof Replacement, Port Dover		\$53,000								
Vertical Lift, Delhi Tobacco Museum		\$75,000								
Elevator Upgrades, Archives			\$190,000							
Vertical Lift, Port Dover Harbour Museum					\$75,000					
Loading Door Replacements, Waterford Museum	\$10,000									
Exhibit Case Replacements, Port Dover Harbour Museum		\$25,000								
Net Shanty Building Structural Repair, Port Dover		\$210,000								
Brick Repairs, Archives			\$35,000							
Insulate Back Storage Room, Waterford Museum				\$60,000						
Other Repairs and Maintenance		\$51,000	\$51,000	\$51,000	\$51,000	\$51,000	\$51,000	\$51,000	\$51,000	\$51,000
TOTAL	\$150,000	\$531,000	\$344,000	\$111,000	\$126,000	\$51,000	\$131,000	\$151,000	\$51,000	\$51,000

B.7. Review of Museum Policies

A review of the various policies of the three museums in the system against the Community Museums Operating Guidelines (CMOG¹¹) endorsed by the Government of Ontario and the Ontario Museum Association, indicated that the museums comply with many, but not all, of them:

CMOG Standard	Waterford Heritage & Agriculture Museum	Delhi Tobacco Museum and Heritage Centre	Port Dover Harbour Museum
Governance			
Finance			
Collections	✓	✓	✓
Exhibition		✓	✓
Interpretation and Education		✓	✓
Research	✓		✓
Conservation		✓	✓
Physical Plant			
Community	✓	✓	✓
Human Resources			

As municipal museums, and thus falling under a municipal purview, it is not as critical for these facilities to not articulate policies in the areas of governance, finance, physical plant, or human resources as it would be for a stand-alone non-profit museum organization (indicated in yellow in the diagram above). However, there are some gaps in other stated policies, as shown on the table. These represent areas that the museums might consider addressing in future.

Also, our review of the policies themselves showed some inconsistencies in the level of detail and thoroughness of the policies. (This likely reflects the fact that they had different authors when amalgamation brought the facilities together under the County, and they have not changed substantially since then.) As well, it was apparent by reviewing the collections policies, as well as the mission and mandate of the museums where these were available, that they are very much reflective of their local communities and their immediate surrounding economies. As was heard in the interviews, there is no one place where the entire integrated history of the County can be found.

B.8. Trends in Small and Rural Community Museums

In our recent work with small and medium sized museums, as well as our review of the relevant literature, we have noted several trends that characterize successful operations. Many of these will have direct application to the Norfolk County museums.

¹¹ Now called *Tools for Museum Practice*

- 1. Identifying their unique strategic positioning:** Smaller and community museums are increasingly realizing that they need to articulate their unique reason for being: what is it about their history that make them different from any other place? Understanding and then reflecting this unique history and positioning it so they are not just 'another pioneer museum' or 'small town museum' is increasingly important to attract the attention of potential visitors and users.
- 2. Frequent electronic communications with members:** Many successful smaller operations are taking advantage of the ease of electronic communications to correspond frequently with their memberships (e.g. at least once a month). This enables them always to be top-of-mind and relevant to their communities. Other benefits are that it is a great way to grow the membership and provides a useful benchmark measurable for reporting purposes.
- 3. Ask the community for ideas:** Increasingly museums (large and small alike) are turning to the communities they serve and asking them what they feel to the kinds of stories they would like to learn about at the museum. This change in mindset from 'curator knows best' to 'community knows best' is characteristic of a whole new 'listening' stance in museums.
- 4. Stories of diversity and inclusion:** Related to the previous point, the movement towards diversity, equity and inclusion (DEI) is a critical aspect of relevance for community museums today. Including the stories of all 'equity-seeking' groups in the community – Indigenous, other BIPOC communities, LGBTQ2+, and any other marginalized groups – will be a critical aspect of museum planning in future.
- 5. Diverse staff and governance representation:** Another aspect of diversity and inclusion will be to ensure that at both staff and governance levels, the community is reflected. This concern is affecting succession planning in museums at all levels – and influences the composition of not just staff and Boards, but volunteers, docents, advisory groups and committees, etc.
- 6. Strong online presence mandatory:** The recent pandemic has left a legacy of people who will expect to obtain content online may never physically visit the facility. Nevertheless they will expect and demand engaging content. The advantage of this is that it does enable the museum to expand its net beyond just the boundaries of the municipality (theoretically: anywhere). As well, on line content can in some cases be monetized and so can become a revenue generation opportunity.
- 7. Interactive content for in-museum visits:** Despite the previous point there will always be users who prefer an in-person visit. The challenge here will be to engage them with at least some interactive exhibits and at digital applications. There are many possibilities,

from using one's cell phone to download a museum app, to AR possibilities with an iPad (and possibly even loaning or renting the visitor a tablet for the duration of their visit.

8. Partnerships: Increasingly small and community museums are seeing that partnerships and sponsorships with the private sector and other appropriate organizations is a way to expand reach and awareness, demonstrate relevance and credibility, and optimize the use of public funds. Again, a useful measure could be the number and size of partnerships developed.

9. Sponsorships: Every community has resident families and organizations with deep pockets. Often, their wealth is derived from businesses that put the community on the map in the first place, or are deeply tied to its economic base and history. These sources of ideas and potential funding are increasingly being sought successfully by community museums.

10. Physical attractiveness and accessibility: perhaps never as important as now, small museums are critically examining how they are perceived by potential visitors. Is the signage self-explanatory, welcoming, and in good repair? Are the grounds and building accessible by those in wheelchairs and walkers? Is the facility inviting enough to lure potential visitors back, after an extended time away? Many smaller museums (and libraries, and other cultural facilities) are taking this opportunity to revamp their appearance and approach to the community.

These are in our view some of the most influential and exciting developments for small and community museums that we see at present, and that should be considered going forward for Norfolk museums.

B.9. Situation Analysis: Synthesis of Findings and Opportunities

B.9.1. SWOT Assessment as a Basis for Planning

A SWOT analysis can provide the basis for strategic actions – in this case, the basis for a museum sustainability plan. Different elements (strengths, weaknesses, and so on) will logically imply different types of actions and initiatives, as shown in the chart below:

	How Defined Strategically?	Strategic Actions
<i>Strengths</i>	<ul style="list-style-type: none"> • unique or very strong factors that provide current competitive advantage 	<ul style="list-style-type: none"> • protect an advantage • further develop or capitalize upon an existing advantage
<i>Weaknesses</i>	<ul style="list-style-type: none"> • areas of current competitive disadvantage relative to competition 	<ul style="list-style-type: none"> • strengthen areas of weakness • reposition to eliminate weakness (in reality, or through the creation of alternative perceptions)
<i>Opportunities</i>	<ul style="list-style-type: none"> • situations that present opportunities for future competitive advantage 	<ul style="list-style-type: none"> • feasibility testing • implementation planning
<i>Threats</i>	<ul style="list-style-type: none"> • situations that present dangers of future competitive disadvantage 	<ul style="list-style-type: none"> • risk assessment • contingency planning

This framework will be very useful in the identification of potential actions to enhance the sustainability of the museums, as well as in the selection of a preferred scenario going forward.

B.9.2. SWOT Assessment of Norfolk Museum Operations:

This SWOT framework is used below to catalogue the various factors that should be taken into account in this review. The various factors are noted below, along with an indication of where the particular theme was heard. This correspondence system is as follows:

- CS – community survey
- SV – staff and volunteer surveys
- SI – stakeholder interviews
- BR – benchmarking review
- SV – site visit
- BI – background information
- CJ – consultants judgment

Strengths	<ul style="list-style-type: none"> • museums close to the community; reflect local history and are a cause for community pride (CS, SV, SI) • programs (pre-Covid) were very engaging of the local community (CS, SV, SI) • dedicated staff and volunteers • opportunities for engagement by students, youth (CS, SI)
Weaknesses	<ul style="list-style-type: none"> • no single source to learn of the integrated history of the County (CS, SI, CJ) • collections spotty, not reflective of entire history of County (SV, SI, CJ) • lack of changing exhibits (slow turnover) (CS, SI, CJ) • diminishing County support (CS, SV, SI) • none of the buildings were purpose-built, suffer from climate control issues (SI, CJ) • negative community reaction to closures (CS, SV, CJ) • lack of awareness, leading to low attendance (CS, CJ) • perception of higher costs for museums relative to other municipalities (CS, SI) • no major museum facility in largest population centre (Simcoe) (SI) • most people not interested in museums and archives (SI)

<p><i>Opportunities</i></p>	<ul style="list-style-type: none"> • opportunity to develop one larger, iconic central museum (CS, SI) • privatization / development opportunities in Waterford, Delhi (could help fund central facility) (SI, CJ) • Archives should expand into EBD (SV) • opportunity to de-accession superfluous items / duplicate items to free up space • more rentals (CS, SI, CJ) • explore operational efficiencies (SI) • explore more partnerships and sponsorships (SI, CJ) • fundraising: some deep pockets in the County (CS, CJ)
<p><i>Threats</i></p>	<ul style="list-style-type: none"> • municipality will continue to cut back on museum operations (CS, SV, SI) • one central museum, which will erode identity of individual communities (CS, SI) • continuing lack of awareness leads to public undervaluing (SI) • continuing lack of support from both public and elected officials (CS, SV, SI) • looming infrastructure costs for deferred and future maintenance (SI, CJ) • increasing staffing costs (SI)

C. Scenarios to be Assessed

C.1. Scenarios to be Assessed

C.1.1. Range of Options Considered

A range of scenarios was to be examined over the course of this sustainability study. Outright closure of **all** museum operations was never considered an option, but further closures and some consolidation of existing operations was to be considered. Through discussion with staff (as well as the Mayor and CAO) the following suite of options for considerations was developed:

- 1. Status Quo** – retain the existing configuration of museums ‘as is’ and effect various physical and operational improvements to increase attendance and utilization.
- 2. Consolidation: Closure of One Museum:** Under this scenario, one museum would close and its collection would be housed in one of the remaining facilities. The Archives operation would remain as is, possibly expanding into the rest of the Eva Brook Donly museum (possibly with some exhibit or display commemorating the artist).
- 3. Consolidation: Closure of Two Museums:** Under this scenario, two museums would close and their collections housed in the remaining facilities (or more likely, off-site in suitable premises). De-accessioning of items in the collections would likely be required as well. As with the previous scenario, the Archives operation would remain as is, possible expanding into the rest of the Eva Brook Donly museum.
- 4. Consolidation into One Museum:** This scenario envisages that all three museums close and consolidate into one major new Norfolk County museum. The Eva Brook Donly collection might also occupy this new facility. This would be either a new build, or possible an adaptive re-use of an existing facility. A logical location for such a new central museum would be Simcoe, although this is not necessarily the only location possible. As with the other scenarios, the Archives would remain in its current location.

Clearly there are other possibilities as well – for example, the Archives might move into a central facility to have a combined museum and archives in a manner similar to Peel Region, or Wellington County. Or one of the museums might expand and relocate, while the others remain essentially as is. While these are certainly possibilities, at this high level of analysis it was felt that these four scenarios are sufficiently distinct to be able to determine a preferred path forward for a sustainability study.

C.1.2. Preliminary Assessment of Scenarios

The table below contains a preliminary assessment of each of these four scenarios. First, the core idea or ‘philosophy’ underlying each scenario is outlined. Next, the advantages or benefits of each scenario are stated in summary form, followed by the costs (risks and disadvantages). Finally, various other considerations are outlined.

Scenario Name	Scenario A	Scenario B	Scenario C	Scenario D
	Status Quo	Consolidation: 1 closure	Consolidation: 2 closures	Centralization
Core Idea	<ul style="list-style-type: none"> County continues to operate three museums and archives 	<ul style="list-style-type: none"> County closes one of the existing museum operations 	<ul style="list-style-type: none"> County closes two of the remaining museums 	<ul style="list-style-type: none"> County closes all museums and consolidates museums and archives operation into centralized facility
Benefits	<ul style="list-style-type: none"> continued museum presence in local communities possible increase in local attendance and utilization 	<ul style="list-style-type: none"> savings from closed operation could be put into remaining operations to improve their overall sustainability possible increase in local attendance and utilization 	<ul style="list-style-type: none"> savings from closed operations could be put into remaining operation to improve its overall sustainability possible increase in local attendance and utilization 	<ul style="list-style-type: none"> critical mass of having all museum /archives operations in one facility potential operating savings of having facilities in one centralized facilities potential for a new (iconic) museum presence in major population centre in County possible increase in total utilization of museum / archive facilities from new facility
Costs	<ul style="list-style-type: none"> increasing deferred maintenance costs for buildings (and at some point, requirement to spend funds) continuing operating cost increases 	<ul style="list-style-type: none"> community backlash in location where museum closed (and potentially rest of County) continuing increased deferred maintenance costs for remaining buildings (and at some point, requirement to spend funds) 	<ul style="list-style-type: none"> community backlash in location where museums closed (and potentially rest of County) continuing increased deferred maintenance costs for remaining building (and at some point, requirement to spend funds) 	<ul style="list-style-type: none"> capital costs of retrofitting building loss of local community representation of museums difficulty for those in outlying communities to attend museum (could be offset through greater outreach activities)
Other Factors	<ul style="list-style-type: none"> probably longer-term funding agreements tied to targets and outcomes would need to be put in place for continued operation 	<ul style="list-style-type: none"> redevelopment of Delhi site could provide funds for improvements in remaining operations 	<ul style="list-style-type: none"> redevelopment of prime Waterford site could provide funds for improvements in remaining operations (possibly with museum displays on first floor) possibility for commercial redevelopment of other sites (e.g., themed restaurants) 	<ul style="list-style-type: none"> redevelopment of prime Waterford site could provide funds for improvements in remaining operations new modern museum operation in a prime adaptive (iconic) re-use could become major branding symbol for a 'New Norfolk'
		<ul style="list-style-type: none"> community groups might take on maintenance of displays of local history under auspices of County (like Lynnwood Arts Centre operation) 		

Collections Storage Scenario

Another element to be considered is the need for proper storage and a collections facility for the museums. This is an additional need not completely captured in the consolidation and closure scenarios previously discussed. On the one hand it is recognized that there is a need for proper storage for certain items in the collection; the artifacts from the Teeterville Pioneer Museum as well as those from the Eval Brook Donly Museum. There are also artifacts at the other operating museums that are housed in less-than-ideal storage conditions. As well, in future there will be storage needs for additional items collected by the museum program. These all spell the need for additional proper storage. On the other hand, it is recognized that there is some duplication in the current combined collections of the museums, and that there could be some savings in storage requirements if de-accessioning and disposition of some items were undertaken. The development of a comprehensive collections policy and the resulting review of the current collection (recommended as part of this sustainability strategy) will determine the exact nature and size of the facility required.

In one or more of the ‘consolidation’ scenarios discussed above, there could possibly be room freed up for collections storage. Alternatively, or additionally, storage space could be leased elsewhere (for example, at a self-storage location, which is a direction taken by certain other community museums). A specific solution will need to wait until the development of the collections policy and the subsequent assessment of the existing collections.

C.2. Detailed Evaluation of Scenarios

C.2.2. Operating Implications

The operating implications of each of these scenarios at a high level are outlined in the table below. Several key aspects are staffing, other operating costs, capital costs, attendance and utilization, revenue generation, and partnerships potential.

Scenario	Scenario				
	Enhanced Status Quo	Consolidation: 1 closure	Consolidation: 2 closures	Centralization	Collections / Curatorial Facility
Staffing	existing staff complement continues; possible some growth in longer term	some staff savings (estimate 1 position)	some staff savings (estimate 2 positions)	additional staff required (estimate 2 positions)	additional staff required (estimate 1 position)
Other Operating costs	same as current (with incremental growth assumed)	some operating costs savings (dependent upon facilities closed)		likely some operating cost increase (savings from closures more than likely offset by additional costs of operation for new facility)	Some increase in operating costs for new facility (or leasing costs if commercial space)

Capital Costs	modest capital cost requirements for improvements (over and above those already earmarked in capital budget – see Section 1)	some capital cost savings in terms of items in capital budget that will no longer be needed – however, note that County will still have obligation to maintain facilities to some standard	major capital cost implication (see next Section)	possibly some capital cost implication (see next Section) unless space is leased
Collections	collection continues slow growth after some de-accessioning (after development of collections policy)	possibly reduced need for collections with fewer facilities	likely major increase in collections intensity	
Attendance and Utilization	attendance returns to pre-pandemic levels; slow growth thereafter (unless additional aggressive marketing)	diminished attendance (depending upon which facility closes)	spike in attendance in initial years, reflecting novelty and interest; levelling off to levels equal to or possibly below existing collective attendance	N/A
Fundraising and Revenue Generation	slight increase in revenues with higher admission rates, greater event rentals, and more active fundraising	reduced overall revenue generation potential with closed venue and impression of reduced importance of museums	significant revenue generation potential with higher admission rates, greater event rentals, and more active fundraising (capital and operating)	possibly some potential to sell storage and curatorial services to other local agencies or other municipal museums
Partnership Development	possibility for more active partnership development; potential partners see themselves as part of an overall sustainability strategy	reduced overall partnership potential with closed venue and impression of reduced importance of museums	significant additional partnership potential with major new facility	Limited partnership potential other than like-minded historical organizations; possibly other museums

C.2.3. Financial Comparison of Scenarios

C.2.3.1. Operating Costs

The table below outlines operating cost implications of the various scenarios outlined. Note that because specific scenarios are not highly detailed (i.e., **which** facilities may close, **which** staff positions might be eliminated) the estimates below are necessarily high-level and order-of-magnitude only in nature. They are indicative of the relative cost savings, or additional costs,

of the scenarios. More specific and detailed assumptions would need to be developed to determine more definitive estimates. Nevertheless, for the purposes of this assessment, they will suffice.

Scenario	Scenario				
	Enhanced Status Quo	Consolidation: 1 closure	Consolidation: 2 closures	Centralization	Collections / Curatorial Facility
Assumptions	<ul style="list-style-type: none"> - existing staff complement continues; possibly some growth in longer term - existing operating costs continue 	<ul style="list-style-type: none"> - eliminate 1 position (say \$70K) - shutter one facility (estimated as 15% of non-salary savings) 	<ul style="list-style-type: none"> - eliminate 2 positions (say \$140K) - shutter two facilities (estimated as 30% of non-salary savings) 	<ul style="list-style-type: none"> - add 2 positions (say \$140K) - assume operating costs of new facility equal to twice current non-staff operating costs (higher costs with new facility) 	<ul style="list-style-type: none"> - add 1 position (say \$70K) - add minimal operating costs for new facility (say, equal to staffing costs)
Resulting Annual Operating Cost (high-level)	\$1.8 million	<ul style="list-style-type: none"> - savings of \$183,000 annually = budget of \$1.6 million 	<ul style="list-style-type: none"> - savings of \$366,000 annually = budget of \$1.4 million 	<ul style="list-style-type: none"> - additional staff costs of \$140K - additional non-staff operating costs for new facility = \$750K million = total budget of \$2.7 million 	<ul style="list-style-type: none"> - add \$140K to other scenarios if collections facility added

The analysis below considers the existing utilization of space at the museums, and the implications for both a new centralized museum facility as well as a new collections/curatorial facility.

C.2.3.2. Capital Costs of New Facilities

The table below shows the utilization of space at the four museums. As it shows, there is a great deal of variation in the ‘gross to net’ ratio of space (the ‘net’ figure showing the space usable for museum purposes at each facility). A reasonable norm for museum facilities is a 30% gross up factor (meaning that 71% of the total space in the facility is used for museum purposes and 29% for building utilities and functional aspects of operating the space¹²). A lower gross up factor implies a more efficient building in terms of more of the overall space being allocated to museum functions.

Waterford is thus the most efficient of the museum facilities, with an 11% gross up factor, and the Archives and Eva Brook Donly facility the least efficient, with an overall gross up factor of over 1.5. Combining all the space in all facilities, the overall gross-up factor is about 30%.

¹² For example, if the ‘museum area’ was 10,000 square feet, then with a 30% gross up factor the entire building envelope would be 13,000 square feet (i.e., 10,000 times 1.3). This would result in a building where 10,000 of the 13,000 square feet of the total footprint (i.e., 77%) would be the ‘museum part’ and the remaining 23% (3,000 square feet) would be the ‘functional building’ part.

For illustrative purposes if all the museums were consolidated into one facility (either a new build or an adaptive re-use of an existing facility, were one to be found) the total net space requirements are estimated to be on the order of 29,000 square feet, which at a 30% gross up factor would require a building of approximately 38,000 square feet. This is less than the nearly 51,000 square feet currently occupied by the museums, reflecting economies of scale and greater efficiencies of operation. The table shows at a very high level the utilization of space for the main functions of exhibitions, collections, staffing space, etc.

A very rough estimate of the capital costs associated with a new build of this order of magnitude might be as follows:

- building construction and interior fit-up (38,000 square feet @ \$500 per square foot) = \$19.0 million)
 - furnishings, fixtures and equipment allowance @ 10% of construction costs = \$1.9 million
 - exhibits (15,000 square feet at \$300 square foot) = \$4.5 million
 - soft costs (25% of above amounts) = \$6.3 million
- Total = \$31.7 million**

This estimate of course does not take into account any cost of site acquisition (if the facility were not built on County-owned land), site servicing and site work, escalation, and contingencies.

The costs of an adaptive re-use could be in the same order of magnitude, or more, depending upon the exact nature and condition of the structure to be renovated. (Often, because of the more rigorous environmental requirements for museum spaces, adaptive re-use options can be more expensive than a new build.)

The need for a collections storage / curatorial centre has also been noted. Taking the same high-level approach as with a new centralized facility, we can estimate costs of a new build as the following:

- building construction and interior fit-up (8,500 square feet [rounded] @ 400 per square foot) = \$3.4 million)
 - furnishings, fixtures and equipment allowance @ 15% of construction costs = \$0.5 million
 - exhibits (15,000 square feet at \$300 square foot) = \$4.5 million
 - soft costs (25% of above amounts) = \$1.0 million
- Total = \$4.9 million**

As with a new facility, this estimate of does not take into account any cost of site acquisition (if the facility were not built on County-owned land), site servicing and site work, escalation, and contingencies.

Space Allocations at Existing Facilities, and Estimated Space Requirements for New Facilities

Defined Space	Delhi	Port Dover	Waterford	Archives	Eva Brook Only	Total	Centralized Museum	Centralized Curatorial Facility ⁽⁴⁾
Exhibition Space	5,500	3,400	8,800	400	1,600	19,700	15,000 ⁽¹⁾	0
Staff Space	700	400	1,000	700	0	2,800	1,500 ⁽²⁾	750 ⁽⁵⁾
Storage - Collections/Archives	700	600	6,200	2,800	800	11,100	9,000	5,000
Storage - Other	0	1,100	300	0	0	1,400	1,000	700
Visitor Amenities	500	200	800	1,600	0	3,100	2,000	0
Gift Shop	0	200	400	0	0	600	400	0
Net Area	7,400	5,900	17,500	5,500	2,400	38,700	28,900	6,450
Gross Area	10,900	8,000	19,500	8,400	3,700	50,500	37,712 ⁽³⁾	8,417 ⁽⁶⁾
<i>Difference Factor</i>	<i>1.47</i>	<i>1.36</i>	<i>1.11</i>	<i>1.53</i>	<i>1.54</i>	<i>1.30</i>	<i>1.30</i>	<i>1.30</i>

Notes

(1) Interior exhibit space only considered, however exterior spaces should be considered if the site permits.

(2) Assumes 300 sf for workshop and 1,200 sf for staff space for 12 staff

(3) Assumes the following: A) includes all of the Archives existing space less 50% of archive room#3, plus 25% for future growth; B) other collections consolidated will have to be assessed and reduced to find efficiencies – plus compact storage solutions may be considered; and C) includes Teeterville collection.

(4) Assumes that the Archives remain in current location and Eva Brook Donly collection moved to curatorial centre

(5) Includes space for workshops and 4-6 staff.

(6) Assumes the following: A) all small storage from Waterford, Delhi, Eva Brook Donly and portions of Port Dover are consolidated; and B) includes Teeterville collection.

C.2.3.3. Capital Costs of Refurbishment

A high-level estimate of the budgets for refurbishment of the museums suggested by the facility reviews is contained below. This identifies the types of improvements that are suggested, outlines specific cost assumptions regarding each, and the resulting high-level estimates of cost. It must be emphasized that these are very preliminary order-of-magnitude costs that must be further refined once specific decisions for each facility have been made.

Waterford Heritage and Agricultural Museum

<i>Types of improvements to be made</i>	<ul style="list-style-type: none"> - Refurbishment of exhibits - Maintenance and improvement of site - Incorporation of some interactives in exhibits
<i>Specific assumptions made</i>	<ul style="list-style-type: none"> - Assume half of exhibit area (4,400 sf) refurbished over 5 years
<i>Resulting capital cost estimate</i>	<ul style="list-style-type: none"> - At \$300 sf, this implies a refurbishment budget of \$1.3 million - Also allocate budget of \$100,000 for exterior site improvements - Total refurbishment budget of \$1.4 million - Soft costs for above estimated at 25% of costs - Total budget = \$1.75 million - Suggest spreading this out over a 5-year period = \$350,000 per year

These cost estimates assume that the existing facility is refurbished. Before doing this, however, our recommendation is that the redevelopment potential of the site be assessed with the development community, and the possibility of the museum being relocated in Waterford using part of the County proceeds from the development, be explored. Another possibility is that all or part of the first floor of the redeveloped site be devoted to the museum. In either of these cases, the capital costs would need to be separately estimated.

Port Dover Harbour Museum

<i>Types of improvements to be made</i>	<ul style="list-style-type: none"> - Refurbishment of Aldimart (possibly separate fundraising project) - Wheelhouse improvements - Improvements to indoor programming space
<i>Specific assumptions made</i>	<ul style="list-style-type: none"> - Assume one-quarter of exhibit area (850 sf) refurbished over 5 years
<i>Resulting capital cost estimate</i>	<ul style="list-style-type: none"> - At \$300 sf, this implies a refurbishment budget of \$255,000 - Also allocate budget of \$100,000 for exterior site improvements - Total refurbishment budget for space of \$355,000 - Soft costs for above estimated at 25% of costs - Total budget = \$444,000 - Suggest spreading this out over a 5-year period = \$89,000 per year

Like the other facilities, a specific and separate refurbishment plan would need to be developed for each facility.

Delhi Tobacco Museum and Heritage Centre

<i>Types of improvements to be made</i>	<ul style="list-style-type: none"> - Refurbishment of some exhibits, with greater explanation as to meaning and use of artifacts - More effective use of space for exhibits should be considered
<i>Specific assumptions made</i>	<ul style="list-style-type: none"> - Assume half of exhibit area (2,750 sf) refurbished over 5 years
<i>Resulting capital cost estimate</i>	<ul style="list-style-type: none"> - At \$300 sf, this implies a refurbishment budget of \$825,000 - Soft costs for above estimated at 25% of costs (= 206,000) - Total budget = \$1.031 million - Suggest spreading this out over a 5-year period = \$206,000 per year

These estimates assume that the existing facility is refurbished. However, one possibility that should be thoroughly explored before going this route would be to investigate the possibility of using a portion of the space as storage and curatorial space for the smaller artifacts from the County’s collection (including Eva Brook Donly and the Teeterville Pioneer Museum). This possibility would also explore using a smaller portion of the Delhi facility for a smaller-scale exhibition developed more to the multicultural history of the region and County, as opposed to focusing on the ‘tobacco industry’ aspect of the story (which our research showed to be unsavoury to many people). Note that it also may be possible to lease commercial storage space for artifacts where they can be kept according to proper temperature and humidity conditions, which could free up more of the space at the facility for community displays. Either way, under this scenario, the costs associated with renovation for a storage purpose would be different from those presented here (and likely somewhat less).

Norfolk County Archives

<i>Types of improvements to be made</i>	<ul style="list-style-type: none"> - Conversion of space at Eva Brook Donly space to storage for Archives and public access purposes
<i>Specific assumptions made</i>	<ul style="list-style-type: none"> - Assume costs of clearing and readying space is same as for exhibits (in reality will likely be somewhat less) - Assume all of museum space (2,400 sf) refurbished over 5 years
<i>Resulting capital cost estimate</i>	<ul style="list-style-type: none"> - At \$300 sf, this implies a refurbishment budget of \$720,000 - Soft costs for above estimated at 25% of costs (= 206,000) - Total budget = \$900,000 - Suggest spreading this out over a 5-year period = \$180,000 per year

These estimates assume that the Archives will slowly expand into the vacated Eva Brook Donly space. It is recommended also that some space (possibly a room in the house) that would be devoted to the story of Eva Brook Donly.

C.3. Preferred Scenario

The table below contains an evaluation of the various scenarios based upon a number of criteria. These include:

- operating cost savings or additional costs (from the high level analysis)
- anticipated capital costs (from the high level analysis)
- community desirability (from interviews and surveys)
- ability to protect and enhance local heritage (from community interviews surveys and consultants' judgment)
- branding and positioning of the community (from interviews and consultants' judgment)

A simple 1 to 5 rating is used, where 5 is the best possible situation and 1 is the least desirable. Each of the five scenarios is ranked as one to five, as shown below.

Scenario	Scenario				
	Enhanced Status Quo	Collections / Curatorial Facility	Consolidation: 1 closure	Consolidation: 2 closures	Centralization
<i>Operating Costs</i>	3	2	4	5	1
<i>Capital Costs</i>	3	2	4	5	1
<i>Community Desirability</i>	5	4	2	1	3
<i>Ability to Protect / Enhance Heritage</i>	4	5	2	1	3
<i>Community Branding & Positioning</i>	3	3	2	1	5
OVERALL	18	16	14	13	13

Clearly, the enhanced status quo scenario is the preferred one. 'Centralization' and 'Consolidation' each scored relatively low: in the former case because of higher costs, and in the latter because of the negative community reaction and likely impact on community image and branding. Accordingly, the 'Enhanced Status Quo' scenario is the one around which sustainability recommendations are developed.

D. Recommendations: The Sustainability Plan

Based upon the foregoing analysis, the following recommendations are made, constituting a sustainability plan for the County's museums.

1. Enhanced Status Quo Scenario Preferred: After a review of several alternative museum configurations for the County of Norfolk, an enhanced status quo option is recommended. After consideration of a consolidation option (i.e., close down existing museums and develop a new centralized museum facility a centralized location) and closure options (where one or two of the existing operating museums closed down and consolidated in the remaining facility(ies), it was determined that the existing configuration of museums in Waterford, Port Dover and Delhi should remain in place. The Archives operation too should remain in situ in Simcoe. The reasons for this are threefold: 1) the community survey revealed that a very large majority of the population consulted (74% of nearly 700 responses¹³) desired this option and rejected further consolidation or centralization); 2) our review of the financial situation facing Norfolk showed that the County's support of museums was reasonable and in line with comparable single-tier municipalities (in fact, maybe slightly less supportive, if anything); and 3) a high-level review of costs showed that this was likely the least costly option. Note that the recommendation here is for an **enhanced** status quo option, as various physical and other improvements are recommended to each facility to improve sustainability.

2. Collections and Curatorial Facility Needed: A collections and curatorial facility is also needed as a proper storage facility for artifacts as well as a small conservation and preparation lab. The collections at the Teeterville Pioneer Museum and Eva Brook Donly Museums should be transferred and safely stored in a proper facility of this type. Future expected growth of the collection should also be a consideration. A possible location for this collections and curatorial facility could be at the Delhi Tobacco Museum & Heritage Centre. Alternatively, rented commercial space could also be considered, or a purpose-built facility.

3. Investigate Redevelopment Potential at Waterford Heritage and Agricultural Museum: Waterford is apparently a focal point for significant current development activity, as well as anticipated future growth and development. The land on which the Waterford Heritage and Agricultural Museum is currently located appears to have significant development potential. Accordingly, one option would be for the County to explore the possibility of a development on the site where part of the arrangement would be to redevelop a new museum on the first floor, or to free up the site and develop a new agricultural museum elsewhere in Waterford. It is recommended that the County investigate the potential for such a development in greater detail over the coming year.

4. Recommended Enhancements to Waterford Heritage and Agricultural Museum: If a development partnership such as envisaged in the previous recommendation is not possible, then it is recommended that a refurbishment plan for Waterford be implemented. This would

¹³ Actual total was 669.

consider a variety of improvements (further detailed in the report) such as improved signage, refurbished exhibits, etc.

5. Recommended Enhancements to Port Dover Harbour Museum: The Port Dover Harbour Museum is a unique expression of the Norfolk museum system, being the only location portraying the marine and fishing history of the County. It has the highest overall attendance and is arguably the strongest tourist attractor and economic generator of all the museums (as a result of its location in a highly populated tourist area in the summer months). As with the Waterford Heritage and Agricultural Museum, there are a variety of improvements recommended as part of a refurbishment package for the Museum, including improved exhibits and greater accessibility. Improvements to the Net Shanty are already recognized in the County's Capital Budget and should be undertaken.

6. Reposition Delhi Tobacco Museum & Heritage Centre: The Delhi Tobacco & Heritage Centre Museum sees the lowest levels of attendance and appears to be the least popular of the County's attractions. In part, this is because of the current disenchantment with the tobacco industry (even though this was a legitimate part of the history of the County and is a story that needs to be told). It is recommended that the museum be downsized (freeing up storage space for collections; see next recommendation) and rebranded to emphasize the multicultural history of the County (a story that would include, but not excessively celebrate, the tobacco history). A portion of the building could be freed up to act as a storage facility for the overall collection of the County. The remaining section of the building would feature downsized exhibits focusing to a greater degree on multicultural history.

7. Expansion of the Norfolk County Archives: We understand that the volume of materials at the Archives is growing and that this is expected to continue. Accordingly, it is recommended that once most of the artifacts are removed from the Eva Brook Donly museum (and placed into proper storage) the Archives develop a plan to expand into the space freed up. It is recommended that a small-scale exhibit devoted to EBD be developed (perhaps in a room in the house) so that there is some authentic presence remaining.

8. Update Collections Policies: The collections policies of the three museums (as well as that of the Archives) are in need of updating to ensure consistency and currency. Once done, the collections themselves need to be reviewed to ensure that they are in keeping with the updated policies, with duplicate or no longer relevant items being de-accessioned or eliminated. Ideally there would be one collections policy for the County; this may be an ideal that the County strives toward over time.

9. Rebranding of Norfolk County Museums: Each museum has a robust individual identity that is strongly associated with the communities in which they are located. The fact that they are all museums of Norfolk County may be lost on the visitor, especially tourists. It is recommended that a strong secondary tag line of *'The Museums of Norfolk County'* be adopted, and that the underlying philosophy be 'one museum in three locations'. This will help encourage the

development of an integrated story of Norfolk County, as well as encourage each museum to be a springboard for the visitor to other museums in the network.

10. Engaging and Informative Web Site: One of the common themes heard in the interviews and to some extent the community survey was that there is no one place where the entire story of Norfolk County can be seen. This reflects the fact that the museums were acquired by the County through amalgamation and that none was intended to tell the full story of the wider region. Nevertheless, this is a gap in the current provision of museum services to the County. It is impractical to recommend a physical space where this could happen, but it is recommended that the County museum web site be expanded to contain more of this type of information. This would also act in some way as a marketing vehicle to further promote the museums and build awareness and interest.

11. More Active Communications: As the museums open up post-Covid, it is recommended that an active communications plan be developed, with a strong social media and e-blast newsletter continuing (a monthly communication was initiated during the course of this work). This of course is already occurring on an occasional basis but should continue on a more regular timetable.

12. Focus on External Rental Revenue Generation: One of the benefits of the refurbishment of the three museum facilities is that they will become more attractive from the perspective of renting the facilities for special events, possibly corporate functions, etc. This form of use is frankly more useful as a means to promote the facilities to the wider community rather than a means of revenue generation per se. However, the special events attendance and usage, as well as the revenue generated, can be useful indicators of relevance and community regard. Once the recommended improvements have been made a more aggressive rentals policy should be pursued.

13. Review Admission Fees: The County should review admission fees (once museum visits again become possible) to determine the appropriate range and level of pricing. One strategy could be to explore whether admission to the museums might be made possible through a grant or donation made by a local organization or business. (The positive goodwill generated through a *“free museum admission made possible through a grant by x”* type of promotion could be very attractive to the right business or organization.)

14. Develop School Curriculum Guide: A curriculum guide should be developed/updated for local (and regional) school boards to use. The underlying purpose of this guide would be to demonstrate how the history of Norfolk County connects to the overall school curriculum outline, and thus to the broader world. Insofar as school group usage is a key metric showing relevance and utility for the museums, this should be a priority.

15. Consider Fundraising Strategy: The improvements suggested for the various facilities are fairly modest in scale. Some projects (such as a curatorial centre at the Delhi Tobacco Museum) have perhaps larger impact value than other more modest exhibit improvements, and may

attract the interest of local philanthropists and patrons with an interest in the history of the County. (Several of the stakeholder interviews suggested that there may be 'deep pockets' in the County with an interest in this kind of support.) If the County feels it cannot fund the necessary improvements on its own, then the feasibility of a fundraising strategy should be explored.

16. Engaging Programming: Also, as the museums open up after Covid, the types of programs and events offered at the museums will pick up as well, approaching the full suite of activities as was being offered before the pandemic. When returning to these activities, the museums should consider engaging the community in perhaps more challenging topics as well, such as Indigenous issues, de-colonizing initiatives, the involvement of BIPOC and other marginalized persons in the life of the County, etc. The experience of other community museums has shown that they are increasingly expected to bring these sorts of issues to the community, and can be thought leaders in this regard.

17. Partnership Development: Partnerships are not only a means of obtaining resources for projects of mutual benefit but they are also a measure of community interest and involvement. Partnerships with solid local organizations and businesses demonstrate relevance and credibility. The museums should explore the development of a wide range of partnerships throughout the County.

18. Consider Additional Staffing: At some point, the Museums of Norfolk County will require additional staff support to return to and surpass the levels of engagement seen in the past. When target measures of relevance such as general attendance, special events, partnership development, revenue generation, membership distribution (e.g., as measured by the size of a mail list) are trending upwards than that is a positive sign that additional staffing and volunteer support will be required to continue the momentum.

19. Establishment / Reinstatement of Community Advisory Boards: Local advisory boards should be reinstated for each of the three museums. The CABs would have a dual role: 1) on the one hand to advise the County on the kinds of programs and events that would have traction with local communities and the wider County (or to act as a sounding board for such ideas from Heritage and Culture staff) and 2) to act as a local ambassadors for the museums, to encourage attendance and volunteerism. The role of these CABs should be specified through a simple MOU and should be appointed by Council. It should be clear that these organizations would not have a governance role but rather a purely advisory function.

E. Next Steps

E.1. Implementation Plan

E.1.1. Timeframe for Action

This sustainability plan is envisaged to occur over a 5-year period. There are three time periods envisaged:

Short-term: the year 2022

Medium-term: 2023 and 2024

Longer-term; 2025, 2026, and beyond

The Gantt chart below shows the suggested timeframe over which the sustainability plan recommendations contained herein might be implemented.

Recommendation	Short-Term (2022)	Medium-Term (2023 – 2024)	Longer-Term (2025+)
1. Pursue Enhanced Status Quo Option			
2. Collections and Curatorial Facility Needed			
3. Investigate Redevelopment Potential at Waterford Heritage and Agricultural Museum			
4. Recommended Enhancements to Waterford Heritage and Agricultural Museum			
5. Recommended Enhancements to Port Dover Harbour Museum			
6. Reposition Delhi Tobacco Museum & Heritage Centre			
7. Expansion of the Norfolk County Archives			
8. Update Collections Policies			
9. Rebranding of Norfolk County Museums			
10. Engaging and Informative Web Site			
11. More Active Communications			
12. Focus on Special Events Revenue Generation			
13. Review Admission Fees			
14. Develop School Curriculum Guide			
15. Consider Fundraising Strategy			
16. Offer Engaging Programming			
17. Partnership Development			
18. Consider Additional Staffing			
19. Establishment / Reinstatement of Community Advisory Boards			

E.1.2. Detailed Implementation Plan

The following charts provide a detailed implementation framework for the sustainability plan developed here. Each of the recommendations is detailed in terms of roles and responsibilities; resource requirements; and targets, milestones and outcomes.

Resource Requirements Chart

Recommendation	Roles and Responsibilities	Resource Requirements		Targets, Milestones, Outcomes
		Human	Financial	
1. Pursue Enhanced Status Quo Option	Council decision; Community and Emergency Services Dept. implementation	costs contained within subsequent recommendations		maintenance of existing configuration
2. Collections and Curatorial Facility Needed	Heritage and Culture	supervisory and administrative time on part of staff	possibly some budget required to hire architects (\$25 - \$40,000)	determine resolution of collection storage issue by end 2022
3. Investigate Redevelopment Potential at Waterford Heritage and Agricultural Museum	Planning and Development (lead) working closely with Heritage and Culture	some time for consultation and analysis	minimal	firm decision on direction by end of 2022
4. Recommended Enhancements to Waterford Heritage and Agricultural Museum (pending decision from Recommendation #2)	Heritage and Culture	administration and planning time on part of staff	previously estimated as \$607,500 in County capital budget and an additional \$1.75 million for refurbishment (spread out over several years)	have refurbishment plan in place by 2023 (assuming Recommendation #2 not successful)
5. Recommended Enhancements to Port Dover Harbour Museum	Heritage and Culture	administration and planning time on part of staff	previously estimated as \$243,400 in County capital budget and an additional \$444,000 million for refurbishment (spread out over several years)	have refurbishment plan in place by 2023
6. Reposition Delhi Tobacco Museum & Heritage Centre	Heritage and Culture	administration and planning time on part of staff	previously estimated as \$172,000 in County capital budget and an additional \$1.03 million for refurbishment (spread out over several years)	have refurbishment plan in place by 2024
7. Expansion of the Norfolk County Archives	Heritage and Culture	administration and planning time on part of staff	previously estimated as \$398,000 in County capital budget and an additional \$900,000 for refurbishment (spread out over several years)	have expansion plan in place by 2024

Recommendation	Roles and Responsibilities	Resource Requirements		Targets, Milestones, Outcomes
		Human	Financial	
8. Update Collections Policies	Heritage and Culture	significant time commitment on part of curators (likely 1 day / week over a year)	minimal	have update and approved collections policy on place by 2023
9. Rebranding of Norfolk County Museums	Planning and Development (lead) working closely with Heritage and Culture	some time for consultation and analysis	likely minimal	end of medium-term (2024) and into longer-term
10. Engaging and Informative Web Site	Heritage and Culture working closely with County communication staff	some time for dialogue, consultation and analysis	likely minimal – contained within existing budget	end of medium-term (2024) and into longer-term
11. More Active Communications	Heritage and Culture	staff time – 1-2 days per month	minimal	already underway and will continue
12. Focus on Special Events Revenue Generation	Heritage and Culture	staff time – 1-2 days per month	time spent developing events will be offset by exposure and revenue	more active events program in middle-term (by 2023) and on
13. Review Admission Fees	Heritage and Culture	staff time – 3-5 days to research and write policy	minimal	revised fee structure in place in medium-term
14. Develop School Curriculum Guide	Heritage and Culture	staff time – 2-3 days to research and write guide	minimal	in place by 2023
15. Consider Fundraising Strategy	Heritage and Culture – possibly with Planning and Development	some time for consultation and analysis	possible professional assistance should be brought on board – costs \$25,000 - \$50,000	in place by 2023 (if needed)
16. Offer Engaging Programming	Heritage and Culture	On-going aspect of job description of curator's responsibility	Possibly some out-of-pocket associated with programming – TO BE DETERMINED	in place by 2023/24

Recommendation	Roles and Responsibilities	Resource Requirements		Targets, Milestones, Outcomes
		<i>Human</i>	<i>Financial</i>	
17. Partnership Development	Heritage and Culture	time invested in identifying and working with community partners	dependent upon nature of partnership involved – any one may require budget but there should be a quid pro quo return on investment	aim to develop 1-2 new partnerships each year in medium - term
18. Consider Additional Staffing	Heritage and Culture; County Council to approve	time spent by existing staff to develop job positions; recruit & train	salary implications: depending upon level, experience, etc.	have in place in medium term (end of 2023)
19. Establishment / Reinstatement of Community Advisory Boards	Heritage and Culture; County Council to approve	time invested in identifying and Community Advisory Boards	minimal	have in place in medium term (end of 2023)

E.2. Immediate Next Steps

There are several immediate next steps within the overall purview of this Sustainability Plan that are recommended. (By 'immediate' it is recommended that these be undertaken as soon as possible in 2022 – certainly within the first six months.)

- County Council should receive this report and endorse it in principle (which means endorsing the overall direction of the 'enhanced status quo' option)
- the Report should be referred to staff to come back to Council with specific recommendations regarding more detailed implementation
- Community Development, with Heritage and Culture, should begin exploring developer interest in the Waterford Museum site, with the explicit understanding that part of any new development would be the relocation and funding of a new museum **in Waterford**
- the development of refurbishment plans for Port Dover and the Archives should begin (note: the actual refurbishment actions themselves will take place over a longer time period – into the medium and longer-term)
- a renewed integrated Collections Policy should be developed. Once done, a more thorough assessment of the needs of the County, and the utility of a Collections /Curatorial centre, as recommended in this Report, should be undertaken. (This 2 is not likely possible within the first six-month period).

At the conclusion of six months (say around the end of June 2022) a progress report to Council should be made along with any adjustment to the implementation of this Sustainability Plan to realize new opportunities that may have arisen, or contingency factors that are evident by that time.

E.3. Conclusion

Norfolk County has a rich legacy of community museums that collectively tell a wonderful and integrated history of the area. The museums have undergone a good deal of change over the past two years due to financial pressures experienced by the County and then the global pandemic hit causing further disruption.

This research has showed that the community museums are intensely desired assets in the County, as shown by the various interviews and surveys undertaken. When Norfolk County is compared to similar municipalities, the levels of support offered to museums is, if anything, slightly below the average on various standardized measures.

This Sustainability Plan suggests a variety of measures to re-invest in the County's museums, recognizing their value as community assets and the legacy that they will offer to future generations. It also suggests a number of measures to demonstrate that this investment will indeed have a positive return to the community in terms of attendance, utilization, earned revenues, social media visits, and community pride.

One of the measures of a successful community with a high quality of life is the degree to which it treasures its past, and uses it as social capital to build a more cohesive and equitable society. With this Sustainability Plan, Norfolk is demonstrating that it is among these progressive and forward-looking municipalities.