



## 2017 DISCUSSION PAPER

### ABSTRACT

Trends, issues and the current state of government support for culture and creative industries in Manitoba.



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# Part A – Introduction and Overview

# 1. Introduction

It's no secret that culture matters – and matters greatly – in Manitoba. Manitoba is well-known for producing arts of national, and even global significance. Our cultural community speaks to our sense of identity, expresses our uniqueness, and reflects our history. It entertains and delights us, unsettles and challenges us, and helps us to think, to heal, to learn and to reflect. Manitoba culture adds to our quality of life and is part of the reason many people make this place their home.

Our society as a whole is in a period of transformation and change and the role of culture is growing rapidly. New communication channels are allowing for an explosion of creative expression, and creative industries are impacting all sectors. Culture plays a central role in advancing intelligent communities, sparks innovation, and is a strong vehicle for social progress and personal growth.

Culture is an economic powerhouse, employing tens of thousands of people across a wide variety of creative and cultural sub-sectors. Its contribution to the province's GDP, at \$1.7 billion, is larger than it has ever been, and it is one of our fastest growing industrial sectors.

## A New Culture Policy for Manitoba

In this wave of change, the Province of Manitoba is building a new Culture Policy. The purpose of this policy will be to:

- **Clarify** what the province is trying to achieve and what principles will guide the changes

- **Coordinate** activities within government and with stakeholders, to align our efforts and support consistency
- **Influence** and guide us, provide direction and focus on our priorities, and ensure Manitobans continue to benefit from all the social and economic benefits of culture.

This discussion paper is organized into three parts:

### Part A: Introduction and Overview

- Introduction
- The Importance of Culture
- Major Issues Impacting Culture Today

### Part B: Sectors of Cultural & Creative Industries

- The Arts
- Creative Industries
- Heritage
- Public Libraries

### Part C: Pan-Industry Interests

- Indigenous Culture
- Cultural Infrastructure

## Share your ideas!

The Manitoba government wants to hear from all Manitobans, whatever your current involvement with culture may be. Your voice will help ensure Manitoba's Culture Policy can reflect the insights, needs, interests and priorities of Manitobans.

This discussion paper includes information on culture in Manitoba, considerations and trends, as well as questions to start the discussion. Help us understand your priorities for culture and tell us how Manitoba can best support a thriving culture scene in our province.



## Help create a new Culture Policy for Manitoba!

# 2. The Importance of Culture

## Intrinsic Benefits

Throughout much of the 20<sup>th</sup> century in Canada, government support for culture was based on the idea that culture has value in and of itself; that is, it has significant *intrinsic* value. The personal benefits that individuals experience from cultural participation were seen to be reason enough to justify public investment. Gradually in the 1970s and 1980s, this conversation shifted to one in which government support for culture became increasingly focused on the ways that culture acts as an *instrument* in achieving other public benefits, such as improved health outcomes or increased economic growth. The attraction of instrumentalism is that it is more measurable than intrinsic benefits, and it is much more easily linked to public policy objectives.

Recently, there has been a resurgence in recognizing the importance of the intrinsic value of culture, that is, the private experience of finding pleasure, inspiration, or meaning in cultural activity. The Arts and Humanities Research Council of England's recent report, "Understanding the Value of Arts and Culture" notes that the benefits of cultural engagement lie in its ability to "help shape reflective individuals, facilitating a greater understanding of themselves and their lives, increasing empathy with respect to others, and an appreciation of the diversity of human experience and cultures." (Arts and Humanities Research Council, 2016) Individuals seek out cultural experience for intrinsic reasons, for joy,

for captivation, and for building greater self-awareness.

Naturally, the intrinsic value of culture is not entirely felt in the private realm. As individual improvement accrues from cultural experience, this experience in turn "may produce engaged citizens, promoting not only civic behaviours such as voting and volunteering, but also helping articulate alternatives to current assumptions and fueling a broader political imagination. All are fundamental to the effectiveness of democratic political and social systems. Arts and cultural engagement helps minority groups to find a voice and express their identity. They can engage people in thinking about climate change when used not didactically but as a basis for reflection and debate." (Arts and Humanities Research Council, 2016). In other words, the power of culture in fostering understanding, empathy and insight is a critical factor in the formation of an individual's understanding of his or her place in the community.

Individuals seek out cultural experience for intrinsic reasons, for joy, for captivation, and for building greater self-awareness.



*Courtesy of the Winnipeg Art Gallery*

A recent study titled, “Gifts of the Muse” (McCarthy, Ondaatje, Zakaras, & Brooks, 2004) called this the “spillover effect,” in which the private benefits of culture contribute to the public good. The lesson here is that government support for culture should not be based only on culture’s ability to advance broad social and economic policy objectives, even when those benefits are clearly demonstrable. Our motivation for supporting culture must also come from finding value in the deeper impacts of cultural experience, as it fosters our ability to question creatively, tell our stories, understand our past, imagine our future, and build a vision of who we are as individuals and as a society.

### Instrumental Benefits

All that said, the ways in which a thriving cultural sector acts as an instrument in achieving other public benefits are well-documented, thoroughly researched and deeply understood.

#### *Culture and Learning*

In education, arts experiences strengthen early childhood literacy, student problem-solving and critical thinking skills, adding to overall academic achievement, school success, and preparation for the workforce. Cultural activities have been linked to increased

graduation rates among lower-income students (Arts Council England, 2014). Recent reviews have further suggested that arts participation has its strongest effects on learning processes, problem-solving, and other transferable skills, while effects on improvements in discrete subject-area scores have been proven to be less pronounced. Cultural participation positively contributes to habits of mind that support learning, as well as self-confidence, motivation and pro-social behaviours. (Arts and Humanities Research Council, 2016)

#### *Benefits to Youth*

Among youth, cultural engagement enhances academic achievement, builds self-confidence and resiliency. Arts and cultural experience helps young people acquire skills needed to succeed in the knowledge economy. A thriving cultural environment also helps retain young people in the province by providing an exciting place to live and raise a family.



#### *Health and Wellbeing*

Since the 1980s a large body of research has clearly established the link between cultural participation and health (Hill, 2015). Research has shown that a higher degree of engagement with arts and culture leads to a higher level of subjective well-being (Arts Council England, 2014).





Some of the most striking findings have been seen with respect to the effects of cultural participation among the elderly. Studies have shown that participation in cultural activities have led to reports of improved physical well-being and higher degrees of social inclusion (Phinney, et al., 2012). Structured cultural programming among seniors has also been found to result in better health, with “fewer doctor visits, less medication, positive responses on mental health measures, [and] increased social engagement” (Hill, 2015). Improvements in physical and mental health also include positive effects on dementia, especially when activities include storytelling and engage older adults’ creative capacities. (Arts and Humanities Research Council, 2016).

### Community Vitality

Culture plays a significant role in the vitality and regeneration of cities. Cultural infrastructure, heritage preservation, public art, and community engagement in cultural activities become part of what represents a community’s identity, and adds to a sense of belonging.

The built environment, including historic and modern buildings and streetscapes, is often represented in images of a community. It is also the setting for community activity and interaction, and becomes connected with personal memories in a space. Public art can create cohesion in an area, representing the community and continuing historic significance while enabling new development.

Investments in cultural infrastructure can inject new life and activity in areas that have been in decline. Art and music animate public spaces, and create a draw for people to congregate. Visual arts can deliver a commentary about significant events, social concerns or simply an aesthetic that in itself may convey insight into the people of a given time and place.

### Economic Impact

Culture is an important economic driver in the Province of Manitoba. In 2014 it was responsible for \$1.7 billion, or 2.9% of Manitoba’s total GDP, and provides direct employment to 22,000 Manitobans, or 3.3% of Manitoba’s workforce (Statistics Canada, 2016).

Manitoba’s total Culture GDP increased by 23% from 2010-2014, growing twice as fast as the overall Manitoban economy.

In terms of importance to our economy, culture exceeds other sectors such as agriculture, forestry, fishing, and hunting; electric power generation, transmission, and distribution; food manufacturing; and accommodation and food services.

**Cultural industries are directly responsible for 2.9% of Manitoba’s GDP.**

A survey for the Winnipeg Arts Council Report *Ticket to the Future* (PRA, Inc., 2009) suggested even higher employment. It reported 6.3% of Winnipeg’s labour force (25,000 people) is employed in the arts and creative industries. 5,400 of these people are employed by non-profit arts and cultural organizations. This study was updated in 2014, and reported that between 2009 and 2012, the arts and creative industries outpaced the overall growth in GDP and employment in Winnipeg, such that the sector accounts for about 3.7% of the City’s total output, and 6.4% of its employment (PRA, Inc., 2014).

The economic value of cultural industries has been researched globally since the 1990s. A UNESCO report summarizes this research as indicating that “cultural and creative industries



generate a high growth rate of GDP and employment, [and] have some of the characteristics of a leading sector that can generate growth of the overall economy. Some sectors can provide spillover effects for the economy and help attract a high-quality workforce, business and investment”. The report observed that in many analyses, the cultural sector or creative industries were seen as one of the few areas where dynamic economic development might be expected, spurring creativity and innovation across the economy as a whole (UNESCO, 2012).

This spillover effect was also reported by the Cultural Human Resource Council of Canada. “The inherent creativity of the cultural sector is more frequently integrated with other industrial sectors such as medicine or engineering, leading to new approaches to production, distribution

or marketing. Increasing synergy between the Information and Communications Technology sector and the cultural sector is generating new businesses that ultimately view the world as their markets. As the Canadian economy continues to move toward a knowledge-based economy, the creativity exhibited by the cultural sector will only increase in importance” (CHRC, 2011).

Companies and workers in the culture sector produce and distribute creative products and services that not only have local impact, but a national and global reach as well. Government investments in culture support positive impacts on GDP, tax revenue and job growth, and the market potential is growing for all creative industries.





### 3. Policy Considerations

Globally there are a number of trends that are impacting all areas of culture. The most prevalent include the fiscal environment in the public sector, the rise of digital technologies, demographics and diversity.

#### Demographics and Diversity

Diversity, cultural equity and inclusion have received growing attention across all areas of public policy in developed countries in recent years, including Canada. These topics are also highly relevant in the cultural and creative industries. While definitions vary, the most commonly studied elements of diversity include age, race, culture, socioeconomic status and ethnicity (Mauldin, Kidd, & Ruskin, 2016). Expanding accessibility legislation has also increased the attention on diversity related to physical and cognitive abilities. *The Accessibility for Manitobans Act* became law in December 2013. It defines mandatory accessibility standards to address barriers for Manitobans in key areas of daily living.

While specific data on Manitoba is not available, international research provides some insight for consideration in development of a provincial cultural strategy.

A review of studies in the US found boards, employment, audiences and programming in the arts are less diverse than the population of the country, in fields from museums to publishing to theatre (Mauldin, Kidd, & Ruskin, 2016).

Research in the UK (The Warwick Commission, 2015) has shown that a high percentage of participation in publicly funded cultural activities is by the wealthiest, better educated and least ethnically diverse segments of the

population. Other evidence suggests this is not caused by a lack of demand among the public for cultural and creative expression. For example, films, television and radio continue to find extensive audiences across all age, gender and social groups. The Warwick Commission has suggested that low engagement may stem from a mismatch between the public's taste and the publicly funded cultural offer.

Study in issues of diversity and inclusion continues to evolve, and many different points of view are emerging. Better data and common definitions are needed to allow comparisons over time and between jurisdictions. Understanding what matters is also important such as whether diversity should be considered within individual organizations, within various disciplines, or across a jurisdiction as a whole (Mauldin, Kidd, & Ruskin, 2016).

In Manitoba, this means the rich range of voices, experiences and talents of our population may not be equally expressed, represented or developed in our cultural and creative industries. This lessens the ability of individuals to gain value from cultural engagement and creative expression, and our ability as a province to capture the full potential of cultural and creative growth.

Beyond assisting access to programs, it becomes important to consider how to enable participation and ownership in the design and delivery of programs as well to ensure both relevance and accessibility across Manitoba's entire population.

An overview of key elements of Manitoba's population follows below.

### Population

Manitoba's population in 2011 was 1.2 million, an increase of 8% since 2001 (Statistics Canada, 2011). Manitoba is somewhat unique in Canada, in that over 60% of the population is in the Winnipeg census metropolitan area. In 2011, 6% of the population resided across the vast geography of northern Manitoba (Government of Manitoba, 2015).

### Age Profile

Similar to national trends, the Manitoba population is aging. In 2011, the median age in Manitoba was 38.4 years, compared to 33.0 years in 1991. Seniors make up the fastest growing age group. This trend is expected to continue for the next several decades due to small family sizes, increasing life expectancy, and the aging of the baby boom generation.

Manitoba's population remains slightly younger than the national average, with 13.9% of the population 65 and over, compared to 14.4% nationally. This is projected to increase to 16.1% by 2020 (MBS, 2015).

Manitoba's population is not uniformly aging, however. The Indigenous population is younger than the non-Indigenous population. According to the 2011 National Household Survey, the median age for Indigenous people was 24.4, compared to 40.7 for the non-Aboriginal population. (Statistics Canada, 2011)

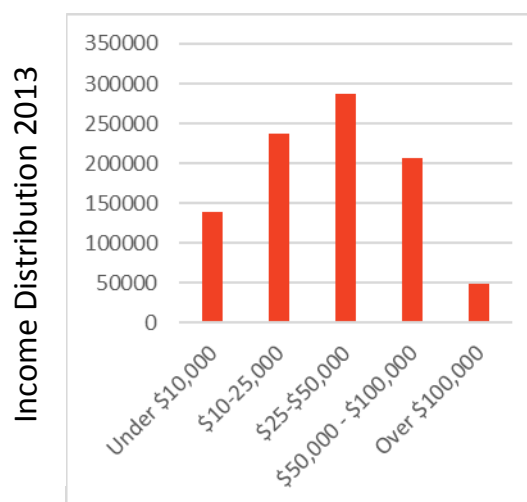
### Income and Education

Manitoba's overall economy is relatively stable, showing an average annual growth of 2.5% from 2010 to 2014. The Manitoba population has somewhat lower education and income levels than in Canada as a whole.

In 2011, 53.6% of Manitobans aged 25 or older had completed some form of post-secondary education, compared with 59.6% nationally.

Similar to national trends, levels of education are changing over time. In 2011, almost 70% of adults 25-44 in Manitoba had completed post-secondary education compared to about a third of those aged 65 years and over (Statistics Canada, 2011).

The median family income has remained relatively consistent from 2009-2013 at 4-5% below the national average (Statistics Canada, 2015).



While the proportion of the population earning half or less than the national median in 2011 (25.4% vs 25.0%) is similar to national figures, Manitoba has a smaller percentage of high income earners, with only 7.2% of people earning \$80,420 or over (representing the top 10% nationally) (Statistics Canada, 2011).

### Ethnicity

Indigenous people represent a strong and growing segment of the population in Manitoba at over 16% in 2011, compared to only 4.3% in Canada overall. (Statistics Canada, 2015).

Manitoba has a multi-cultural population. Over our province's history, generations of immigrants have arrived in Manitoba to start a new life. This remains the case today. Over the last five years, Manitoba's population has

averaged approximately 1% annual growth, driven primarily by immigration. The 2011 National Household Survey indicated that just under 16% of the population were foreign born (immigrants). Recent immigrants, arriving from 2006-2011, made up over 31% of immigrants in the province (Statistics Canada, 2011).

The diversity of ethnic backgrounds is also increasing. In 1901 the Canadian census recorded about 25 different ethnic groups in the country. By 2006, more than 200 ethnic origins were reported both in Canada and Manitoba (MIM, 2009).

### *Abilities*

About one in six Manitobans aged 15 years or older reported having a disability that limited their daily activities (Statistics Canada, 2012). The prevalence of disability rises with age from just around 4% among 15-24 year olds nationally to 33% of the population 65 or older. Women (15%) are more likely than men (13%) to report disabilities. Disabilities related to pain, flexibility and mobility were the most common and were reported by about 12% of Canadians. Hearing and seeing impairments were reported by 5.9% of Canadians. Mental health-related, learning, memory and developmental disabilities were reported by 6.8% of Canadians.

All of this diversity enriches our connection to the world. It also means differing needs in our communities, including hours of opening, range of programming, accessibility, areas of interest for resources, language and communication.

### *Questions about Demographics and Diversity*

1. How should the cultural policy reflect the cultural diversity of our province? How can the province ensure the full range of diverse

Manitoban voices is expressed, represented and developed in our cultural activities?

2. What barriers currently exist for some Manitobans to fully participate in, or have access to culture and how can the cultural policy help eliminate those barriers?
3. How can a new cultural policy ensure that that support for culture reflects Manitoba's diverse regions, communities and populations?



### *Digitization*

The rise of digital technologies has transformed many aspects of everyday life. In 2013, there were approximately 10 billion Internet-connected devices, including 1.2 billion smart phones (The Warwick Commission, 2015). Canadians have led the world in Internet usage, with Canadians visiting the most web pages per month in 2013, and second only to the US in the number of average hours users spent online per month at 41.3 (CIRA, 2014).

Cultural activity grounded in the use of digital technologies (digital culture) has enhanced our ability to both create and consume culture. People can now download, remix and redistribute existing materials as well as create and share original content in real time. An increasing number of arts, cultural and heritage organizations are exploring and exploiting possibilities offered by new digital technologies



to develop, reach and communicate with audiences in innovative and creative ways (The Warwick Commission, 2015). Digital technology also offers opportunities to create new revenue streams. Crowdsourcing platforms have been used for general fundraising as well as generating income for specific projects and selling products or merchandise online.

The Cultural Human Resource Council's 2010 Cultural HR Study noted this 'digital tsunami' is permeating all stages of the cultural sectors creative chain – creation, production, distribution, marketing and preservation. The study characterized digitization as the most prevailing issue across all cultural sub-sectors (CHRC, 2011).

While digital culture creates tremendous opportunities, there are also challenges (The Warwick Commission, 2015).

- Legal concerns such as copyright, authorship, intellectual property, and ownership of users' data can become complex in a digital universe.
- Access and participation remains subject to imbalances in the speed, quality and cost of access to the Internet, further influenced by geographic location and economic capacity.
- Physical and cognitive abilities, as well as confidence and sophistication in use of digital technologies also may impact access.
- Exploiting digital culture requires capabilities many cultural organizations may not have, including funding, time, IT systems, and in-house skills for creation and management of data.

- Cultural workers will need training and skills upgrading to adapt to the new digital realities. Practitioners also need access to knowledge resources such as best practices and instructional material to leverage the advantages of digital technologies (CHRC, 2011).
- Online content is only useful if it can be found. Widely-used, sophisticated search engines such as Google and Firefox rely on commercial use. Less-sponsored material from creative and cultural industries may 'disappear', buried deep in the results (The Warwick Commission, 2015).

### *Questions About Digitization*

1. How can Manitoba artists, producers, and cultural entrepreneurs make the most of the opportunities afforded by the new digital environment?
2. What changes need to occur to assist the cultural community in adapting to the rapidly-changing ways that culture is created, distributed and consumed in a digital environment?

### *Fiscal Environment*

While always of interest to the taxpayer, the past ten years have represented a period of particular focus on government spending. In the wake of the fiscal crisis of 2008, significant investments in infrastructure and other economic stimulus have needed to be balanced by subsequent restraint to find a return to balanced budgets. In spite of these investments, significant infrastructure deficits remain. Demands on public sector spending are rising dramatically as a result of aging populations and associated increases in pension and healthcare budgets. Increasing demand for human services continue to challenge public

coffers. Citizens are also demanding greater accountability and transparency in government spending.

## Canada's provinces are caught in a fiscal vise, and there is no easy way out.

- Glen Hodgson, The Globe and Mail, February 10, 2016

This has created an elevated focus on ensuring an efficient civil service and value for money in all public investments, including opportunities to increase the effectiveness of funding programs.

Another corresponding fiscal consideration is that flat-lined cultural spending for many years has proven to be challenging for many cultural organizations which depend, in part, on public funds to provide cultural experiences valued by Manitobans. Despite considerable pressures on the public purse, it remains that a thriving culture sector is a critical dimension of our community life, as important as our investments in other essential public services such as education and health care.



Meanwhile, the culture sector represents a substantial opportunity for economic development. The sector has shown twice the

rate of economic growth from 2010-2014 compared with the rest of the provincial economy, and it is clear that prudent cultural and creative industries investments can yield significant returns.

Balancing these three dynamics—realizing value for money, ensuring the health and sustainability of cultural organizations, and capitalizing on the economic potential of this vibrant sector—requires a thoughtful fiscal approach and policy framework.

## Support for Culture

Funding for culture in Canada represents a shared responsibility with tiered funding provided by federal, provincial/territorial and municipal governments. Public support is offered across the cultural production continuum, with funding touching on all aspects of cultural creation, production, distribution, consumption and preservation to varying degrees.

The Province of Manitoba in 2015/16 supplied \$59.7 million in grants, contributions and tax credits to the cultural and creative industries, distributed across the sectors. This support is generated across a number of different departments. The Programs Division of Manitoba Sport, Culture, Heritage (along with the two arm's length agencies Manitoba Film & Music and the Manitoba Arts Council) is responsible for the majority of direct funding, with smaller funding amounts from the departments of Growth, Enterprise and Trade, and Manitoba Education and Training. Another substantial amount is delivered through a suite of cultural industries tax credits managed by Manitoba Finance.

Provincial investments equal less than one half of one percent of the provincial budget. They support \$1.7 billion in GDP from the sector and



help leverage federal and municipal funds as well as substantial private investment.

### *Questions About the Fiscal Environment*

1. How can the Manitoba government improve the current cultural funding system?
2. How can better partnerships be built between the public sector and other stakeholders, (eg. academic institutions, industry associations, private companies, regional bodies, foundations, etc)?
3. How can cultural funding sources be diversified? Should new tax incentives be considered? Are the current tax measures still appropriate? What other methods can
- be used to improve non-public sources of revenue to support cultural activity?
4. How can the contribution of the cultural and creative industries to the provincial economy in an environment of fiscal restraint be maximized? What are the most effective means of fostering job creation in the creative industries?
5. What are the biggest internal challenges to sustainability and growth of your cultural enterprise or institution? What are the biggest external challenges to the sustainability and growth of your cultural enterprise or institution? What should the provincial government do to assist in addressing these challenges?





# Part B – Sectors of the Cultural and Creative Industries

## 4. The Professional Arts

### Profile

Manitoba's professional arts sector includes genres and arts practice in writing, dance, theatre, music, visual and media arts. It is comprised of artists, arts organizations, and collectives in both official languages, and Indigenous nations and communities. In Manitoba, book and periodical publishers whose publications demonstrate literary or cultural significance are funded as professional arts organizations. Arts service organizations that provide advocacy and professional development for a professional membership of book publishers, writers, playwrights, crafts artists, and film and visual artists are also funded.

The Manitoba Arts Council, the primary provincial funder of the professional arts, defines a professional artist as "one who has specialized training in the art form, is recognized as such by peers (artists working in the same artistic tradition), demonstrates a commitment to a significant amount of time to creation, and has a history of public presentation or publication." Artists are at the imaginative centre of our society and can celebrate our better nature, act as a catalyst for change, or challenge the status quo.

A professional arts organization is one that "supports, presents, or produces the work of artists who have achieved professional status" (Manitoba Arts Council, 2016). In Manitoba, professional arts organizations include theatre, music, and dance companies and collectives, publishers, and visual arts artist-run and production centres.

An April 2015 Manitoba Arts Council internal scan indicates that 111 different arts organizations, ensembles, and collectives applied to the Council over a five-year period from 2010 to 2015. Of these, 37 organizations were receiving operating support.



*Courtesy of Chronic Creative*

A key characteristic of the local professional arts sector is a high degree of connectivity among artists and organizations. For example, the Winnipeg Symphony professional orchestra performs for opera and ballet productions, and its musicians play in chamber groups and ensembles. The Manitoba Centennial Centre Corporation, another provincial Crown agency, is linked financially with anchor organizations in Winnipeg. The directors of major arts organizations meet regularly.

Collaborations within the arts community often include professional artists and organizations with non-professional arts practitioners and community groups. Examples of this are: the Royal Winnipeg Ballet's Explorability programming for adults with differing abilities; the recent production *Reservations* by Theatre Projects, which engaged schools and the Indigenous community in dialogue about issues uncovered in the play; or Cercle Moli re's

collaboration with a local African–Franco-Manitoban theatre group.

This degree of connectivity and collaboration is just one consequence of the fact that, unlike in most other provinces, the majority of the sector is established in one centre: Winnipeg. Professional artists in many disciplines reside throughout the province. This is less true for performing artists whose art form is collaborative by nature and requires presentation venues.

There are only a very few professional arts organizations located outside Winnipeg. While geographic focus fosters networking and collaboration, it also means challenges for access to supports of various kinds and networking for artists who do not live in Winnipeg. While also a challenge in Winnipeg, the lack of venues and galleries in rural and northern areas limits artists' access to presentation or publication opportunities to develop their professional art.

The sector relies heavily on volunteer support. Thirty-three professional Manitoba arts organizations are registered in the Canadian Arts Database (CADAC) for 2014–15 as receiving operating support from the Canada Council or Manitoba Arts Council. They reported 6,240 volunteers in their organizations in that fiscal year. Given that this represents only a small proportion of Manitoba's professional arts organizations the number of volunteers can be assumed to be much larger.

A Hill Strategies report about arts and culture volunteers and donors, based on Statistics Canada's 2010 Survey of Giving, states "About 29,000 Manitobans volunteered in arts and culture organizations in 2010, representing 2.9% of the population 15 or older. The 31,000 arts and culture donors represent 3.1% of

Manitobans 15 or older. Both of these statistics are slightly higher than the Canadian averages (2.7% for both volunteers and donors)" (Hill Strategies Research Inc., 2013). Hill Strategies reported a slight increase in 2013 to approximately 4% of Manitoba volunteers (about 45,000) and a donor rate of 5% in arts and culture (These statistics are not separated for arts and for culture in the reports) (Hill Strategies Research Inc., 2016).

Hill Strategies Research also provides statistics regarding individual artists, based on the 2011 National Household Survey and the Labour Force Survey (Hill Strategies Research Inc., 2014). In that year, in Manitoba, 4,200 self-identified artists represented 0.68% of the provincial labour force (1 in every 148 workers). Of these, musicians and singers comprised 33%. The average income of Manitoba artists was \$26,800, compared with the overall labour force average in Manitoba of \$42,420. This is the second lowest average income for artists in Canada. The report indicates that on average, female artists across Canada earn 31% less than the average earnings of male artists, equivalent to the gender gap in the overall labour force.

The report also indicates that artists:

- Have much higher levels of formal education than the average labour force (44% have a bachelor degree compared to 25% of the overall labour force)
- Tend to be older than the average overall labour force (25% over age 55 versus 19%)
- Are much more likely to hold multiple jobs (11% compared to 5% of the overall labour force) and

- Have a much higher rate of self-employment ((51% compared with 10%).

The report also indicated that in 2011, “[t]here are fewer than 500 Aboriginal artists, visible minority artists, and artists in many specific occupations in Manitoba.” Given the more recent changes in Manitoba’s demographics, and given the significant increases in Indigenous arts practice, arts practice related to digital technologies, and deaf and disability arts practice, it is reasonable to expect the next census to reflect some increase in the number of these artists in Manitoba.

specific impact of the professional arts organizations in Manitoba has not been separately gathered or reported. Manitobans for the Arts, a coalition of arts advocates with a provincial membership of individuals and organizations may be a source of aggregated provincial data in the future. A few points from a sample of professional arts organizations provide an indication of the contributions of this sector:

## Social and Economic Benefits

Most studies of social and economic impact examine the combined effect of the arts and creative industries, and as such data on the

<i>Organization</i>	<i>2014-15 Revenue</i>	<i>Employment</i>
<b>Manitoba Theatre Centre (MTC, 2015)</b>	<b>\$10.5 Million</b>	<b>Over 90 staff, plus cast members</b>
<b><i>Community Impact</i></b>		
<ul style="list-style-type: none"> <li>- Student matinees, and Backstage Pass program of six theatre workshops</li> <li>- Winnipeg Fringe Theatre Festival, including a free mainstage and works by over 175 local, national and international companies</li> <li>- Master Playwright Festival, including free lectures and film screenings</li> </ul>		
<b>Royal Winnipeg Ballet (RWB, 2015)</b>	<b>\$13.2 Million</b>	<b>Over 166 dancers and staff</b>
<b><i>Community Impact</i></b>		
<ul style="list-style-type: none"> <li>- Going Home Star, Truth and Reconciliation production representing the experiences of residential school survivors</li> <li>- Sharing Dance Day, Dance outreach workshops with 446 students</li> <li>- Cultural Days presentations and free dance workshops</li> <li>- Ballet demonstrations at Polo Park, Ballet in the Park (free performances)</li> </ul>		
<b>Winnipeg Symphony Orchestra (WSO, 2015)</b>	<b>\$8.7 Million</b>	<b>Over 70 musicians and staff</b>
<b><i>Community Impact</i></b>		
<ul style="list-style-type: none"> <li>- Education programs providing over 33,000 student experiences</li> <li>- Community engagement involving young musicians, presentations at healthcare centers, and</li> </ul>		



## participation in Manitoba culture days

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## Government Programs and Support

The Manitoba Arts Council (MAC), an arm's-length agency of the province of Manitoba Sport, Culture and Heritage is mandated "to promote the study, enjoyment, production and performance of works in the arts."  
(Government of Manitoba, 2004)



MANITOBA ARTS COUNCIL  
CONSEIL DES ARTS DU MANITOBA

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rough a Memorandum of Understanding with the Department, the Manitoba Arts Council assumes funding responsibility for the professional arts.

The MAC's granting decisions are based on the recommendations of peer assessment juries and panels. MAC grants fund:

- Artists' creation/production, travel and professional development, and residencies.
- Students who are going on to higher education in their professional arts practice
- Prizes for students who show exceptional ability in national music competitions.
- Placement of professional artists in community groups
- Payment of professional arts jurors in juried art shows around the province.
- Touring in the province by individual artists and arts organizations

In 2015/16, through its regular programs, the Manitoba Arts Council provided a total of approximately \$8.5 million to Manitoba artists and arts organizations. This included \$919,537 to individual artists, and \$6.2 million to arts organizations. This included \$964,856 for Arts and Learning programs and Arts Development programs (Manitoba Arts Council, 2015).



The MAC provides operating support to professional arts organizations, generally with a three-year funding agreement. The MAC has a Manitoba Arts Partnership Agreement (MANAP) with nine anchor organizations in theatre, music, dance, and the visual arts. MANAP organizations meet with peer assessors to discuss programming and initiatives, and are also expected to have increased responsibilities in their connections to the community. Other organizations receive support for operations and programming through annual, two-year, or project grants. All organizations sign a funding agreement with MAC and provide midterm and/or final reports on the grants awarded to them.

**In 2015-16 the Manitoba Arts Council provided \$8.5 million to Manitoba artists and arts organizations.**



Individuals receive grants through programs for creation/production, travel and professional development, and residencies. The Council has a long-standing residency program in partnership with Riding Mountain National Park, and artist residency partnership agreements in place with provincial, national, and international organizations.

The MAC also provides assistance to organizations that have a significant role in fostering capacity to provide professional arts experiences to the public. For example, it has partnership agreements with organizations that:

- Support rural arts councils in their work to bring professional arts experiences to their communities
- Assist arts and culture organizations to develop capacity in obtaining sponsorship
- Assist arts teachers in training and providing exposure to careers in the professional arts to students; and
- Pay artist fees to writers to read their works around the province.



MAC also participates in a tri-agency agreement with the Federal Department of Canadian Heritage and Manitoba Sport, Culture and Heritage to support the Franco-Manitoban community in preserving and fostering its cultural identity.

Touring by individuals and organizations within the province is important to providing professional arts experiences to all Manitobans. Artists tour throughout Manitoba, from Churchill to southern communities, in schools, on reserves, and in concert halls. Touring activities also often involve community groups. The Manitoba Chamber Orchestra, for example, works with the Frontier School Division for its Fiddlers on the Loose program. As well, the MAC arts and learning programs send professional artists and groups around the province.

Some professional arts organizations also receive support for project and festival grant programs through the Arts Branch of Manitoba Sport, Culture and Heritage. The Branch “provides support services and consultation in both official languages in the areas of marketing, arts management, resource development, skills training, events coordination and cultural policy” (Government of Manitoba, 2016).

Other provincial departments also support the professional arts sector, directly or indirectly. For example, Manitoba Education and Training supports arts and learning initiatives; and Manitoba Growth, Enterprise and Trade promotes arts activities throughout the province through its tourism initiatives.

The Winnipeg Arts Council (WAC) is a not-for-profit corporation that distributes funding on behalf of the City of Winnipeg to arts organizations and artists. The WAC awarded just over \$3.5 million in grants in 2014. 104 individual artists and arts administrators were awarded \$206,000 for creation/production and travel/professional development; and 77 organizations were awarded \$3,291,850 in project, programming, and operating support.



In addition, the WAC provides an acclaimed public art program, sponsors a speakers' series, and maintains an arts event billboard and a recent artist-in-the-workplace residency program (Winnipeg Arts Council, 2016).

The Canada Council for the Arts is the primary national funder of the professional sector in Manitoba. Its recently released Open Data Access website indicates that in 2014-15, \$6.7 million was awarded in grants to individuals and organizations in Manitoba (Canada Council for the Arts, 2016).

## Key Trends and Challenges

### *New Forms of Arts Practice*

New forms of arts practice are emerging in ways that present challenges to traditional programs of art support. The core concept of "professional arts" is in need of re-examination as the lines between "vernacular, amateur, commercial and professional artistic practices" become blurred and the rise of "pro-am" arts activities accelerates (Canada Council for the Arts, 2012).

In addition, more and more artists and organizations are transcending traditional disciplinary boundaries, in a funding environment where disciplines have represented a core organizing principle.

Groups and individuals perform and present in non-traditional and pop-up venues, and have a high degree of physical and online mobility. In Manitoba, innovative public arts presentations have occurred in artists' homes, restaurants, hospitals, on a river, and at a public swimming pool.

Collaborations across disciplines are frequent, often dissolving after the project has been completed. Mentorships are often short-term and related to specific projects.

Cell phones and other digital tools figure in art-making. Many artists are concerned with issues of social justice and social cohesion, and with creative place-making. These new forms of art-making require skills development in self-promotion and marketing, technology, and business and administration.

The significance of new forms of arts practice and art-making is that much of this activity falls outside the boundaries of traditional support programs. Funding needs to be responsive and adaptive to rapidly changing practices.

### *Organizational Management and Governance*

Building organizational capacity is a priority for Manitoba organizations of all sizes, no matter the type of organization: from start-ups, collectives, and online companies to anchor organizations. The term "capacity" is used inclusively here and refers to board governance, fundraising, volunteer management, strategic and business planning, administration and marketing/communications, and succession planning.

In addition to developing best practices, organizations need adaptive capacity that will enable them to test and implement strategies to develop programming and engage Manitoba's new and diverse audiences to encourage sustainability.

Several initiatives are emerging to answer this need. For example, ArtSupport Manitoba, a project of ArtSpace Inc., receives provincial and federal funding through a three-year program, and is based on an Australian model. It works with arts and culture organizations in Manitoba to provide skills training in building sponsorship. ArtsVest, a national program, was active in Manitoba in recent years also to assist

organizations to build sponsorship capacity. Manitoba Arts Council's Management and Governance program provides limited funds to organizations to enable them to hire consultants to build strategic plans.

Organizations need adaptive capacity that will enable them to test and implement strategies and programming to engage Manitoba's new and diverse audiences.

### Access

Access to the arts is a multi-faceted issue. It can refer to barriers created by geography, social/economic issues, culture, and levels of ability, in addition to many other factors.

The lack of a variety of presentation venues, particularly affordable studios and small performances venues, limits the ability of artists to show their work in Winnipeg and throughout the province. Manitoba's vast northern and rural landscape means that transportation, networking, and access to technological means of communication are another significant geographic barrier to access.

The Canada Council's new funding model and strategic aims indicate that fostering diversity in arts organizations and audiences will be an assessment criterion for funding, and provides special grants for Indigenous artists, and artists practicing in deaf and disability arts. These factors will have an impact on several kinds of lenses that arts organizations will need to apply to their work.

Compliance with Manitoba's new accessibility legislation is another example of the type of access challenges that are and will be faced by artists and arts organizations. Over the past few years, the Arts and Disability Network Manitoba has become increasingly active in advocacy and education on behalf of its members (Arts & Disability Network Manitoba, 2016).

At present, many individuals and organizations in the professional arts sector lack capacity and the professional development and training in skills, outreach, research, and marketing to enable them to meet the many challenges posed by barriers to access to the arts and by new and diverse audiences.

### Youth Engagement

MAC's strategic planning focus groups held around the province in 2010-11 revealed an almost unanimous concern for encouraging youth engagement in the arts as professional artists, volunteers, or as arts administrators and board members.

Youth in the arts today are often engaged with social justice issues, are entrepreneurial and highly connected through social media, and develop and present their arts practice outside established organizations. Participants in focus groups from the North and rural areas spoke of the need for links between traditional and contemporary arts practice, and for youth-initiated programming.

Youth in these focus groups spoke of the need for business training, access to supports through centralized and collaborative services outside traditional arts funding structures, and awareness of the implications of increased inter- and multi-disciplinary arts practice and the emphasis on innovation and risk.



Younger artists work in shared and multi-platforms. Often, innovative projects are not a “fit” with existing granting programs, and artists are turning to crowd sourcing as additional revenue streams. All these characteristics indicate a growing, strong professional youth arts movement outside arts institutions. Some opportunities do exist to provide skills and arts training to youth--ACI Manitoba, MAWA and other mentorship organizations, the newly constituted Innovation Alley, and academic institutions, for example—but again, with a few exceptions, these are largely limited to Winnipeg. As well, arts organizations are challenged to adapt their traditional structures for new forms of arts practice at the same time as they are committed to maintaining a more traditional audience base.

### *Funding Resources*

With the new resources allocated federally to the Canada Council, there is now some reason for optimism that Manitoba’s professional arts sector will also eventually benefit from additional support for initiatives that meet the Canada Council’s strategic goals. Municipal funding in Winnipeg is also gradually increasing.

Provincial funding, which provides the majority of funding for professional arts in Manitoba, has been frozen or effectively decreasing against the cost of living for many years, while costs are

rising. Arts organizations in Manitoba are now reporting a decline in traditional subscription revenues as arts attendance practices and audiences change, and these organizations do not have the financial and adaptive capacity to explore and experiment with new models of audience engagement with the province’s increasingly diverse audiences. Provincial funding support has not been structured to, or modeled on enabling existing arts organizations in Manitoba to add additional strategic research and pilot projects to their scope of audience development activities.

Provincial funding, which provides the majority of funding for professional arts in Manitoba, has been frozen or effectively decreasing against the cost of living for many years, while costs are rising.

No new arts organizations in Manitoba have received operating support from the Manitoba Arts Council in several years, due to stagnant funding realities. New organizations eligible to apply to Manitoba Arts Council programs typically must apply for support related to individual projects rather than operations.

### *Indigenous Engagement and Impact*

The Indigenous population is making an increasingly significant contribution to the richness of Manitoba’s professional arts sector. 25% of applicants to the MAC Media Arts

program self-identified as Aboriginal. 33% of the awards were made to applicants self-identifying as Aboriginal.

Manitoba has one of only four Canadian Indigenous artist-run centres, and the acclaimed Aboriginal Peoples Television Network (APTN) is based in Manitoba. There is a M  tis publishing company based in Winnipeg, and several other publishers publish books by and about Indigenous peoples and culture. The province also has several Indigenous-based arts groups in writing, music, film, and dance, and individual Indigenous artists practice in all arts genres. The Manitoba Arts Council offers two specific programs for individual Indigenous artists for creation/production and for mentorships in the arts. Brandon University's Department of Fine Arts offers a major in Aboriginal Art.

The Manito Ahbee Festival is an annual celebration of Indigenous music, arts, culture and heritage. It showcases the talents, gifts and abilities of Indigenous artists from all nations.

While Manitoba's Indigenous community is increasingly urban and young, many artists live in northern and rural areas with only limited access to networks, arts organizations, and professional development. The MAC's Aboriginal Arts Focus Forward consultation that was part of its Strategic Plan development in 2011 identified the following as key concerns:

- support for emerging artists through mentorships, professional development, and arts learning activities
- outreach and marketing strategies related to youth
- opportunities for multidisciplinary productions and performances locally, nationally, and internationally

- audience development
- partnerships with existing agencies and events, and
- building public will, advocacy, and mandates to support Indigenous arts and culture.



Other issues identified have been: limited access to online grant data and consultations, geographic barriers, lack of Indigenous editors, and difficulties related to having English as a second language. Support from the federal government and perception of public value are significantly increasing. The proposed new Canada Council funding model, for example, includes a specific stream to support First Nations, M  tis, and Inuit artists.

Contemporary Indigenous artists often base their work on traditional concepts and practice, and consult with Elders for advice and protocols. Art projects are often politically inspired. Travel by Indigenous artists is increasing to international art events and festivals. Issues of misrepresentation, cultural appropriation, and lack of understanding of and adherence to cultural protocols are still of concern to the community.

### *Questions About Professional Arts*

1. What should be done to ensure that the arts community continues to meet the



- highest standards of professional arts creation or programming? How can a new cultural policy address the particular demands of marketing the arts to audiences and consumers both within and outside of Manitoba?
2. How can the high degree of connectivity and collaboration among Manitoba's professional artists and arts organizations to best advantage? Where might there be opportunities for increased coordination, consolidation, shared resources or efficiency?
  3. How can the cultural community ensure the full range of diverse Manitoban voices is expressed, represented and developed in the professional arts (including women, ethno-cultural minorities, people with disabilities, urban/rural and Indigenous peoples)?
  4. What are the training and professional development challenges for Manitoba artists?
  5. Is the operating model of the Manitoba Arts Council still appropriate? How can it be modernized or improved?

## 5. Community Arts

### Profile

#### Definition

Community Arts activities are integrated into the lives of everyday people, offering the public inclusive and accessible opportunities to participate in arts and culture. They help to build skills and arts literacy as well as celebrate and promote understanding, awareness and/or appreciation of a community's heritage, culture, and identity (Arts Branch).

Over the past 20 years, Community Arts in Canada has gained greater recognition as a discipline within the creative arts. Evidence of this is found in the increasing support for community arts practices within professional arts funding agencies such as the Manitoba Arts Council and the Canada Council for the Arts. Recognizing that the arts contribute to people's well-being and improve quality of life, communities both large and small encourage and support a wide range of local and home-grown arts and cultural activity.

In response to the recognition of the importance and proliferation of arts activity in communities, more and more artists and cultural leaders are interested in collaborating with the broader public in their creative practices.

**More and more artists are interested in collaborating with the broader public in their creative practices.**

The definition of Community Arts varies but frequently includes an artist or cultural leader working collaboratively with a community. Community arts include:

*Community-Engaged Arts* involves communities taking part in collaborative art making

*Arts Education* involves development of arts literacy and skills, and

*Arts Development* focuses on accessible and inclusive participation in the arts (Hemphill & Forbes, 2013).

*Community-Engaged Arts* is community specific, involving collective art experiences that are facilitated by an artist or cultural leader (from any discipline). Working as part of an organization or independently, the artist or leader collaborates with community members to create work that reflects the community's culture, language, unique interests, qualities, and/or priorities. Each initiative or project is participant driven, with finished projects that celebrate identity, unite community members, explore issues, encourage open dialogue, etc. (ArtBridges, 2016).

*Arts Education* provides learners of all ages with knowledge, instruction and an opportunity to actively participate in arts and culture. While often undertaken in traditional academic settings, arts education is not limited to a traditional model where students study, create, and then present creative work. Arts education creates environments where arts and culture becomes a vehicle for expanding, inspiring, enhancing, and exploring issues of significance based on the student's unique interests and perspectives. Teaching artists are fully engaged contributors in their teaching environments. They provide technical knowledge, encourage conceptual exploration, and function simultaneously as an arts resource, mentor, trainer, and invaluable member of the educating team (National Guild for Community Arts Education, 2015).

*Arts Development* focuses on creating arts opportunities for individuals and communities that otherwise would have limited or no access to the arts. Faced with barriers such as geography, socioeconomic challenges, and language, communities sometimes lack the resources, equipment and/or expertise to fully

engage in the creative arts. Arts development initiatives address these needs by providing arts specific human resources/expertise, financial support, professional development opportunities, etc. Similar to Community-engaged Arts, it is the community that is the driver in arts development initiatives.



Community arts also includes festivals and events, which provide opportunities for the public to experience the work of highly accomplished artists, and they drive local tourism and economic activity. Festivals are celebrations of our artistic, ethnic and cultural diversity and provide communities with exciting programming throughout the year.

### *Make-up of the Sector*

Manitoba is alive with community arts. Throughout the year and across the province, Community-Engaged Arts, Arts Education and Arts Development initiatives are underway. They are supported by a growing number of specialists in community arts practices and a diverse group of arts and cultural organizations including: organizations with provincial or local mandates; arts festivals; rural arts councils and comit s culturels; First Nations communities; grass-roots community groups; schools; presenters; discipline specific community arts groups; and urban art centres.



## Manitoba is alive with community arts.

A variety of *arts based community groups and organizations* are located throughout Manitoba that offer cultural activities including festivals, workshops and classes, performances by local theatre and dance groups, visual arts exhibitions, concerts, pow wows, etc. These activities frequently take place in underserved, rural, remote, or northern communities and provide community members with an opportunity to take part in arts skills development, participatory arts opportunities, community recognition events, and access to professional arts experiences.



*Urban Art Centres* are organizations that identify as specialists in the community arts field and have missions and mandates that support this speciality. The majority are located in large urban centres with staff members that are administrators, practicing artists in a specific discipline, and community arts practitioners. The ongoing programming and special projects offered by these organizations exclusively involve artists and cultural leaders (both local and visiting) who engage with the organizations' constituency or local community. Of utmost significance is that any work undertaken is initiated by the community and is relevant to them. Examples of urban art centres in

Manitoba include Art City Inc., Art Beat Studio, NorVa Art Centre, and Graffiti Art Programming (Kuly, Stewart, & Dudley, 2005).

*Regional Arts Councils* and *Comit  s Culturels* are located outside large urban centres and deliver arts programming to a specific community that is defined by a geographic boundary. The organizations offer visual arts exhibitions and performing arts events along with a combination of those included in the three established community arts categories. All activities are undertaken with a focus on and recognition of each community's unique culture, heritage and language preferences

Although the primary focus of *Professional Arts Organizations*, according to the Manitoba Arts Council's definition, is "to support, present, or produce the work of artists who have achieved professional status" (Manitoba Arts Council, 2016), many include community arts initiatives as essential parts of their annual programming. Regardless of primary focus, size or discipline, almost all professional arts organizations now participate in some form of community arts activity or engagement as resources allow. Identified as community outreach, touring or arts education, the activities most often involve the professional artists and/or staff associated with the organizations engaging communities beyond their established constituency through workshops, mentorships, intimate performances, and/or collaborations (Manitoba Arts Council, 2016).

Many non-art organizations and institutions in Manitoba, such as schools, hospitals, social agencies, and recreation departments offer programs that include the arts and artists in a community arts model. These programs are intended to reinforce, inform, educate, and/or engage the initiating organization's constituency through arts-based activities. In these cases, the people participating in the

activities are often children, non-artists, or amateurs who ultimately have an art experience for the purpose of general enjoyment, therapeutic benefit, as a learning tool, or as a community building exercise outside of a traditional art venue.

## Social and Economic Benefits

Conducting a robust evaluation of the social and economic impact of participation in community arts is challenging. Benefits include positive changes in self-esteem, cognitive skills, health and education, social change, community pride and identity, economic diversity, work opportunities and satisfaction (Australian Expert Group in Industry Studies of the University of Western Sydney, 2004). In a recent speech, Senator Pat Bovey cited significant research on the benefits of community arts in reducing crime and reducing health costs. She noted that, based on this research, “the arts are not a frill but critically integral to the health of our communities” (Bovey, 2016)

Participants in community arts activities report personal and educational (where applicable) change. Involvement in the arts makes people happy and produces opportunities to make friends, to be creative, and to feel less isolated. In addition to the acquisition of artistic skills (necessary for projects requiring the fabrication of objects or delivery of a performance), reports including the *Impact of the Arts on Canadian Life*, published by the Canada Council for the Arts and *Do Community-based arts projects result in social gains? A review of Literature* by Tony Newman, Katherine Curtis and Jo Stephens for the for Barnardo’s UK, participation also yields improvements in overall health, community connections, individual self-worth, communication skills, trust, and so on.

Communities that take part in collective art projects often see improvements in cultural

understanding amongst residents: a more positive sense of local identity, increased tolerance and conflict resolution, and improved overall social cohesion. When community initiated arts experiences become recognized as essential parts of civic participation, even the most distressed community reports feeling empowered and being positively transformed.

Economically, community arts contribute to civic pride which can result in revitalization and renewal of communities. The aesthetic appearance of a place, the availability of leisure time activities, and alternative methods of generating income through artistic production can all improve. Skills and knowledge attained by participants in arts inclusive projects have resulted in greater overall participation in society, employability, and the pursuit of educational development and training. Some specific groups in Manitoba that have reported these kinds of successes include: residents of rural, remote and northern communities; persons with disabilities; those struggling with mental health challenges; and those who have been previously incarcerated (Canada Council for the Arts, 2016).

## Government Programs and Support

Provincially, community arts are supported through the Arts Branch of Manitoba Sport, Culture, and Heritage. These programs are categorized as “provincial programs whose purpose is to support Government’s policy objectives respecting community arts development, including objectives to address the goals of individual wellness, healthy communities, and economic growth” (Province of Manitoba, 1996).

The Arts Branch administers eleven programs that support arts-based programming in communities across the province. These programs serve between 300 and 400 groups

annually, depending on the number of projects proposal intakes. In 2015-16, a total of 282 groups received funding and more than \$4.3 million in grants were awarded to support community arts programming.

### In 2015-16 the Arts Branch awarded \$4.3 million in grants to support Community Arts Programming

Groups that currently access support through Arts Branch programs include: arts and cultural organizations with provincial or local mandates; major arts festivals; rural arts councils and comit  s culturels; First Nations communities; grass-roots community groups; schools; presenters; discipline specific community arts groups; and urban arts centres. Several Arts Branch programs are community specific, offering targeted support to Indigenous or Francophone communities, while some programs are event specific, offering support to community festivals or other arts and cultural festivals. These programs generally provide support for art skills development, audience development, arts presentation, festivals, artist-in-community residencies and art service delivery.

Some of the organizations that apply for funding through the Arts Branch also receive funding from other government departments such as Education and Training, Justice, and Growth, Enterprise and Trade, based on the nature of their mandates and reach of their programming.

The Manitoba Arts Council (MAC) may also provide funding where the community arts activity involves a professional artist (Manitoba

Arts Council, 2016). Specific programs available for community arts activities at MAC include a suite of project grants identified as Arts Development (including an emphasis on aboriginal arts), an Arts Education division, and several other project-based support programs directed at providing dollars for activities in rural, remote and northern communities. These programs are accessed by a range of clients including community arts organizations, regional arts councils and comit  s culturels, and non-arts organizations (including schools).



It should be noted that discipline-specific arts organizations supported operationally by the province and/or Manitoba Arts Council include community arts initiatives as part of their annual activities. Often categorized as community outreach, community engagement, arts education, development, etc., the specific activities and projects are community engaged, educational and/or developmental. The emphasis on this kind of activity appears to be increasing within these organizations, with expectations for its delivery and correspondent financial compensations from public funders keeping pace.

## Key Trends and Challenges

### Arts for Everyone

Established definitions of professional artist and professional arts organizations often exclude creative activities that are culturally specific, are initiated by non arts communities, involve participants that are classified as amateur or youth and artistic practices that are collaborative or fall outside of established artistic disciplines (Gattinger, 2011). The exclusion of these groups and their practices reflects an undervaluing of creative work that is classified as community based, that is commercial, or classified as non-professional by arts funding bodies and certain segments of the artistic community.

In sharp contrast, community arts can include any creative activity that brings people together and creates an opportunity for them to gain new skills and have new experiences. It nurtures the imaginative potential that exists in all people and encourages communities to actively engage the world around them through art.

### Growing Support for Community Arts

In 2006, the Canada Council for the Arts hosted a Community Arts gathering that included Community Arts practitioners, representatives from Community Arts organizations, funders, and other stakeholders engaged in community-based work (including funders) from across Canada. From that gathering, *IMAGINE: An External Review of the Canada Council for the Arts' Artists and Community Collaboration Fund* was published and the Canada Council's Equity, Inter Arts and Aboriginal Arts offices were established. The offices responded to the surge of Community Arts represented in every province by offering services and programs specifically designed for multi-cultural artists; Community Collaboration projects; Indigenous

arts; disability arts; arts programs in rural, remote and northern communities, and so on (McGauley, 2006).

Building on this focused support for community arts practice, in 2017 the Canada Council is launching six new programs as part of the new funding model. The model is intended to streamline and expand supports for arts activity and significantly identifies diverse communities, public engagement responsibilities, access, collaborative approaches, etc. that all directly connect to community arts in each of the new programs' objectives (Canada Council of the Arts, 2016). It remains to be seen how these changes may impact provincial support programs or local and regional arts practices.

### Need for Multi-Use Spaces

Urban arts centres, community arts organizations, regional arts councils, and comit es culturels across Manitoba offer a wide range of classes and workshops that require specific space, such as a dance floor, visual arts studio space, band room, and/or a computer lab. Additionally, these groups are presenters and may have gallery spaces, stages/auditoriums, and screening rooms. As a result of the complexity of their needs, community arts groups (both those in large urban centres and in rural, remote and northern settings) want to build multi-use buildings or renovate existing buildings to suit their needs. Unfortunately, it is difficult for community arts organizations to secure the revenue required to build or renovate and extremely challenging to sustain operations if they are successful.

## Indigenous Engagement and Impact

In the paper *Art and Wellness: The importance of Art for Aboriginal Peoples in Health and Healing*, published by the National Collaborative Centre for Aboriginal Health 2012, P. Dufrene and G. Harvey are quoted: "In Indigenous

cultures, the production of artistic works or participation in creative expression is woven into the fabric of everyday life” in contrast to “western conceptualization of art, which generally limit the term to objects or expressions of aesthetic appeal” (Muirhead & de Leeuw, 2012). The weaving of art into all human experiences, with every community member participating regardless of training or age, and all forms of expression equally valued, aligns with the very definition of community arts.

Recognizing this connection, Indigenous-specific sections, programs of support, and funding officer recruiting developed in tandem with those for community arts across Canada beginning in the early 1990s. Both the Arts Branch and the Manitoba Arts Council currently have programs specifically designed for community arts and Indigenous artistic/cultural initiatives and Indigenous arts consultants who administer them.

### *Understanding and Supporting Indigenous Community Arts Projects*

Indigenous-specific arts initiatives submitted for consideration to funding programs in Manitoba are frequently community-based with artists and organizations that encourage community engagement, arts education and arts development. What makes them unique from other projects in the community arts field is that they celebrate a perspective that is unique to Indigenous people and their culture. The Canada Council initiated and published a report

titled *Evaluation of the Suite of Aboriginal Arts Programs* in 2015 (Proactive Information Services Inc. & Program Evaluation & Beyond, 2015). The report includes the history of support for Indigenous arts, how projects are evaluated, the ways in which Indigenous artists work and organizations operate, and it suggests ways to move forward. This structure of evaluation is unique, using a pathway approach of *sharing, knowing, producing and creating*.

### *Questions About Community Arts*

1. What can be done to ensure that all Manitobans have the opportunity to experience or participate in the community arts (including women, ethno-cultural minorities, people with disabilities, urban/rural and Indigenous peoples)?
2. Why are the community arts important to Manitobans and their communities? What priority should community arts programming have in a new Manitoba cultural policy?
3. What barriers do Manitobans face to accessing opportunities to experience community arts activities (performances, participation, arts education, etc)?
4. How can government assist with the development of community arts? What types of funding best answer the needs of community arts practitioners? What types of assessment (e.g. peer review, formula-based)?



## 6. Creative Industries

### Summary Profile

The creative industries of Manitoba are those directly involved in the commercialization of cultural products and services. They have an industrial or sector-wide approach towards job creation, training and employment, and demonstrate a critical mass of activity that enables the province to compete with other jurisdictions within and outside of Canada. The sector is comprised of businesses and individuals who earn income through the creation, production, marketing, sale and distribution of cultural products and services. In Manitoba, these are predominately small or micro-sized businesses engaged in sub-sectors such as:

- Film and television (now often referred to as linear media)
- Interactive digital media
- Music
- Publishing, and
- Visual arts/fine crafts.

Each of these sub-sectors are discussed in more detail later in this chapter.

### *Economic and Social Benefits*

Collectively, the creative industries are by far the largest contributor towards Manitoba's Culture GDP. In 2014, the creative industries accounted for \$1.203 billion dollars towards Manitoba's total culture GDP of \$1.699 billion; as well as 13,550 of the total 21,565 culture jobs in Manitoba (Statistics Canada, 2016).

The creation and consumption of cultural products enrich our lives as human beings in many ways. They can entertain us, beautify our

spaces, stimulate our senses, elicit an emotional response, or provoke thought and dialogue. They can connect us to our traditions and our past or project us into the future. They reflect and inspire our pursuit of excellence.

The availability of uniquely Manitoban or made-in-Manitoba cultural products builds our reputation outside of the province as a vibrant creative place. They tell Manitoba stories or present a Manitoban perspective. They help us recognize and celebrate our unique local or regional identities and enhance our pride of place. At the same time, they act as ambassadors outside of the province attesting to our specialness and the quality of our creative talent.

### *Overarching Trends and Challenges*

The majority of Manitoba's creative industries face a common challenge of adapting to the disruption of their industries by the digitalization of creative content and the globalization of their marketplaces. The interactive digital media industry is the exception, however, as it has grown and developed in tandem with—and to a degree, as a result of—these two forces.

Access to capital is the major barrier for growth for Manitoba's creative industries.

The four traditional creative industries Film and Television Production, Music, Publishing and

Visual Arts/Fine Crafts) whose products and processes predate widespread access to digital technology, have seen plummeting sales and revenues using their old business models. These industries are in various stages of evolving new models that harness the opportunities for growth and innovation offered by digitization and globalization. These new business models include creating alternative and diversified revenue streams and increasing Manitoba cultural exports by expanding into new markets.

To succeed at this, traditional creative industries must implement new skills or new technology, often requiring additional human and financial capital, while at the same time maintaining their traditional practises.

The entrepreneurial micro-business model, so prevalent across all of Manitoba's creative industries, means that most companies lack the necessary capital to support growth. Next to our geographic isolation and lack of direct access to international content buyers, access to capital is the major barrier to growth for Manitoba's creative industries.

One further issue involving the creative industries is the lack of high quality comprehensive labour force information and data collection on the size of the industry.



*Courtesy of Manitoba Film & Music*

## Film and Television Production

Manitoba's film and television production industry is responsible for about 2% of Canadian film and television content bought and sold around the world. In 2013-14, we were the fifth largest film and television producer in Canada, tied with Nova Scotia. In 2015, Nova Scotia significantly reduced its film and television incentive programs. This change is expected to firmly position Manitoba as one of five major production centres in the country after Ontario (40%), British Columbia (28%), Quebec (22%) and Alberta (4%) (Canadian Media Production Association (CMPA), Association qu  b  coise de la production m  diatique (AQPM), Department of Canadian Heritage, Nordicity Group Ltd., 2014).

## Economic Impact

Manitoba's linear media industry includes more than 50 film, television, animation and digital media production companies. They produce content for feature films, animation and visual effects as well as television or web-based programs that are created in partnership with, sold, or licensed to distributors and broadcasters worldwide. Other industry stakeholders include unions and guilds, film festivals, production services providers, broadcasters, not-for-profit cultural groups, a sector council (Film Training Manitoba), and an industry association (On Screen Manitoba). There is slight overlap between the Film and



television and Interactive Digital Media industries. Approximately 20% of Interactive Digital Media is related to film and television projects, as discussed in the previous section.

In 2014-15, 67 productions were shot in Manitoba including 13 feature films, 22 television series, and various web-based productions including the multi-episode television series *The Pinkertons* and *Sunnyside* as well as the documentary *Polar Bear Town* which was shot entirely in and around Churchill.

### Manitoba film and television production activity reached \$113.6 million in 2014 -15.

The film and television production industry contributed significantly to the provincial economy with an impact on the Manitoba GDP of approximately \$71.4 million between 2008 and 2013 and generating 1,267 full-time equivalent jobs annually (Nordicity Group Ltd., 2013). Film and television production activity reached \$113.6 million in 2014-15, of which \$53.9 million was spent in Manitoba and directly benefitted Manitobans (Manitoba Film and Music, 2015).

Manitoba's domestic film and television production is important in presenting Manitoba's unique viewpoint, enhancing pride of place and providing opportunities to express our distinct prairie voice.

#### Government Programs and Support

Manitoba's support to the film and television production industry includes corporate tax credits, operating support, project grants, market development, equity investment, training and professional and business development support.

Manitoba's primary support for the film and television production sector is administered through Manitoba Film and Music, the Crown agency responsible for Manitoba's film, television, and music production industries.



MFM administers an array of financial incentives including equity investment, corporate tax credits, and industry support project grants on behalf of the Manitoba government. It also operates a full-service film commission offering a broad range of location services and business, government, and industry liaison services.

The Film and Video Production Tax Credit administered by Manitoba Film and Music, plays a crucial role in attracting substantial investment to Manitoba. The provincial film tax credit is equivalent to up to 65% labour-based (45% base plus bonuses) or 30% cost of production tax credit.

Sport, Culture and Heritage supports the industry through the Film Liaison Manager position. They facilitate access to provincially owned properties, parks or facilities and serve as the main point of contact with the film industry on behalf of all provincial departments. Sport, Culture and Heritage also provides annual operating support to On Screen Manitoba, the National Screen Institute and a number of film festivals. On Screen Manitoba is the media production industry association. The National Screen Institute is a nationally recognized training centre for established and emerging film and television writers, directors

and producers offering unique intensive classroom training (in Winnipeg and across the country), followed by a series of mentoring opportunities.

The Industry Services division of Growth, Enterprise and Trade provides support to Film Training Manitoba through its Sector Council program.

Film Training Manitoba works closely with stakeholders to identify skill gaps and facilitate skills-based training to assist in the rapidly changing technological advancements in the industry. FTM programs provide outreach, training and workshops and recruit new workers. They also upgrade and broaden the skills of existing workers to enable them to work in multiple job positions, and increase their employability. Between productions, crew members utilize their transferable skills to take on contract work in other cultural sectors such as theatre, music and the visual arts.



The Economic Development Programs division of Manitoba Growth, Enterprise and Trade committed \$591,200 (On Screen Manitoba, 2015) in project support to OSM, targeted towards maintaining current levels of production and nourishing emerging opportunities through communications, market intelligence and industry representation; trade and investment initiatives; market development and access programs; and professional and business development for Manitoba content producers in both French- and English-language markets.

This provincial commitment made it possible for OSM and New Media Manitoba (NMM), the

industry association representing Manitoba's interactive digital media sector, to partner in leveraging \$3.89 million over three years in federal funds from Western Economic Diversification (WED). The funding is in support of a joint, three-year initiative called the Media Exchange Project (MEP). MEP includes a pan-western component with related industry associations in the western provinces for francophone business development and international trade initiatives. It positions OSM and NMM as leading industry associations in western Canada and also serves to strengthen their relationships with linear and interactive digital media producers and industry associations across the west.

### *Key Trends and Challenges*

Canada's film and television production industry is unique in that production is not centralized in one particular jurisdiction. The industry is very competitive between production centres across the country because different provinces offer varying incentives, location options and resources. Manitoba's primary competitors are British Columbia, Alberta, Ontario and Qu  bec which, due to their size and proximity to international markets, are able to offer more modest incentives. Manitoba must work harder to maintain its position and remain competitive on the world stage.

The key challenges facing the film and television production industry are:

- Adapting to interactive digital technologies
- Harnessing the resulting opportunities for growth and innovation; and
- Increasing Manitoba cultural exports, international trade, and inward investment opportunities.

### *Adapting to Interactive Digital Technologies*

Emerging digital technologies have created a profound disruption of how people make and consume audio-visual media content. While conventional television watching is still significant, Canadians (particularly young people) are watching more films on smart TVs and mobile devices than in movie theatres. Currently cable subscribers are “cutting the cord” and choosing to consume content on other platforms such as viewing by appointment, “PVR” or using online services such as Netflix, Hulu or Crave TV which are disrupting historic business models. The business of selling film and TV programs has changed, and the content creators and producers who make up the film and television production industry must adapt quickly to a new and rapidly changing business environment.

### *Support for Canadian Content*

Canada has a thriving television industry that, for decades, has supported the creation of Canadian content through Canadian Radio-television and Telecommunications Commission regulation. The Canadian Radio and Television Commission mandates a minimum requirement for Canadian content to be broadcast. It also mandates broadcasters to contribute a portion of revenues towards production of Canadian content. These funds are pooled with government contributions and administered through the Canada Media Fund and Telefilm. Canadian content regulations have been instrumental in launching and sustaining the careers of many internationally recognized Canadian artists and media content creators.

This model is under threat from two directions. Recent changes at the Commission have reduced the incentive to produce Canadian content by relaxing the requirements (e.g.

instead of needing to broadcast 50% Canadian content, it’s now 25%). Furthermore, reduced revenues from traditional broadcasting (resulting from the proliferation of alternative media viewing) in turn, reduce contributions made available through Telefilm and the Canada Media Fund for development of Canadian content.

### *Indigenous Engagement and Impact*

As of December 2015, 23% of Manitoba production companies are First Nations or M tis owned (Nordicity Group Ltd., 2013). Aboriginal people accounted for 16.7% of the total population of Manitoba.

The province supports Aboriginal New Voices, a 14-week full-time training course at the National Screen Institute that exposes young Indigenous people aged 18 to 35 to a variety of creative and challenging employment opportunities in the film and television production industry. Students are paid minimum wage throughout their training. In 2014, the National Screen Institute also launched its Aboriginal Documentary program, conceived as a development launch pad for producer/director teams looking to produce a short documentary. Applicants must submit ideas that will tell stories that reflect an aspect(s) of what the issues reflected in the Truth and Reconciliation Report – painful past, hopeful future, and all the challenges and triumphs in between. Teams are paired with an industry mentor to help with the final development and production of a 10-minute documentary. Teams receive a cash award to put towards production of their documentary and attend the Hot Docs International Canadian Documentary Festival in Toronto.



The Aboriginal Peoples Television Network based in Winnipeg, is described as the first of its kind in the world (APTN, 2016) . It is a Canadian broadcast and Category A cable television network that airs and produces programs made by, for and about Aboriginal peoples in Canada or the United States.

### *Cultural Capital Infrastructure*

The Manitoba government acquired the previously privately owned Manitoba Production Centre in 2004. The facility includes a 15,000 square-foot sound stage with additional carpentry, wardrobe, hair and wig shop space, production offices, dressing rooms, cafeteria and vehicle parking in a fenced compound in central Winnipeg. The Manitoba Centennial Centre Corporation manages the facility on behalf of Manitoba on a cost-

recovery basis. Local and visiting film and television producers pay below market rates for short-term leases of the facility.

Industry stakeholders and users of the facility have indicated that facility improvements, renovations and an expansion are necessary in order for Manitoba to appropriately attract more major motions pictures to the province. Film and television productions use hundreds of locations throughout the province, most of which are private homes and properties; however, the Manitoba government allows the use of provincial buildings, facilities, crown lands and provincial parks on a cost-recovery basis as long as the normal business of government is maintained. The City of Winnipeg also supports the use of civic facilities where appropriate.



*Courtesy of Manitoba Film & Music*



## Interactive Digital Media

### *Profile*

In Canada, interactive digital media (IDM) is defined as “digital content or environments that provide users with a rich interactive experience designed to entertain, educate and/or inform” (CIAIC, 2013). Companies considered to be part of this sub-sector generally develop interactive digital media products or services, or develop content or technology that enables interactive digital media products and/or services.

Given the breadth of the definition of interactive digital media, the industry often converges, at one end, with the Information and Communication Technologies industry; and at the other end, with the film and television production industry. This is certainly the case in Manitoba, where companies in the local

interactive digital media sector range from software developers, to digital marketing agencies, to video game developers and interactive ‘transmedia’ companies.

Only a segment of Manitoba’s overall interactive digital media industry would be considered a ‘cultural’ segment, consisting of those companies producing products, services, content or enabling technology for interactive “entertainment” media (as opposed to companies producing interactive software “tools” or websites, for example). This cultural segment accounts for 20% - 30% of Manitoba’s interactive digital media industry overall. (Nordicity Group Ltd., 2013; New Media Manitoba, 2016)

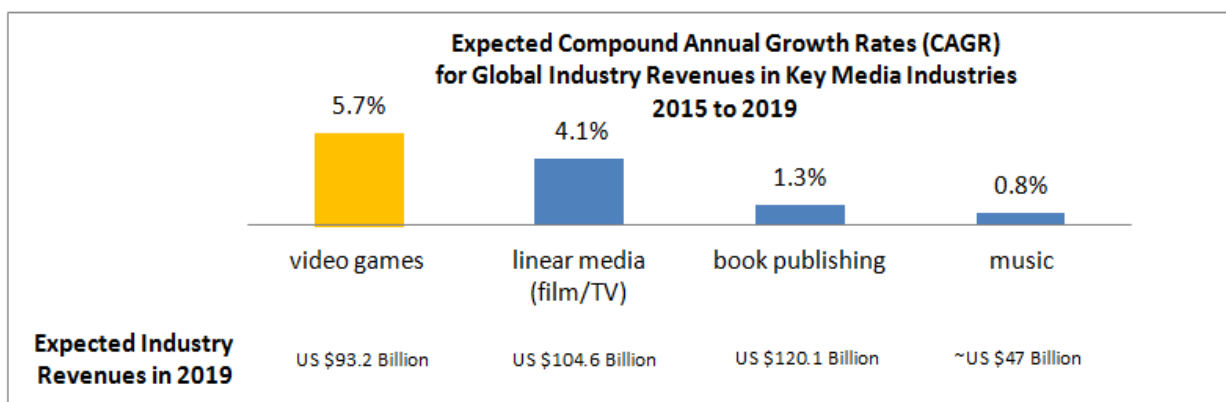


Most of the local interactive digital media companies that fall under the scope of this ‘cultural industries’ segment are video game developers. The video game subsector currently makes up at least 12% of Manitoba’s overall interactive digital media industry, and represents a powerful driver for future growth and revenue generation. This is a result of global and national trends as well as the strength-to-date of Manitoba’s existing game development firms.

- With respect to global and national trends, it is worth noting that Canada’s video game industry is roughly the third largest in the world. It contributes \$3 billion to national GDP each year, and currently employs over 20,000 people.

Perhaps most impressively, despite sluggish national economic growth over recent years, Canada’s video game industry has grown by over 31% since 2013 . (ESAC, 2015)

- Mirroring this national trend, in PriceWaterhouseCooper’s current “Global Entertainment and Media Outlook” for 2015 – 2019, global revenue growth in the video game industry is expected to outpace all other key media industries (as shown below).



Source: PWC Global Entertainment and Media Outlook 2015-2019

### *Social and Economic Impact*

Manitoba's growing interactive digital media industry is made up of roughly 150 to 200 companies (overall) <sup>1</sup>. In 2011, the sector employed approximately 700 local professionals—though given strong growth in the sector over recent years, this figure is now expected to be much higher. New Media Manitoba, the industry association representing the sector in Manitoba, maintains an online directory of local companies and professionals. Almost 2,300 people have now listed themselves on that directory as being part of the local interactive digital media sector.

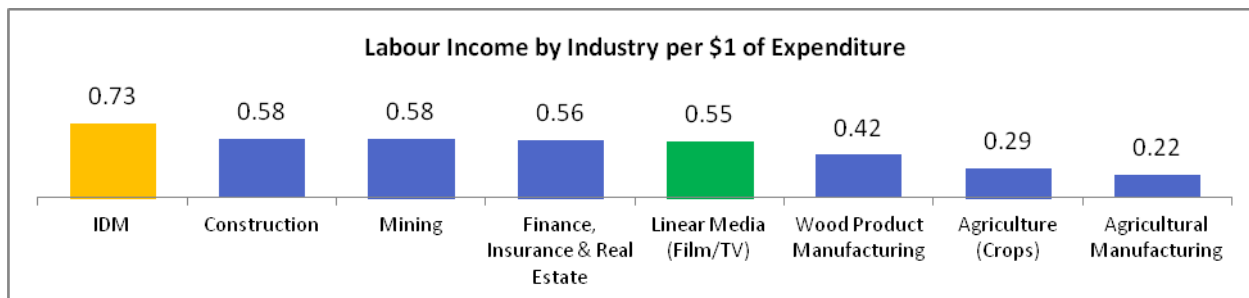
Most interactive digital media companies in Manitoba are small enterprises and the local sector is estimated to have the highest proportion of freelancers, as a percentage of total industry professionals, of all the major interactive digital media clusters across Canada. As of 2011, Manitoba's companies were seven years old on average, indicating that companies in the sector tend to be quite stable. The vast majority (94%) are Manitoba-controlled firms. The industry generated annual revenues of at least \$38.8 million in 2011 in Manitoba though given strong growth in the industry this figure is now expected to be higher. For example, revenues in Manitoba's video game development subsector alone grew by 850% between 2007 and 2010 (Economic Development Winnipeg, 2016).

This industry also contributes more to local employment and GDP, on a per dollar basis, than many of the province's most important traditional sectors, such as agriculture, finance, insurance, and construction (see below). In fact, as of 2011:

- 73¢ of every \$1 spent by Manitoba's interactive digital media industry supports employment in high-skill jobs.
- 94¢ of every \$1 spent by Manitoba's interactive digital media industry is spent here in the province, contributing to provincial GDP.
- Every \$1 million spent by Manitoba's interactive digital media industry creates 17.4 full-time equivalent (FTE) jobs.

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<sup>1</sup> Information in this section applies to the IDM sector overall, not only the segment of the industry that would fall under the scope of a 'cultural industries' definition. Unless otherwise stated, stats are taken from the most recent industry profile/economic impact report for Manitoba's IDM sector, which was published in 2012.



Source: Nordicity & Manitoba Bureau of Statistics

In addition to the industry's strong capacity to create local employment, it is worth noting that these jobs are generally high-skill and very attractive to young people. In 2011, the average age of an interactive digital media worker in Manitoba was only 32 years old, and 92% of these workers had a higher level of education than a high school diploma. The average salary across all interactive digital media positions in Manitoba, excluding freelancers, was \$44,419 in 2011.

The provincial industry is represented by New Media Manitoba, an industry association that was incorporated in 2000 and that works to grow and promote the sector through a variety of business development projects, human resource development initiatives, and technical training. Local interactive digital media companies also work with other industry associations, such as the Information & Communications Technology Association of Manitoba and On Screen Manitoba, as well as stakeholder organizations in Manitoba's 'knowledge-based industries' community, such as North Forge (formerly the Eureka Project and

Ramp Up Manitoba), the Manitoba Technology Accelerator, and Innovate Manitoba.

### Government Support

The provincial government supports Manitoba's interactive digital media industry in two ways:

- Through the Manitoba Interactive Digital Media Tax Credit
- Through annual funding to New Media Manitoba

The province provides support directly to local companies through the Manitoba Interactive Digital Media Tax Credit program. Introduced in 2008, this refundable corporate income tax credit provides qualifying Manitoba companies with a 40% rebate on the eligible labour costs (and, in some cases, the eligible marketing costs) that they spend to develop an eligible interactive digital media product here in the province.

Company uptake of the Manitoba Interactive Digital Media Tax Credit program has grown steadily since the program was introduced. It is currently the only provincial business support

program dedicated primarily to growing the local interactive digital media industry; and it is one of the key provincial programs that any local company can access to grow its business and create new jobs through the development or adoption of new technology products.

The province also provides industry development support for the sector through annual funding to New Media Manitoba. The organization uses this funding to undertake a variety of business development projects aimed at growing the sector, as well as to offer training and other professional development opportunities to local companies.

To date, the provincial government’s support to the interactive digital media industry has generated significant returns on each dollar invested.

At present, ongoing capitalization for local interactive digital media companies is 87% through self-funding and retained earnings/profit, 9% through other private-sector financing sources, and only 4% through public funding or tax credits.

### *Key Trends and Challenges*

In the most recent profiles of Manitoba’s interactive digital media industry, companies identified a number of key issues currently limiting their potential growth:

- Access to capital
- Access to markets; and
- Access to talent.

It is important to note that the critical issues outlined below have been described based on the specific needs of those 20% - 30% of companies that fall under the cultural segment of the interactive digital media sector.

### *Access to Capital*

Interactive digital media companies that create cultural products or interactive

“entertainment”, like video game developers, face significant challenges in accessing capital to finance the development of their own products (e.g. video games where they own the content / intellectual property (IP)).

Canada’s major media funding bodies and other provinces have increased support to these types of interactive media projects over recent years. For example, the Canada Media Fund created an ‘Experimental Stream’ that is entirely dedicated to funding interactive digital media products like video games, and Ontario recently introduced an Interactive Digital Media Fund that provides companies with grants to develop new products.

Manitoba’s provincial media funding programs, however, are still exclusively directed to film and television projects. Manitoba’s film and television industry had access to roughly \$2 million in 2011-12 towards up-front financing for film/TV projects (Manitoba Film and Music, 2012)

Given the challenges in accessing capital, many local video game developers and other interactive “entertainment” companies focus on fee-for-service work until they can generate enough revenue to self-finance the creation of products where they will own the content/intellectual property. This high level of contract work stymies the potential for more sustainable growth and stable revenue that the development of proprietary products can generate for companies over the long term.

**Local interactive digital media companies must maintain a national market presence to position themselves for success.**

In its most recent industry profile, the film and television production industry noted that supporting the growth of a stronger interactive digital media sector in Manitoba will be of key importance in achieving ongoing competitiveness for Manitoba's film and television production sector as well. Interactive digital media industry stakeholders have noted that better access to capital could be a significant step forward in meeting the goals of growth, job creation, and ongoing competitiveness in both sectors.

### *Access to Markets*

Maintaining an ongoing and meaningful presence in key national and international markets, with associated contacts, is critical for Manitoba's interactive entertainment companies, like video game developers, to successfully commercialize their products and attract new contract work and clients.

Interactive digital media projects and companies are currently mostly excluded from the provincial funding programs that provide market access support, such as the the Province's Commercialization Support for Business program and the 'Access to Markets/Festivals' program administered by On Screen Manitoba.

Though the Manitoba Interactive Digital Media Tax Credit is structured to provide marketing support in some instances, market access activities are generally only supportable at very low rates (e.g. 20% of eligible costs). Other provinces have launched funding programs to support market access activities for interactive digital media companies (eg. Ontario's IDM Global Market Development Fund). No such supports currently exist in Manitoba.

Local interactive digital media companies must maintain a national market presence to position themselves for success. The geographic isolation of Manitoba from 'hubs' along the east

and west coasts of the continent has forced many firms to look at moving out of the province, particularly as they begin to build success or attract private investment.

### *Access to Talent*

Companies in the interactive digital media sector require access to highly skilled workers. Technical positions in particular are often highly specialized and evolve rapidly.

This puts pressure on interactive digital media companies to find 'top' talent, and to provide their employees with ongoing, on-the-job training. Local companies have noted that when they hire recent graduates out of Manitoba's post-secondary computer science and/or interactive digital media programs, these new employees typically require 1 – 2 years of on-the-job training or 'up-skilling' to meet industry standards for their positions.

**New graduates typically require 1 – 2 years of on-the-job training to meet industry standards.**

Interactive digital media firms also have difficulty finding staff with management and/or sales and marketing expertise, given that business development, project management, and product commercialization strategies for this industry are unique. Without a large pool of local talent with these capabilities, companies must try to attract people with the right expertise to come to Manitoba from cities or regions with more developed interactive digital media clusters.

The industry has a powerful ability to help keep young Manitobans living and working in our province. As noted above, the industry creates high-skill, well-paying jobs that are highly



attractive to young people. Local firms have signaled a need for supports to help them hire and up-skill local graduates—before those students look outside the province for opportunities in their chosen careers. A number of other provinces, such as Nova Scotia and PEI, provide wage subsidies for up to one year of support when companies hire and train a recent graduate in a high-skill job.

A number of new initiatives, including industry-academic working groups, have been formed to begin addressing ‘access to talent’ issues across the interactive digital media, information, communications and technology and other ‘creative industries’ sectors. A strategic, coordinated approach to these efforts will be critical to maximize their potential impact.

### *Indigenous Engagement and Impact*

There is an identified under-representation of Indigenous people in Manitoba’s interactive digital media industry (as is the case with other diversity groups, such as women and persons with disabilities).

## Music Industry

### *Profile*

Over the past decade or more, Manitoba’s music industry adapted to a rapidly changing business environment and evolved into a well-established growth industry that contributes an increasingly significant portion towards the economic impact of Manitoba’s creative industries.

This vibrant industry is largely composed of self-employed artist entrepreneurs and small or micro-enterprise music companies. It has a workforce of primarily younger creative workers and strong representation of Francophone and Indigenous artists and companies. Many have boot-strapped their businesses from the ground

up with sweat equity and a strong creative focus. Manitoba’s music creators have a greater per-capita impact nationally and internationally than other Canadian jurisdictions as a direct result of government’s continued investments.

### Manitoba’s music creators have a greater per-capita impact nationally and internationally than other Canadian jurisdictions.

Manitoba artist entrepreneurs continue to garner industry accolades and receive national and international music industry awards. Our industry professionals do business around the world and are recognized locally and internationally for musical excellence, cultural diversity and business acumen.



A critical partner in the success of Manitoba’s music industry is Manitoba Music. The member-based, not-for-profit industry association has more than 750 members in all areas and genres of the music industry. Manitoba Music’s programs and services provide information, education, communication, advocacy, industry development, and networking opportunities that develop and promote industry growth and sustainability. It operates a resource centre and a progressive and interactive website. It delivers comprehensive music industry training

workshops, market development programs, a pan-Western Canadian Francophone music development initiative, and the only Aboriginal music program of its kind in the world.

Manitoba Music is often cited as a model for music industry development in Canada and has an extensive record of delivering impactful, industry-driven programs for the Manitoba music industry through its ongoing partnerships with federal, provincial, and private sector partners.

### *Economic Impact*

According to an independent economic impact study by Nordicity in 2011, the Manitoba music industry contributed almost a quarter of the total economic impact of the Canadian music industry outside of Quebec in 2011 (Nordicity Group Ltd., 2012).

The study indicates the music industry contributed \$71.3 million to Manitoba's GDP and generated 4,363 full time equivalent jobs (Nordicity Group Ltd., 2012).

The contribution to GDP represents an increase of 17% from in 2004. Nordicity attributes this increase primarily to artist entrepreneurs, whose output share of the GDP impact has more than doubled from 14.1% (\$7.8 million) in 2007 to 29.6% (\$21.0 million) in 2011. This shift may reflect the changing roles of artist entrepreneurs and music businesses, which are taking on a wider and more universal range of activities. These increases, signifying the rise of the artist entrepreneur, may also be indicative of the democratization of the music business, including lowered barriers to entry and enhanced business practices.

### *Government Support*

Provincial support for the music industry comes primarily from the Arts Branch and Growth, Enterprise and Trade. This support includes operating funds to Manitoba Music by the Arts

Branch, development programs offered through the Manitoba Film and Music provincial Crown corporation, and support to professional artists offered through the Manitoba Arts Council. The objectives of provincial support have been to assist the industry in market development initiatives, accessing new markets, providing internships, increasing cooperation with other jurisdictions' music industry associations and building business capacity.

Manitoba's primary support for the music industry is administered through Manitoba Film and Music, the Crown agency responsible for music, film and television production industries. In 2014-15, Manitoba Film and Music invested in Manitoba's emerging and established musicians through funding 130 music projects. Projects were funded through the Music Recording Production Fund, the Recording Artist Touring Support Program, the Record Marketing Support Program, the Music Video Fund, and the Music Recording Production Fund for Out-of-Province Artists (Manitoba Film and Music, 2015). Manitoba Film and Music also attends and supports a variety of music festivals, conferences and showcases to effectively market Manitoba artists and create business networking opportunities.

### *Key Trends and Challenges*

The most important trend impacting the Manitoba music industry is the disruption of the industry by digitization and globalization. The three key issues arising from this disruption are:

- The need for alternative and diversified revenue streams in response to plummeting sales of physical recordings
- The fundamental imperative of accessing international markets to be sustainable; and

- The undercapitalization of small companies which poses the greatest barrier to achieving either of the above.

### *Alternative Revenue Streams*

Like other cultural content industries, Canada's music industry has undergone profound changes as a result of the digital revolution. While music is more accessible than ever before, sales of recorded music and compact discs have dropped sharply. Physical music sales have been replaced by live streaming and downloading, and copyright holder revenues are under constant threat from the "consumers rights take precedence" approach taken by international regulators. Revenues generated from digital download or online streaming services have therefore not come close to making up for the sharp decline in sales of recorded music.

The many players in the national music industry – composers, performers, producers, distributors, publishers, record companies, live music venues and festival and concert promoters – face diverse challenges in adapting to the new digital environment (The Standing Committee on Canadian Heritage, 2014).

In recent years, market instability has evened out somewhat through the efforts of forward-thinking artist entrepreneurs and music companies emerging with new and agile business models that are better suited to meet the challenges and opportunities. Music fans now have gravitated back to live music experiences and direct relationships with artists, and through social media that may include access to new and unique digital cultural products. These changing revenue streams and the need for a diversification of business practices have created opportunities for small, niche-focused companies; however, music industry companies and musician entrepreneurs need the right tools and support to pursue new markets and build new types of

business partnerships. This is where government interventions have already played a pivotal role in empowering our cultural industries to excel on the world stage.

### *Access to International Markets*

In today's music market place, local or regional product releases have become ineffective, as all music created in the digital economy is now a global release. This has significant implications for artist entrepreneurs, as consumers have access to the music regardless of the market it was targeted towards, or existing relationships with the artist. Media buyers and consumers may show little interest in music that was previously released elsewhere. Music businesses across the globe need to be involved in the first release of new product, making every release global in scope. A plan for success for Manitoba's music industry must therefore include a sophisticated export marketing strategy in order to access international trade markets.

Manitoba's industry has significant barriers to growth due to our geographic isolation and lack of direct access to international content buyers, marketing capability, and access to capital. Few Canadian music industry companies can sustain themselves by operating in the Canadian market alone. Manitoba companies must engage in international market research and travel, and forge international business relationships through regular contact.

Access to capital was ranked as the number one barrier to growth by musician entrepreneurs and companies.



### Access to Capital

A lack of capitalization of small music industry companies is a chronic problem and a significant challenge emphasizing the need to adopt new and innovative financing strategies that can attract both private sector investment and support from public funds. Access to capital was ranked as the number one barrier to growth by both musician entrepreneurs and companies in *Sound Check: An Economic Impact Analysis of the Manitoba Music Industry* (Nordicity Group Ltd., 2012).

### Indigenous Engagement and Impact

Manitoba Film and Music is helping to foster Indigenous talent in Manitoba by supporting the Aboriginal Music Program administered through Manitoba Music. This program helps First Nations, Métis, and Inuit people develop sustainable careers in Manitoba's music industry, and delivers programming and services that respond to the needs of the industry. The Aboriginal Music Program, in existence since 2004, is the only program of its kind in Canada (Manitoba Film and Music, 2015).

Manitoba has a growing, dynamic Indigenous music community which faces many of the same challenges of the wider industry as well as some unique barriers. In order to secure the success of Aboriginal music development, there is a need for increased awareness and communication, culturally specific market research, development of culturally sensitive service providers, and flexible support programs.

## Manitoba Publishing

### Profile

The Manitoba Publishing industry is involved in the creation, publication, and dissemination of literature with primarily Canadian and Manitoba

content in either book or magazine format. Most Manitoba book and magazine publishers are medium, small or micro sized businesses and may employ only one to three employees on a full-time, part-time or contract basis.

As of 2016, Manitoba has 18 book publishers (two French, 16 English), and more than 30 magazine publishers. They are supported in Manitoba by two industry associations:

- The Association of Manitoba Book Publishers, and
- The Manitoba Magazine Publishers Association.

Nationally, they are supported by the Association of Canadian Publishers and Magazines Canada.

Other related stakeholders in Manitoba's publishing industry include the Manitoba Writers' Guild, the Writers' Collective, the Aboriginal Writers' Collective, the Manitoba Editors' Association, and the Winnipeg International Writers Festival, as well as numerous writers groups.

The writing and publishing community hosts two awards ceremonies to foster excellence and recognize the achievements of Manitoba publishers and writers.

Manitoba book publishers produce an estimated 140 to 150 print and electronic books annually, in English and French, and in a variety of forms and genres (fiction, non-fiction, poetry, drama, biography, children and Young Adult, and educational texts).

Manitoba magazine publishers are involved primarily with producing in-print periodicals available on a regular cycle, as single issues or through annual subscriptions.



## Manitoba book publishers pay more than \$2 million in wages, salaries and benefits per year.

### *Social and Economic Impact*

Of the \$1.7 billion in total culture GDP in Manitoba in 2014, written and published works accounted for \$432 million. Written and published works also accounted for 5,517 of the 21,565 total culture jobs in Manitoba (Statistics Canada, PTCI 2010-2014) (Statistics Canada, 2010).

The department estimates that Manitoba book publishers pay more than \$2 million in wages, salaries and benefits on average per year. The sector employs Canadians and Manitobans either as full-time or part-time employees directly, or as freelancers and independent contractors.

Our book and magazine publishers give Manitoba writers an opportunity to tell Canadian and Manitoba stories. Their production of Canadian and Manitoba content recognizes and celebrates our local and regional identities. These books and magazines also inform their readers by providing cultural, business, educational or general consumer content from a Manitoban perspective. Literary performance – spoken word events, storytelling, readings and festivals – also derives from this sector, and partnerships with libraries help promote and market authors.

### *Government Support*

The Province of Manitoba supports the publishing industry through tax credits, operating grants, marketing program grants, special project grants, governance, management and professional development support, two English book awards, and one French book award.

Individual writers and arts groups serving writers are eligible for provincial support to the professional arts through the Manitoba Arts Council.

Provincial support for book and magazine publishers flows through the Arts Branch, and through the Manitoba Arts Council. The majority of book publishers are able to access funding through both. By contrast, magazine publishers are much less likely to access Manitoba Arts Council funding, and rely more upon the Arts Branch.

The Province established the Manitoba Book Publishing Tax Credit in 2008. Based on labour and production costs, this tax credit amounted to \$590.0 million in 2014-15. Ontario, British Columbia, and Québec are the only other jurisdictions in Canada to offer a book publishing tax credit. Manitoba also offers the Cultural Industries Printing Tax Credit based on labour and production costs which amounted to \$1.1 million in 2014-15.

Provincial support through the Arts Branch is not available to self-publishing individuals, newspaper and tabloid publishers, free publications, exclusively digital publications, directories, catalogues, phone books, calendars, map books, colouring books, or activity books.

### *Key Trends and Challenges*

The primary issues impacting both book and magazine publishers in Manitoba are:

- The digitization of creative content
- Rising costs and undercapitalization
- Copyright issues

### *Digitization*

The increasing demand for digital content requires book and magazine publishers to implement new skills, new technology and new business models in order to produce and market electronic copy. The small size of most Manitoba publishing companies means they struggle to find the human and financial





resources to fully adapt to this environment. The distribution and marketing of electronic content also require different processes from those of print media. The need for two entirely separate processes for print and for digital publications places increased demands on both book and magazine publishers.

Although the majority of Manitoba book publishers use *OverDrive* (or a similar aggregator service) to distribute their e-books, several use multiple vendors for wider distribution, as do magazine publishers. These vendors utilize a variety of electronic formats, so publishers must constantly update the 'meta data' for their e-publications. As a result, production of e-books or e-mags regularly involves multiple platforms and formats (for web, mobile, e-pub) and selling models, such as their own websites or the various vendors.

While most Manitoba book publishers already produce e-books concurrently with in-print copies, for most, e-book sales account for less than 10% of their revenues. Most book publishers have not digitized their entire backlists because of the human and financial capital required. While the resources required to produce, market and maintain e-books bring little return, it is widely understood across the industry that e-books are a necessary marketing tool for a publishing house in general.

Manitoba magazine publishers are struggling to find new business models and adapt to the same issues of production, distribution and marketing. They are also addressing questions of what content to make digital – whole issues, excerpts, or only additional or supplementary material – as well as how to charge for digital editions.

### *Rising Costs and Undercapitalization*

The lack of sufficient capital in small publishing companies presents a significant challenge to their ability to adapt to digitization and transition to new production and new revenue models, as well as to reach new markets.

Print magazine publishers are impacted by regular increases to postal rates. Changes to the Copyright Act and the broad interpretation of the 'fair-dealing guidelines' coupled with an increased use of digital materials in the classroom has dramatically impacted the profitability of K-12 educational publishing.

### *Copyright Issues*

The Copyright Modernization Act was implemented in June 2012. Amendments to the Act included adding "education" to the list of exceptions when using copyrighted material, applicable to K-12 schools and post-secondary institutions in Canada with the exception of Québec. It was pursued by representatives of the education sector as an attempt to reduce costs and meet fiscal challenges in their sector. The Fair Dealing Guidelines in the Copyright Act permit the use of a copyright-protected work without permission from the copyright owner or the payment of copyright royalties. In July 2012, the Supreme Court made a decision that clarified "fair dealing" to mean that: educators may make copies of short excerpts of copyright-protected works for students in their classes.

Many within the education sector, however, have interpreted these guidelines to mean that its members are effectively not required to pay copyright royalties or licenses for the copying of any copyright-protected works, stating that they are authorized to copy for free under the "fair dealing" provision. Since the introduction of these guidelines, the Canadian publishers and authors of materials photocopied in Canadian schools and education centres have received little or no compensation for the use of their material. Access Copyright and other sources



have noted that the new provisions have put tremendous pressure on educational publishers across Canada.

## The development and production of Canadian-content educational texts for the K-12 market has been put at risk.

Some are warning that the development and production of Canadian-content educational texts for the K-12 market has been put at risk.

### *Indigenous Engagement and Impact*

The department is aware of at least one major Indigenous-owned magazine and one Métis-owned book publisher in Manitoba. Another book publisher has a separate imprint solely for publishing Indigenous books. Three other book publishers consistently publish work by Indigenous writers on Indigenous topics. The Manitoba Arts Council provides support to help address barriers encountered by Indigenous artists of all traditional disciplines including writing. The writing and publishing community has also recently created a book award for Indigenous writers.

## Visual Arts and Fine Craft

### *Profile*

The visual arts and fine craft industry in Manitoba is comprised of the sale, marketing and distribution of visual art and fine crafts by mostly, though not entirely, Manitoban artists and artisans. These works include but are not limited to paintings, sculpture, pottery, multi-media, photography, fibre arts and drawings.

Manitoba is home to over 50 galleries; approximately 25 are commercial galleries. Two of these have satellite offices in Toronto and Calgary, but they are the exception as most Manitoba galleries are very small businesses. Nine of the remaining 25-plus not-for-profit or artist-run galleries do engage in commercial sales, taking commissions on sales of work by artists represented in their gallery. This is peripheral to their primary work serving artists and fostering arts in their communities.

### *Social and Economic Impact*

The Visual Arts and Fine Craft industry drives the development of excellence in the field. It helps to share the unique identity and aesthetic of Manitoban artists/artisans; beautify our spaces; provoke thought and dialogue; preserve traditional skills while supporting the evolution of contemporary practises; and builds our reputation outside of the province as a vibrant creative place.

### *Government Support*

The Province of Manitoba provides marketing grants, financial support towards trade show presence outside Manitoba, operating and project grants, and support for the professional and creative development of artists and artisans.

These supports go to commercial galleries and to non-profit artist run galleries. They flow through Sport, Culture and Heritage, in particular through the Arts Branch which provides marketing grants to commercial galleries, and through the Manitoba Arts Council which supports professional artists and professional arts organizations. They also flow through Growth, Enterprise and Trade which supports training and professional development through sector councils such as the Arts and Cultural Industries Association of Manitoba.

## Key Trends and Challenges

The key issues facing the Visual Arts and Fine Craft industry are:

- A “flat-lining” of sales within Manitoba and the need to access new markets
- Technological impacts on their business models
- A lack of capital

### Access to New Markets

Outside of a few larger and highly successful exceptions, the majority of Manitoba galleries are operating sustainably or with small profit margins. The growing importance of an online presence and ability to facilitate electronic sales requires additional human and financial resources that not all galleries can spare, which represents a significant lost opportunity.

### Technology

The widespread availability of online tools has made it easier than ever for professional artists, artist entrepreneurs and even Pro-Ams (professional amateurs) to represent themselves, build relationships with their market, and conduct their own sales. To maintain viability, commercial galleries must clearly demonstrate the value added by their services.

### Ability to Invest in Physical Space

It is the Visual Arts and Fine Craft industry, more than the other creative industries, which has historically been most closely associated with live/work spaces which are still in demand. It is also interesting to note that almost none of the galleries in operation in Manitoba own building space. Owning gallery space has proven very difficult and many have found leasing properties to be more sustainable profit-wise.

## Indigenous Engagement and Impact

While work by Indigenous artists is represented in a number of Manitoba galleries at any given time, there are currently two Manitoba commercial galleries that specialize in Indigenous arts. A third gallery recently closed its doors after many years in operation, citing lack of profitability. One significant factor was that historic pieces in the collection have not increased in value as much, or as consistently as expected, compared to the past.



Courtesy of the Winnipeg Art Gallery

## Questions About Cultural Industries

1. What are the barriers to Manitoban producers harnessing the full potential of their intellectual property? What can be done to alleviate or eliminate these barriers?
2. What can be done to maximize the creation of Manitoba content? What can be done to increase consumer access to Manitoban content?
3. How can a new cultural policy ensure the full range of diverse Manitoban voices and stories are expressed, represented and developed in the creative industries (including those of women, ethno-cultural minorities, people with disabilities, urban/rural and Indigenous peoples)?

4. Is the operating model of our creative industries development organization, Manitoba Film and Music, still appropriate? How can it be modernized or improved?

## 7. Heritage

### Profile

Manitoba's Heritage sector refers to tangible or intangible resources that an individual, organization, community or government determines to have value, as an inheritance from the past and a legacy for current and future generations.

Identifying, safeguarding and conserving heritage resources is a shared responsibility. Volunteers, community organizations and municipal authorities are keeping their local heritage alive as an integral part of their community infrastructure and quality of life. Organizations such as the Manitoba Heritage



*Courtesy of the Association of Manitoba Museums*

Council and Association of Manitoba Museums work to enable and support this extensive network. Volunteers are crucial to this sector, far outnumbering paid staff and expending over 400,000 hours in 2015 (MMA, 2015).

Heritage can be mutable, subject to the knowledge, awareness and beliefs of people in a certain place and time, and constantly open to re-interpretation by successive generations,

that is, if the physical reminders of a passing era and information about it have not been irretrievably lost.

Impending loss, damage, destruction, or the slow, steady, quiet disappearance of that which once was common but is now rare, irreplaceable, and on the verge of extinction, is often what triggers efforts to safeguard and preserve what is now perceived as important to honour, remember, and keep intact as a touchstone with the past.

Manitoba's physical heritage can be categorized as either immovable or movable. Immovable resources include archaeological or historical sites, buildings of architectural merit, landmarks, landscapes, etc. where conservation of a sense of place is valued. Moveable resources are those collections of objects that can be housed in archives, libraries, museums, etc. for study, care, interpretation and display.

Manitoba's heritage resources as defined in The Heritage Resources Act include sites, objects and any work or assembly of works of nature or human endeavour that are of value for their archaeological, palaeontological, pre-historic, cultural, natural, scientific or aesthetic features in the form of sites or objects or combination of both.

Manitoba has over 10,000 known heritage sites fitting this description. The Heritage Resources Act requires that a register is maintained of all known heritage sites. The register is used to monitor development proposals and assess potential impact on heritage resources.

There are 125 Manitoba properties designated as of provincial significance; 94 contain buildings or structures. Municipalities have

protected an additional 391 properties under enabling powers in The Heritage Resources Act. The City of Winnipeg has designated 253 properties under the Historical Resources By-law through enabling powers in The City of Winnipeg Charter Act. Provincial commemorations include 200 heritage site markers throughout the province. In addition, community groups have commemorated people, places, and events significant to their communities utilizing the Heritage Grants Program.

Manitoba museums are not-for-profit permanent institutions engaged in conserving, preserving, studying, interpreting, assembling and exhibiting to the public, for the instruction and enjoyment of the public, objects and specimens of educational and cultural value including artistic, scientific, historical and technological material.

Manitoba has 166 community museums (the majority outside Winnipeg) with the province providing support to 115 community and signature museums with total annual visitation of 318,160 (2014); and one provincial museum, the Manitoba Museum, with total annual visitation of 565,044 (2015).

There are also several world class archival institutions (see Archives profile) among a total of 33 accredited archives across the province and several non-accredited archives.

Heritage conservation is a shared responsibility, involving volunteers and not for profit institutions as well as all levels of government. There are approximately 50 Municipal Heritage Advisory Committees established under The Heritage Resources Act, tasked with protecting and promoting local heritage resources for their municipalities. These municipalities inventory and assess their resources as authentic representation of community identity as well as

having the potential to be developed as heritage tourism products.

The Historic Resources Branch has responsibility for administration of The Heritage Resources Act and related grant programs. It works closely with other departments and government agencies on provincially owned properties. Two key departments include Finance, which manages 52 properties with heritage value, and Sustainable Development, which manages 32 sites and buildings having heritage significance.

Other key stakeholders in heritage include the Universities of Brandon, Manitoba and Winnipeg; the Association for Manitoba Archives; the Association of Manitoba Museums; the Manitoba Archaeological Society; Manitoba Genealogical Society; Manitoba Historical Society; Heritage Winnipeg; the Winnipeg Architecture Foundation; Soci t  historique de Saint-Boniface; and the Jewish Heritage Centre of Western Canada Inc.

## Social and Economic Benefits

A comprehensive study of the economic impact of heritage resources in Manitoba has not been undertaken. There are many understood benefits to our province including the contribution of heritage resources to community quality of life, sense of identity, and unique character. These factors help sustain and grow economic development by increasing the attractiveness of a community to business, residents and tourism. While recognized as underestimated, Statistics Canada reported the direct economic impact of the Heritage and Libraries domain on GDP in 2014 in Manitoba as \$50 million. This excludes governance, funding and professional support offered by all levels of government. Future enhancements by Statistics Canada to the Cultural Satellite Account are



aimed at providing a more accurate and complete estimate (Statistics Canada, 2016).

### *Facilitation of Development*

Resource industries such as hydro-electric, oil and gas, mining, forestry and major capital projects are required by legislation to engage professional archaeological consultants at their cost, if initial screening identifies potential impacts on archaeological resources. Using an inter-disciplinary approach across government agencies and preventative measures like predictive modelling and ongoing monitoring can help prevent work stoppages.

### *Place Making*

Historic buildings are often important community landmarks, integral to vibrant, prosperous and healthy communities. Preserving or rehabilitating these buildings can recreate or bolster the unique character of a community. A few examples of recent rehabilitation projects that have made major positive contributions include Innovation Alley and the Paterson Global Foods/Red River College Student Residence in Winnipeg's Exchange District, and West End Commons (formerly St Matthews Anglican Church) in the West End, as well as Brandon's Central Fire Hall and Display Building No. 2 (still in progress).

Heritage infrastructure includes not only designated heritage buildings, monuments and museums, but the sites, parks, other historic buildings, streetscapes and districts that make up a community. This heritage infrastructure enhances community pride and social cohesion and is a key component of Manitoba's tourism industry.

Research by Travel Manitoba has identified heritage tourism (especially museums and historic sites) as a high priority for their target market. Identified and protected as unique heritage sites that distinguish a community as

distinct from others, these irreplaceable resources support and encourage tourism by providing visitors an authentic experience. They also provide valuable locations for the media production industry in Manitoba.

Heritage conservation should always be considered in the implementation of broader government initiatives to enhance life and social fabric. For example, historic buildings can play a major role in projects around social housing, neighbourhood revitalization, and small business incubation.

Bringing vacant and underused buildings back to productive life creates business opportunities and adds to the local tax base. Because they offer a variety of spaces and a wide range of rents, historic buildings are especially well-suited to new businesses and small retailers.



*Courtesy of the Association of Manitoba Museums*

As communities look at their new economic opportunities they must also be judicious in their selection and repurposing of heritage resources in community sustainable initiatives. Through cooperation, various departments and levels of government can achieve more by working together: Main Street revitalization projects can go hand in hand with small-town business district historic preservation. Maintaining viable, functional heritage buildings has a variety of benefits. It keeps materials out of landfill sites. Re-using existing buildings and materials, retrofitting where appropriate, often

provides the same level of energy efficiency as new buildings, but at a lower cost. Heritage building conservation is also more labour intensive than new construction, providing opportunities for specialized skills training and quality employment. Restoration creates more and better jobs than new construction (typically 1.5-2 times more jobs than new builds) (Werna, 2009) as these projects require a higher proportion of the budget spent on labour as compared to the money spent on raw materials for new construction (Haspel, 2012) (Badger, 2011). Restoration of individual buildings can significantly raise property values in the surrounding area, thus benefitting a wider neighbourhood (Canada's Historic Places, 2006).

## Government Support

Manitoba government support to the heritage sector consists of the services and funding programs provided through the Historic Resources Branch (HRB) of the Sport, Culture and Heritage department.

Grants provided by the department support museum operations and maintenance; the restoration, stabilization, preservation or rehabilitation of heritage resources; and projects or programs that help to research, identify, protect or interpret Manitoba's human and natural heritage.

Provincial funding programs include: community museum operating grants to protect and interpret Manitoba's heritage resources; programming grants to showcase special collections, to enhance the tourist visitor experience, and to preserve and promote Manitoba's heritage; and project grants for designated heritage buildings and for non-capital projects.

The Designated Heritage Building Grant Program (DHBG), introduced in 1987, supports conservation of designated heritage buildings

throughout the province regardless of use or ownership.

The Heritage Grants Program funds one-time, non-capital projects in the heritage field. Manitoba communities, First Nations, institutions, non-profit organizations and individuals use Heritage Grants Program funding to carry out a wide range of projects, including historic site inventories, interpretive signs, exhibitions, oral histories, object conservation, archaeological investigations, and archival work to identify, protect and celebrate Manitoba's diverse heritage

HRB provides the following services and fulfills the following regulatory/monitoring functions:

- Screen development proposals to determine if there may be potential impact on archaeological resources; advise developers on impacts and potential need for impact assessment; set permit conditions and issue heritage permits for heritage resource impact assessments.
- Report, investigate, recover and reburial of human remains found outside of a recognized cemetery not of forensic concern to law enforcement.
- Provide storage of artifacts discovered through development activity as all such findings are Crown owned under the Heritage Resources Act.
- Negotiate with developers on a wide variety of initiatives on acceptable planning, research methodology, design and site work; plan and conduct field work and inspections related to permits.
- Maintain inventories; manage provincial heritage designations; advise on municipal heritage designations; prepare Statements of Significance to support the designations; conduct historic place sustainability

assessments; and provide building conservation expertise.

## Key Trends and Challenges

Some key issues important to the heritage sector are:

- Rural depopulation
- Community planning and incentives
- Climate change
- Technological innovation
- Chronic underfunding
- Long term sustainability

### Rural Depopulation

Statistics Canada reports overall growth in Manitoba of 13% for Winnipeg and 1% for all other municipalities from 1971-2006. Two-thirds of Manitoba municipalities saw a decline in population during that time. This demographic shift brings with it a number of challenges. Rural and small urban communities and institutions face an aging population, with associated difficulties in finding both volunteers and audiences for their activities. At the same time, many of Manitoba's iconic buildings types are associated with these depopulating regions. Much beloved structures like grain elevators, barns, water towers and train stations tell the story of the province's settlement history but are slowly disappearing.

### Community Planning and Incentives

From communities experiencing population decline, to urban centres attempting to preserve character neighbourhoods and streetscapes, there is a growing recognition that saving individual buildings requires broader district planning and greater private investment. This view is reflected among building owners, volunteers, business and non-profit organizations.

Manitoba's heritage buildings are diverse in type, location and purpose. They range from grand to modest; serve commercial, residential or non-profit needs; are found in isolated locales, small communities or in the heart of a city. An equally diverse range of tools and incentives for private development is therefore required to assist owners in conservation efforts or repurposing. It is necessary to identify and pursue a variety of measures at all three levels of government that complement each other and a range of development and investment models. Examples include ongoing property tax relief, income tax credits and direct grants.

### Climate Change and Historic Places

Maintaining viable, functional heritage buildings can help address climate change. The environmental footprint of historic buildings is smaller than that of new construction, even compared with contemporary buildings designed to be energy efficient. Heritage buildings were designed to capitalize on available natural light, heating, cooling and ventilation.

Embodied energy is the energy and resources already expended to create heritage structures. It would take many decades for a new building to offset the environmental impacts of the loss of this embedded energy. Conserving buildings also avoids impacting landfill sites (as much as 30% of landfill waste is produced by the construction industry), and virtually eliminates costs related to the transport and acquisition of new raw materials.

The publication entitled, *Building Resilience: Practical Guidelines for the Retrofit and Rehabilitation of Buildings in Canada* (Mark Thompson Brandt Architect and Associates Inc., 2016) illustrates how the conservation of heritage buildings can contribute to energy

efficiency, sustainable development and achieving provincial environmental policy initiatives. The adaptive re-use of historic buildings (as opposed to constructing new ones) strongly supports Manitoba's sustainable environmental and economic policies.

### *Technological Innovation*

The "digital transformation" is slowly but surely changing how historical sites, objects and records are kept and used by heritage organizations, professionals and volunteers for interpretation and offering public services, although not as fast as general public demand. This transformation requires new models of support and new resources to assist heritage groups to acquire training and new technology.

Museum training programs (Association of Manitoba Museums, U of W) and emerging programs (Brandon University) are working to be responsive to the emerging needs of the museum community.

Archaeological consultants working on behalf of major industries (e.g. oil and gas, forestry, mining, and hydroelectric development) to determine potential impact on archaeological resources are accustomed to the level of online services available in other prairie provinces, which Manitoba is currently unable to match.

### *Long Term Sustainability*

In the heritage sector, legal responsibilities and strategic planning often require time to demonstrate positive results. Short-term planning cycles, particularly within a challenging fiscal environment, can create a barrier to long-term vision and strategic planning for healthy vibrant heritage sector.

A number of constraints to longer term heritage conservation activities must be overcome. Outside the Tax Increment Finance legislation, a limited number of incentives are available to

encourage private sector investment in heritage or assist heritage building owners. Existing programs are too often directed more toward short-term street and building facade enhancements than at sustainable heritage conservation work.

The requirements for heritage building upgrades to comply with the Manitoba Building Code, a code designed primarily for new construction, has been viewed as a disincentive, prompting both the development community and municipal governments to call for the inclusion in the code of compliance alternatives for heritage and existing buildings.

Another disincentive to the undertaking of long-term conservation projects is the scarcity of trained heritage tradespersons, especially in rural Manitoba. Greater training opportunities should be developed for carpenters and masons interested in building conservation.

Religious Architecture (a distinct sub-type of heritage building) has been especially challenging. Several religious communities require ongoing support to assist them in selecting and conserving their more significant buildings. In some cases, both technical and financial support is needed as an appropriate range of alternative re-uses suitable to the community needs is considered for surplus religious infrastructure.

### *Challenges and Opportunities*

The underlying fabric of this section has been that the telling of the story of Manitoba, and its people is a collaborative effort. The challenge that is before us is how this heritage is sustained, safeguarded and made meaningful for future generations.

In 1987, the Designated Heritage Building Grant Program was established; and, is the only provincial program that specifically targets and

supports conservation of designated heritage buildings regardless of building type, how it is used or who owns it, supporting a wide range of projects including commercial, residential, and non-profit entities throughout the province.

In 1993, the Community Museum Grant Program and the Heritage Grants Program were established. Both of these programs were established to support the significant volunteer contributions made in this sector throughout the province. Over 32,000 volunteers provide 15,333 days of volunteer effort to support Manitoba community museums annually (2014-15).

Over the course of the last number of years, as we continue to diminish as a national leader in this field, the sector has seen the quality of programming for museums impacted as well as the needed capital/operating support declining.

While this remains a challenge it also presents an opportunity. Other jurisdictions, such as the United Kingdom, Scotland and Australia with their long-established National Trust models, and the Ontario Heritage Trust, have abandoned a traditional delivery model and sought out partnerships to create an environment where the conservation, protection and preservation of the heritage of their communities is secured and is utilized for the purposes of education, research and the enhancement of tourism opportunities. Is it time for Manitobans to look at these models to fully realize our heritage opportunities?

## Indigenous Heritage

In recent years there has been increased recognition of the importance of Indigenous people to speak for themselves, to determine how they are represented and by whom, and to be involved in developments affecting them. The Truth and Reconciliation Commission Report acknowledges Indigenous rights to self-determination and recommends increased cooperation between museums and Indigenous communities. There is opportunity for greater inclusion of Indigenous perspectives across all aspects of heritage conservation especially relating to the research, care and custody of cultural materials and the representation of these materials and of the role of Indigenous people throughout our history.

Indigenous archaeological sites are essential to understanding and sharing the history of our province. Conservation of these sites and their contents is a shared interest of the heritage sector and of Indigenous communities. More work needs to be done in order to ensure that culturally sensitive sites and artifacts are treated with respect and preserved for future generations.

## Questions About Heritage

1. What should be reflected in the province's priorities for heritage preservation?
2. What changes should be undertaken to ensure heritage conservation is always considered in the implementation of broader government initiatives to enhance community and economic well-being?
3. Could a partnership between the community and government benefit the preservation of heritage resources in Manitoba? Do you believe Manitobans would participate more fully in the preservation of our heritage assets if there were expanded opportunities to sponsor,



partner, or donate? Are our heritage venues being fully utilized by the public, or are there opportunities being missed to engage the public and provide Manitobans with the opportunity to partner with heritage venues?

4. What are the major barriers to heritage preservation? How can they be mitigated or eliminated?



## 8. Archives

### Profile

Archives are generally seen as repositories that house records used by communities to document their history. Archives are in fact much more than that. The Society of American Archivists describes the archival record as:

“records created or received by a person, family, or organization, public or private, in the conduct of their affairs and preserved because of the enduring value contained in the information they contain or as evidence of the functions and responsibilities of their creator, especially those materials maintained using the principles of provenance, original order, and collective control; permanent records.” (Society of American Archivists, 2016)

Archives are increasingly becoming places where hobbyists and members of the public go to research personal interests, such as family trees, local history, or events that occurred in particular years. Archives are unique and differ from libraries, because the material is irreplaceable. The records held in archives are unpublished and exist only in one original copy. If a record is stolen or destroyed, that record cannot be replaced and the evidentiary value of the lost record cannot be replicated or recreated.

Manitoba has an extremely strong and diverse archival community. Since 1974, with the deposit of the UNESCO-designated Hudson’s Bay Company Archives which were formally donated to the Government of Manitoba in 1994, Manitoba has become an acknowledged leader in Canadian archival practice and research.

Along with the Hudson’s Bay Company Archives, housed at the Archives of Manitoba, the province boasts the following world class institutions devoted to the preservation of Canada’s history through archives and archival research:

- **University of Manitoba Archives and Special Collections** – the records of the University of Manitoba, Canadian Prairie Literary Manuscripts, the Archives of the Agricultural Experience and rare books in the areas of western Canadiana, early Arctic exploration, early Native language syllabics, spiritualism, church history and philosophy, and agriculture among others.
- **The Centre du Patrimoine at the Soci t  Historique de St. Boniface** – the premier archival repository for the French-Canadian experience in Western Canada
- **The National research Centre for Truth and Reconciliation** – the permanent home for all statements, documents, and other materials gathered by the Truth and Reconciliation Commission on Indian Residential Schools
- **The Mennonite Heritage Centre** – housed at the Canadian Mennonite University, an inter-Mennonite facility that houses the records of the Mennonite Church of Canada
- **The United Church of Canada Archives** – for Manitoba and Northwest Ontario Conference
- **The Canadian Museum for Human Rights** – Canada’s first national museum

outside of the Ottawa area has a substantial archives and research component in addition to its exhibits gallery.

Manitoba has strong university archives offering institutional support for records management as well as significant research opportunities for students, as well as a large collection of personal records and a rare book collection. Manitoba's community archives ensure historical records of rural Manitoba are preserved and made available in the community that created them.

The Manitoban archival community is led by the Association for Manitoba Archives (AMA). Its mandate is to preserve the documentary legacy of the people and institutions of Manitoba by improving the administration, effectiveness and efficiency of the province's archival system. This is accomplished through promoting high standards, procedures and practices in the establishment and maintenance of archives; allocating resources, grants and services in order to fulfill the foregoing; and educating the public about the role and use of archives.

The Association for Manitoba Archives offers an accreditation program and currently has 33 accredited archives throughout the province. The Archives of Manitoba, which includes the Hudson's Bay Company Archives, is the largest archives in the province with a staff of 39. The smallest archives exist solely on volunteer labour. Most archives accredited by the AMA have staffing sizes under 5.

There are many other archives in Manitoba that are not accredited. These tend to be smaller volunteer run operations but are extremely valuable in preserving the history of Manitoba. Archives can also be found in libraries, museums, art galleries, and historical societies.

Because of its strong archival community, Manitoba is home to several research centres that benefit from being based in or close to the exceptional archival records found in Winnipeg. These include:

- The Centre for Rupert's Land Studies, based at the University of Winnipeg which facilitates scholarly research and publishing concerning the history of the Hudson's Bay Watershed
- Canada's History Society, publisher of the award winning magazine Canada's History (formerly The Beaver) also based at the University of Winnipeg
- The Master's in Archival Studies program at University of Manitoba offers a steady stream of students and new graduates which greatly aids in staffing and succession planning

Most archivists have professional graduate level training in Archival Studies. Graduate programs in Archival Studies are offered at the University of Manitoba, University of British Columbia, Laval University and the University of Toronto. Other archivists have a background in Library and Information Science while others, especially at small archives, have no formal training, are self-taught, or have received professional development training from the Association for Manitoba Archives.

## Social and Economic Benefits

As with Heritage resources generally, good data that helps us to understand the economic impact of archives is not available.

Archivists work to identify, preserve, and provide access to records that permanently record the culture of a society. These records are often the foundation for other cultural activities that provide:

- Stories that inspire the arts
- Research resources that fuel cultural industries, including film and television production, interactive digital media, the music industry, book and magazine publishing
- Primary sources for books
- Evidence that enables the recognition and designation of built heritage and cultural heritage landscapes
- Context for archaeological sites and museum artifacts

Archives provide evidence that such activities took place so future generations create cultural activities that are informed by what is happening in the present, and by what happened in the past.

Archives provide the basis upon which stories may be written and provide access to knowledge and information that informs our personal and community history. If archival records are not identified, preserved, and made accessible, other cultural activities lose their connection to the experiences specific to Manitoban society.

## Government Support

The Association of Manitoba Archives currently receives annual operational funding of \$28,400 from the Historical Resources branch of Sport, Culture and Heritage. This funding provides important though minimal operational support as it is not enough to hire full time staff or implement important and desired province-wide projects, such as a common strategy for the preservation of audio and sound records or a storage service for electronic records.

Conservators at the Archives of Manitoba consult and advise on preservation issues and are available for emergency consultation in

cases where archival records are threatened, damaged or destroyed.

From 1987 until 2012, like other provincial and territorial archival associations, the Association of Manitoba Archives received funding from Library & Archives Canada through the National Archival Development Program. This funding was significant and allowed the association to employ a full time executive director/archival advisor, administrative support, and a preservation consultant.

This funding greatly aided the development of the Manitoban archival community through access to trained advisors who could visit onsite archives free of cost and provide advice on proper archival practice. This funding, however, was cut by Libraries & Archives Canada in April 2012. No equivalent program has taken its place.

## Key Trends and Challenges

### *Digital Technology and Electronic Records*

Archives have struggled to balance their analogue traditions in a digital world. Many archivists have embraced digitization but still struggle with societal perception that everything should be available online. Online versions of all records is simply not possible due to the vast quantity of material housed in archives. Even well-funded and forward thinking archives like the University of Manitoba Archives & Special Collections are able to mount only a small percentage of records online.

## Long term preservation of electronic records is expensive and the potential for loss is extreme and immediate.

Some archives struggle with meeting their mandate regarding records management in an electronic format. While day to day work is now largely completed electronically, long term preservation of electronic records is expensive and the potential for loss is extreme and immediate. Solutions such as a Trusted Digital Repository (TDR) exist but are expensive and difficult to implement, particularly for institutions with limited human and financial capacities.

### *Diversity*

Canada has a long and storied archival tradition and Canadian archives and archivists are considered leaders by the international community. However, Canadian archives have not diversified at the same rate as Canadian society over the last 30 years.

The Canadian archival community is under-represented by people of immigrant and Indigenous backgrounds and the clients of archives tend to focus on interests such as genealogy, history, and evidentiary/legal documents. Ensuring the survival of a diverse archival record is a critical issue.

### *Preservation*

Climate controlled archival repositories are very expensive. With the exception of the largest archives in Manitoba such as those maintained by the province, universities, and a few others, archival records are held in sub-standard conditions. These conditions limit the archive

life span and often put records at risk from flooding and other threats.

The proper maintenance of electronic records requires resources such as servers, migration plans, and emergency back-up. Electronic infrastructure that ensures records are protected is prohibitively expensive for most, if not all, Manitoban archives.

## Indigenous Engagement and Impact

Canada's Indigenous communities use traditional archives to document and preserve historical interactions with Canadian society. Archives such as the Hudson's Bay Company Archive are often the only written record of a community and can be used as evidence in Land Claims and Treaty Rights cases with the Canadian government.

Researchers tend to be specialized and are often hired by a band's legal representative. The need for a community of trained Indigenous archivists has been identified by the Association of Canadian Archivists and educational institutions such as the University of Manitoba; however, growth of an Indigenous archivist class has been slow.

The Truth and Reconciliation Commission and the National Research Centre on Truth and Reconciliation have greatly raised the profile of archives and archival records among Canada's Indigenous population. As a result, interest in using traditional archival research and methods for Indigenous purposes is growing. This movement has been termed an effort to "decolonize the archives."

Manitoba archives are actively engaged with Indigenous communities and are utilizing non-traditional projects and methods to reach out to the Indigenous community. For example, the Archives of Manitoba and the federal ministry



of Indigenous and Northern Affairs Canada have formalized a Memorandum of Understanding that provides the ministry with access to St. Boniface Sanatorium records and the Sanatorium Board of Manitoba records in the custody of the Archives. These archives contain information relevant to Inuit people who were transferred to Manitoba for tuberculosis treatment.

This project is in response to individuals who were not informed of family member deaths, and do not know if and when their family members died or where they are buried. Indigenous and Northern Affairs Canada has established a Multi-Stakeholder Working Group on Inuit Graves, *Nanilavut* ("let's find them"), to support research into locating individuals who were sent away from their communities for treatment, to identify the location of gravesites, to create a database from all relevant sources, and to determine next steps and options for possible reconciliation.

The Hudson's Bay Company Archives' *Names and Knowledge Initiative* involves a partnership with various Indigenous groups and communities to bring archival photographs of Indigenous people back, both virtually and physically, to the community they were taken in the hopes of identifying individuals found in the

photograph. This project has been quite successful and has led to the identification of many Indigenous people. In several cases, people who previously had no photographs of deceased relatives have now been able to acquire copies.

### Questions About Archives

1. How can archivists in Manitoba best meet the challenges/expectations posed by the Internet age while still maintaining public access to the majority of their materials that are not digitized?
2. What can be done to ensure the survival of a diverse archival record that reflects ethno-cultural minorities, Indigenous peoples and others who are generally or historically under-represented?
3. Should the government look at developing, with the Association for Manitoba Archives, the Provincial Archives, universities and other interested partners, including the private sector, the creation of an Archival Hub for the province, where information can be exchanged, local archival documents retained, and the promotion of the Hub as the centre of expertise and a focal point for the province and the country?

## 9. Public Libraries

### Profile

The International Federation of Library Associations and Institutions and the United Nations Educational, Scientific and Cultural Organization state the purpose of the public library is to (Gill, 2001):

- Meet the educational, information and personal development needs of individuals and groups
- Provide resources and services in a variety of media

Public library boards are comprised of citizen representatives and local government council members. They are responsible for service delivery to their communities in accordance with The Public Libraries Act and its regulations. The Manitoba government supports library service delivery through grants, programs and initiatives.

There are 56 public library systems in Manitoba with 120 branch operations. This includes 31 independent municipal libraries, 21 regional libraries, and 4 pilot library services in partnership with Indigenous communities. Of these, 13 libraries serve designated bilingual communities and 9 are collocated in school facilities.

Public libraries are a service provided for all residents. A public library is created by, and an entity of, local authorities throughout Manitoba. The Public Libraries Act enables local authorities to establish library service

independently or in partnership with other local authorities to create a regional library service.

The provision of service is governed by The Public Libraries Act and The Public Libraries Allocation of Grants Regulation.

A Public Library Advisory Board (PLAB) is appointed by the Lieutenant Governor in Council to advise and make recommendations to the minister with respect to all matters that relate to The Act or arising out of the operation thereof.

Organizations which support and advocate for library service development include:

- **Canadian Federation of Library Associations** provides a voice for Canada's library communities, champions the value of libraries and collaborates with other organizations to strengthen the national library sector.
- **Provincial and Territorial Public Library Council** facilitates coordination of cross-jurisdictional initiatives and communicates with national library organizations and federal government agencies.
- **Manitoba Library Association** provides leadership in the development, support and promotion of library and information services for the benefit of its members, the library and information community and the people of Manitoba.
- **Manitoba Library Consortium Inc.** manages cooperative projects and

activities which provide Manitobans with equitable access to the province's library and information resources.

- **Manitoba Library Trustees Association** fosters effective library boards in Manitoba through leadership in communication, advocacy and trustee education.
- **Manitoba Association of Library Technicians** advances the role of library technicians and responds to sector-specific issues.
- **La F d ration des biblioth ques des municipalit s bilingues du Manitoba** promotes Franco-Manitoban language and cultural heritage through literacy initiatives and information sharing.
- **BC Libraries Cooperative** focuses on the delivery of shared operational infrastructure and resources to over 200 organizations and institutional members across Canada.
- **Spruce Libraries Cooperative** provides a shared library management system and administrative and technology support at cost for almost 40 percent of libraries in Manitoba.
- **Red River College (RRC)** – offers a two year library technician diploma.

## Social and Economic Benefits

In 2013, a study on the economic benefits of libraries found that for every dollar invested there was a \$5.63 return (Martin Prosperity Institute, 2013). Other economic impact studies have demonstrated that for every dollar invested in the provision of library service, the return value to the local economy is between \$2.50 and \$7.50 (SGS Economics and Planning

for the State Library of Victoria and Public Libraries Victoria Network, 2011).

Libraries provide safe, positive and inviting places for people to gather or pursue their interests and goals.

Libraries provide important social benefits. These community living rooms are often the only places for people to gather and pursue their interests and goals. Libraries bridge divisions and connect people to a wide range of social, cultural, economic, educational and recreational opportunities. They achieve this by offering dynamic environments to meet diverse interests and needs, by lending physical and digital collections and by providing reference services, public Internet access and programming for all ages.

Libraries provide safe, positive and inviting places for people to gather or pursue their interests and goals. They offer programs and spaces for recreation, cultural activities, learning and personal development through the lending of physical and digital collections including books, video, music, reference services, public Internet access, and programming for all ages.

Libraries provide both recreation and a gateway to our shared cultural capital and collective cultural experience. Public libraries are a focus for cultural, artistic and audience development in the community and help shape and support its cultural identity (SGS Economics and Planning for the State Library of Victoria and Public Libraries Victoria Network, 2011).

In many communities, the public library is the only public space where programs and services are developed and delivered to meet the needs and interests of the entire community. While the acquisition and provision of print and electronic library resources remain an important service function, modern services meaningfully impact community engagement and civic development priorities.

Libraries are engaged and deeply embedded in the local community. While most libraries can be described as true community spaces, some struggle to remain relevant to their community. Libraries are commonly considered to be a “third space”, distinct from the home and workplace it is a gathering place which “lend a public balance to the increased privatization of home life” (Oldenburg, 1996-97). Public libraries are important for civil society, democracy, and civic engagement.

Libraries provide safe, positive and inviting places for people to gather or pursue their interests and goals.

In urban locations, libraries are considered anchor institutions that make neighbourhoods safer and revitalize business sectors (St. Lifer, 2001). Their presence has been shown to revitalize neighbourhoods, particularly when the library is new or newly refurbished (Arts Council England, 2014).

“Libraries, traditionally collecting institutions that provide access to materials created by others, may now adopt new functions, providing communities with opportunities to create or co-create content for an individual’s

own use, for use by the community, or for inclusion in the library collection” (Library of the Future, 2016).

### *Impact on Related Sectors*

Libraries are integral parts to the cultural, artistic, recreational and educational activities of their communities. The library sector connects to and interacts with all of these sectors. Library programs support and inspire generations of creators and audiences.

### *Manitoba Publishing*

Manitoba publishers and authors are represented at provincial library conferences and have built strong relationships with the library sector. Local titles are featured on library shelves and in online collections (eLibraries Manitoba (eLM) - OverDrive, 2016). Through author events and programs, libraries provide writers with valuable opportunities to develop their brands and increase their sales. Some writers’ groups routinely use library facilities for ongoing program and development purposes (The Writers' Collective of Manitoba, 2016).

Manitoba libraries participate in provincial and national literacy and literature initiatives that celebrate local and provincial authors. Through partnerships, Manitobans have access to a popular Writer-in-Residence program available to writers at all levels province-wide; libraries also develop local programming in this regard.

### *Visual Arts & Music*

Visual artists find ready audiences and willing venues at public libraries in Manitoba. Libraries display local and touring provincial and national art exhibits. Local and professional performance events are held regularly in public libraries and are featured in program communications. Libraries are closely connected to local arts councils and organizations and routinely promote and support art and music festivals.

Notably, libraries may be the first or only opportunity for many in the community to showcase or experience art and culture.

### Archives

Public libraries have a strong relationship with archives. Libraries connect people to their heritage, often a first point of contact with those seeking genealogical or local and local historical records. Libraries regularly support researchers in discovering records online as well as archived.

### Education

Public libraries contribute significantly toward supporting educational institutions and student success. Libraries operate summer reading programs, after-school homework groups, tutoring programs and programs tailored to home-schooling. Successful joint-public/school library facilities also exist. Libraries support adult learning in partnership with education centres and provide space, support and technology for distance education, Libraries proctor exams. And provide interlibrary loans between public and post-secondary library institutions.

Public libraries contribute a significant effort toward supporting educational institutions and student success.

Many libraries excel at delivering preschool services. Early literacy story time is a staple of public library service. Libraries are encouraged to provide services that support literacy and learning through reading, writing, singing, and playing.

Most libraries deliver a summer reading program, that is either designed in-house or built on the framework of the TD Summer Reading Club (TDSRC). Targeted at pre-schoolers to pre-teens, TDSRC Club is a national program that provides materials, booklists, and programming aids in a bilingual format. It has also established best practices for promotion in the community.

### Tourism

Libraries are frequented by tourists in search of general advice, Internet access and information about local events, history and goods and services.

## Government Support

### Administration of Provincial Grants

While local tax levies constitute the primary funding envelope for public libraries, the department of Sport, Culture and Heritage administers approximately \$5.8 million in regulated grant funding through the Public Library Services Branch as well as \$423,000 in targeted grants to public libraries. Grants include:

- **Library Service Establishment** A one-time grant of \$10,000 to support initial service development.
- **Annual Operating Grant** An annual grant equal to local funding up to a maximum of \$8.50 per capita.
- **Collection Development** An annual grant of \$5,500 for each service point to support collection development. Libraries located in designated bilingual service areas or that are north of the 53<sup>rd</sup> parallel receive an additional \$1,000.
- **Library Technology Sustainability** A weighted-share of \$375,000 to aid in maintaining a modern technology



infrastructure. Winnipeg Public Library receives a flat grant of \$100,000.

- ***Library Cooperative Technology*** (Building Manitoba Fund) A one-time project grant to support cooperative projects between library systems. Up to \$48,000 may be awarded in each year.

The Public Library Services branch provides consultation services, administers provincial grants, develops standards and guidelines, and provides training and support to library boards, administrators, and staff.

The Department of Indigenous and Municipal Relations has traditionally provided funding and planning assistance for facility upgrade, expansion or acquisition projects through the Community Places program. Eligible projects are those which provide sustainable recreation and wellness benefits to communities (Government of Manitoba, 2016).

### *Key Programs and Initiatives*

The Public Library Services branch goals are designed to support library services and strengthen the network of community-based public library systems in Manitoba. The branch acts to:

- Maintain standards and guidelines to support local development efforts
- Work with communities and library boards to develop, enhance and extend local service delivery
- Monitor and advise on organizational, administrative and professional development
- Conduct research to support service and program development
- Engage with library boards to provide advice and assist in evaluating services
- Collect and publish key performance indicators for all public library systems in Manitoba
- Conduct user satisfaction surveys to help develop community need assessments and define local program and operational objectives
- Develop and provide regular training sessions for library staff and trustees
- Communicate learning opportunities available in Manitoba and online
- Support the efforts of the local library associations with the development and delivery of conferences and initiatives
- Develop resource-sharing systems
- Coordinate shared-acquisition strategies for electronic resources
- Support the development of Open Shelf and Travelling Library service agreements
- Collaborate with national and provincial agencies to coordinate and support library initiatives that raise public awareness of library services
- Provide public library leadership by representing Manitoba's library policy interests provincially, nationally, and across all sectors
- Promote classification specifications for library staff at every level
- Maintain position description templates
- Support library boards with their competition processes and performance evaluations
- Participate on the Red River College Library and Information Technology Advisory Committee to support the development of the library technician program

- Provide administrative support to coordinate the Public Library Advisory Board (PLAB) meetings and develop board policy.

## Key Trends and Challenges

### *Rising Costs*

To a large extent, local funding determines the quality and availability of services. Local authorities decide how much funding their library systems receive. In order to qualify for provincial grants, local authorities must provide a minimum of \$3.75 per capita.

Economic trends impacting public libraries include:

- Multinational publishing houses and American distribution chains control pricing schemes for physical and electronic book markets
- Library purchasing power fluctuates with the relative value of the Canadian dollar
- There is a trend toward digital marketplace participation
- Insufficient, stagnant or decreasing investments have a dramatic and cascading consequence for public services locally and province-wide
- The majority of staff responsible for library operations do not have professional or paraprofessional library training (Counting Opinions (SQUIRE) Ltd., 2016). Cost has been cited as a major barrier (Simpson, 2013).

Maintaining service levels requires responsive investment. Local investment may not increase with inflation, leaving local library boards to balance budgets with adjustments to hours of operation, service and program levels, collection development and staff wages.

### *Rural Access*

The distribution of Manitoba's population poses unique service challenges for the province's public library sector. The State of Rural Canada 2015 Report, details the multiple and serious challenges facing rural regions. Rural Canada faces a mix of demographic, economic and social challenges including:

- Depopulation
- Lack of access to health care and education
- Lack of development opportunities
- Aging infrastructure

This report finds that rural places are economically innovative with a strong sense of community despite limited resources. The report recommends that various levels of government develop new vision and policy frameworks for rural Canada. (Stevenson, 2015).

Despite progressive policy efforts over time, approximately 150,000 Manitoba residents remain without access to library service today; including 69 First Nation communities, 49 Northern Affairs communities, and 40 rural municipalities. The remoteness of many communities presents challenges to the development of library services. High speed Internet is often unavailable, low populations affect local funding capacity and some communities are only accessible by winter roads or by aircraft.

Approximately 150,000  
Manitoba residents  
remain without access  
to library service today.

Library standards and guidelines promote facility specifications for optimal community use. Manitoba public library statistics suggest that many rural libraries do not meet the recommended standard for minimum space requirements based on population and collection sizes (Government of Manitoba; Facility Statistics).

“High quality distance learning options respond to the different needs of students, schools, and school divisions in order to support flexibility and increased educational opportunities for learners in Manitoba, regardless of geographic location” (Government of Manitoba, 2016). For many social, economic, and technological reasons listed above, public libraries are an ideal space - and potentially the only space - to access distance learning opportunities.

### *Demographic Trends*

Service area demographics influence the range and types of services offered. Public libraries tailor their service to the diverse needs of their communities taking into account the resources available to them. Considerations include hours of operation, kinds of programs offered, collection development priorities, technological offerings, training needs and cultural and linguistic relevance.

### *Bilingual Community*

French is the first language of more than 42,000 Manitobans. Bilingual communities face unique challenges with respect to maintaining their language and culture. Even where French-language materials and services are available, they are typically more expensive. Bilingual libraries rely heavily on interlibrary loans to meet the needs of their users. Other Canadian jurisdictions are in a similar situation and collaboration may provide an opportunity to address these issues.

### *Newcomer Populations*

Approximately 2,000 immigrants settle in rural Manitoba each year. Libraries offer many services which are extremely valuable to new Manitobans. These services include Internet and information literacy support, language-learning support and materials in world languages. (Manitoba Labour and Immigration, 2015).

Given the diversity and varying demographics of each community in Manitoba, there is a growing awareness among library boards of the differing needs of community members. Local funding must be sufficient to provide service to all members of the community. Hours of operation, collection priorities, public access computers, and space use can be adapted.

### *Collaboration*

Public libraries are more successful when they work together. Cooperation and collaboration are core library values.

Reciprocal borrowing agreements are common, where members of one library can borrow directly from another library. Interlibrary loans exchange materials by discounted mail rates between library systems. There are over 35,000 interlibrary loan transactions between public libraries each year.

Some libraries leverage partnerships to achieve higher quality service and efficiency. Regional libraries demonstrate a commitment between local authorities. The Royal Society of Canada suggests that provincial and territorial ministries should encourage and support public library systems in forming larger unites with adequate technological services.

### *Technological Trends*

#### *Digital Books*

Publishers and distributors give discounts to libraries when they purchase physical copies of

books, but charge premiums when they purchase digital copies. Bricks and mortar bookstores are closing (SGS Economics and Planning for the State Library of Victoria and Public Libraries Victoria Network, 2011), and much of that market being overtaken by companies like Amazon. These companies offer new and used books as well as eBooks for sale online 24/7. For those who can afford it, the convenience of online purchasing may decrease visits to the library. This practice, however, disregards the substantial advantages of library's physical and digital collections. (Fowler, 2014).

Technological tools for creation and dissemination of creative works have enabled the rapid rise of the born-digital self-publishing industry. Self-published authors can earn a living through this alone, selling directly to customers or through aggregators such as Amazon (Henn, 2014). The flood of self-published works without publishers' involvement can make it difficult for libraries to identify quality resources. This may become self-correcting in the longer term as reputation marketplaces develop.

### *Integrated Library Systems*

Public libraries in Manitoba use a variety of integrated library systems, from small single-branch operations to large multi-branch operations to very large consortia operations. All systems have different capabilities. This is especially true in terms of standards and best practices in the areas of user authentication for online resources, resource discovery between multiple library branches/systems/databases and available application programming interfaces to enhance user experiences.

Other jurisdictions have implemented province-wide systems. As libraries unite around a small number of integrated library systems, with

certain technological capabilities, the idea of a single Manitoba library card becomes increasingly feasible. (Mlinarevic, 2013).

### *Technology Resources*

Most libraries replace or update their public computers on a cycle of every 3 to 5 years. The province supports the technology infrastructure of public libraries through the program grants. While multi-year technology plans are highly encouraged, many public libraries make decisions based on local annual budgets.

Most libraries do not have information technology (IT) personnel on staff have varying levels of skill with new technology. Often, libraries rely heavily on commercial support for both routine and complex IT needs.

### *Access to Internet*

Many public library services are critically dependent on high-speed Internet access. Services such as downloading eBooks, streaming audio and video, accessing the Internet, searching the catalogue and using databases depend on adequate bandwidth and stable connections.

High-speed Internet is reaching many Manitoba communities, but not all (Government of Manitoba, 2016) (Canadian Radio-Television and Telecommunications Commission, 2013). Fifteen percent of Manitoba households do not have the options of high speed Internet. Where high speed Internet is available, costs and speeds vary. Moreover, the very definition of high speed changes over time. In areas where broadband is expensive, the public library is one of the few places where it may be available for many community members. (Digital Inclusion Survey, 2016). This increases the relevance of services such as public Wi-Fi.

## Many public library services are critically dependent on high-speed Internet access.

With respect to broadband, much of rural Manitoba is underserved. Manitoba's data speeds rank among the lowest in Canada (Kelly & Ashton, 2013). The demand for new services increases faster than ongoing bandwidth improvements (Demers, et al., 2014). To increase the impact of broadband on the community, Alemanne et. al. propose a leadership role for rural public libraries as a linchpin among broadband anchor institutions in the community (Alemanne, Mandel, & Clure, 2011).

There may be opportunities to connect public libraries to the Manitoba Research Network (MRNet) and/or the Manitoba Hydro Telecom (MHT) network for high-speed Internet access (MRnet - Manitoba Research Network, 2016) (Manitoba Hydro, 2016). Connecting libraries to stable and competitive networks can ensure that all Manitobans have equitable Internet access, regardless of their socioeconomic status or location.

### *Digital Presence*

The public expects online services to be available 24 hours a day. These services include the capability to download eBooks or magazines, search the library catalogue, discover and requesting titles from any library in the province, review available library programs and accessing library contact information.

Social media fosters a dynamic and bi-directional relationship between the library and its community. A library without a digital

presence risks becoming irrelevant. (BiblioCommons, 2015). The Internet usage gap between older and younger Canadians is closing (Allen, 2013) and public libraries can help seniors through targeted programming. While it seems unlikely that printed books will disappear entirely, eBooks and eAudio books have expanded traditional publishing's offerings. In 2014, 17% of trade book sold in Canada were electronic. (Smith, 2014) eBook sales are almost the same as hardcover sales. (Booknet Canada Staff, 2015). eBook readers and smart phones enable users to access current reading material from anywhere. Many Manitoba publications are not available in digital formats for public libraries to purchase. Such as, they are not discoverable or accessible through digital collections or search tools.

## Many Manitoba publications are not available in digital formats for public libraries to purchase.

### *Enabling Creative Collaboration*

Libraries are in a unique position as a public space which can offer the use of quality equipment and resources to creative collaborators. Writers, musicians, film-makers, researchers, teachers and students all have an unprecedented ability to collaborate with colleagues across town or around the world. Remix culture, open-source software development, and Wikipedia are real-world examples of the digital collaboration trends.

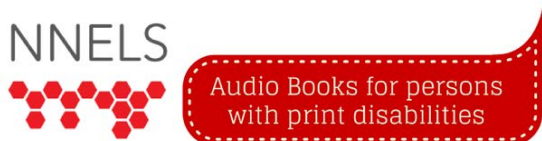
Some libraries have initiated Internet-based programming to remove remoteness or travel barriers one such example involves authors visiting the library via Skype to provide author readings and discussions.



### Accessibility

Universal access is an important value of the Canadian library community. The Accessibility for Manitobans Act and its regulations significantly impact library service by building a framework for the removal of barriers to library access.

The Public Library Services Branch has published and distributed a Universal Access toolkit for libraries to support accessibility at every library. To facilitate compliance with The Act and regulation, Manitoba and other provincial and territorial jurisdictions developed the National Network for Equitable Library Service (NNELS). NNELS is a digital repository of library materials in alternate format, which helps to ensure that every user can access resources from any public library in Manitoba.



The Federal government signed the Marrakesh Treaty in June 2016. (WIPO, 2016) The Treaty and the corresponding changes to the Copyright Act will see easier access to international alternative format books and increase access to content in world languages.

Libraries benefit from being located in facilities that offer a variety of services and generate foot traffic. As communities develop multi-use recreational facilities, public libraries may be viable occupants.

Joint-use public/school libraries may be successful in small communities. Separate public entrances, designated parking spaces and a clear understanding of the roles of each type of library through a joint-use agreement are

critical components for success. To effectively serve the public, it is essential to deliver programs that appeal to local populations and to publicize service offerings.

(McNicol, 2006).

### Global Trade Agreements

The Canadian Federation of Library Associations, Canadian Association of Research Libraries, and the Canadian Urban Libraries Council expect that parts of the proposed Trans-Pacific Partnership could have significant impacts on the ways that knowledge is shared and culture is preserved in Canada. A concerning example is the mandatory extension of the term of copyright protection. This would affect digitization efforts that depend on the ongoing release of material into the public domain. The requirement of a fixed interpretation of digital locks would create barriers to access copyright works for people with perceptual disabilities and for libraries to access copyrighted works for acceptable uses (Canadian Library Association, 2016).

### Indigenous Engagement and Impact

Public Library development and regional library partnerships have had limited impact on Indigenous communities. The Act and its regulations are based on municipal governance models and do not effectively reflect governance structures of Indigenous communities.

Indigenous communities in Manitoba have developed two approaches to pilot library services:

- 1) In partnership with the University College of the North (UCN), The joint public/academic/school library services

have been established in Norway House Cree Nation, Chemawawin Cree Nation (Easterville) and Mathias Colomb Cree Nation (Pukatawagan). UCN provides all the benefits of a federated library service model that supports Indigenous autonomy by ensuring communities have a local staff and board that can direct service needs.

- 2) The Peguis School Board provides operational funding to the Peguis First Nation Library. In addition to the collection, the library offers Internet services, Ojibway language classes, and appliqu  sewing classes.

Public library service development in Indigenous communities throughout Manitoba is still in their early stages. This provides communities with ample opportunity to explore unique library services to their unique cultural and linguistic needs.

### Increasing Urban Population

Indigenous people are represented in all Manitoba communities. Public libraries whose service areas include or border Indigenous communities can develop relevant collections, programs and services reflective of local Indigenous languages and cultures.

As of 2008, "... 53 per cent of Aboriginal people lived in cities" (Statistics Canada, 2015). This shift from remote reserve to urban living has created opportunities for libraries to respond to the needs of Indigenous readers and future readers with targeted programming and collections. Except for the Winnipeg Public Library, there is little information on the response of public libraries to the needs of this community (City of Winnipeg, 2016).

### Remote Communities

The remoteness of many Indigenous communities presents challenges to building library services. High-speed Internet is often unavailable. Community populations can be low, which affects potential local funding capacity. The potential for resource sharing is adversely affected by distances between communities and if winter access is limited to winter roads or fly in.

A recently published article entitled *Serving remote communities together: a Canadian joint use library study* focuses on how library partnerships and joint-use agreements in Manitoba are serving remote communities (Sarjeant-Jenkins & Walker, 2015). The researchers examined the partnerships with two First Nation communities in Manitoba and the University College of the North.

Key findings detail the challenges and successes of joint-use library partnerships in remote communities. The early evidence supports further innovative partnerships in Manitoba, across Canada, and in other countries throughout the world. The pilot projects operating in Manitoba are demonstrating success and this study details early, yet profound, outcomes in the communities served.

The study clearly articulates the value and impact of library service in communities where service was previously undeveloped and reinforces the value and impact proposition to communities regardless of geographic, economic or cultural factors.

### Questions About Libraries

1. What can be done to maximize the role and contribution of libraries to the well-being of all Manitobans?
2. How should the cultural policy address the challenges currently impacting the public library system?



3. How can libraries play a role in celebrating and promoting culture in your community?

## Part C – Industry-Wide Topics

## 10. Indigenous Culture

### Profile

Indigenous peoples in Manitoba represent a number of distinct identities, cultures, languages and traditions, including Cree, Ojibway, Oji-Cree, Dakota, Dene, Inuit and M  tis. As noted in the Declaration of Kinship and Cooperation among the Indigenous Peoples and Nations of North America, Indigenous peoples are also guided by many common purposes and beliefs, shaped by many common experiences:

*“We have all retained the inherent right to self-determination. In shaping our own destinies we will remain faithful to the time honored traditions of our ancestors and we will work to secure the greatest possible freedom, dignity and prosperity for our descendants;*

*We have all known ourselves as people who live in harmony with our environment and cherish and protect our traditional homelands;*

*We have all shared a belief that individuals and peoples must address each other in a spirit of respect and tolerance;*

*We have all experienced outside encroachment upon our traditional homelands and we have striven to co-exist with other peoples and cultures in peace” (AFN, 1999).*

Language is evolving. “Aboriginal peoples” has been used as a collective name for the original peoples of North America and their descendants. The Canadian Constitution recognizes Aboriginal peoples as including First Nations, Inuit and M  tis. In recent years many

groups have rejected this terminology in favour of “First Nations”, “Inuit” or “M  tis”.

“Indigenous” has been used more frequently by organizations that represent or serve all groups. Where this paper refers to a particular source document, the terminology of the source has been maintained, otherwise Indigenous is used.

Western arts and culture are often viewed as a distinct component or reflection of society. Indigenous arts and culture can be found more fully intertwined, informing how Indigenous people see the world and interact with others. Ceremonies, such as sweat lodges, smudging, prayer, sun dances, memorial feasts, and round dances are an important connection to cultural traditions and are often part of Indigenous gatherings. “Ceremony is about community; ceremony is a way to acknowledge the interconnectedness of everything; ceremony is how values and beliefs are taught and reinforced.” (McCue, 2016)



*The traditional way of education was by example and experience*

*And by story telling.*

*The first principle involved was total respect and acceptance of the one to be taught*

*And that learning was a continuous process from birth to death.*

*It was a total continuity without interruption.*

*Its nature was like a fountain that gives many colours and flavours of water*

*And whoever chose could drink as much or as little as they wanted to and whenever they wished.*

From "Songs of Our People: Teachings on the Natural Way", by Elder Art Soloman (Kirkness, 2008)

While many Indigenous words, inventions and games have become part of common Canadian language and use, many elements of Indigenous culture remain distinct and unique representations of Indigenous traditions and perspectives. Expressions of Indigenous culture include language, visual art, music, dance, ceremony, storytelling and traditional knowledge. While stories may entertain, the oral tradition was long a primary means of sharing experience, education, and maintaining the history and traditions of Indigenous people.

Indigenous culture is also very much alive and celebrated in more contemporary formats. Manitoba artists landed fourteen Indigenous music award nominations at the Aboriginal People's Choice Music Awards in 2015.

At 16.7% of the total population, Manitoba continues to have the highest percentage of Indigenous people among Canada's provinces, four times the Canadian average of 4.3%. Respondents to the National Household Survey who identified themselves as registered First Nations were in the largest group, followed by M tis at 6.7% of the Manitoba population. About 58% of First Nations people with registered status reported living on reserve in 2011 (Statistics Canada, 2011). In the City of Winnipeg, the M tis population is approximately 46,000 and registered First Nations approximately 26,000. Manitoba has the largest urban First Nations and M tis populations in Canada. One in seven Aboriginal Canadians lives in Manitoba.

### *Indigenous Political Structures*

Political structures of Indigenous peoples in Manitoba include the following organizations:

**Assembly of Manitoba Chiefs (AMC)** The mandate of AMC, through the Chiefs-in-Assembly, is to devise collective and common political strategies and act as an advocate on issues that commonly affect all 64 of the First Nations of Manitoba. AMC works closely with the Assembly of First Nations which collectively represents the political interests of First Nations across Canada.

**Southern Chiefs Organization (SCO)** A political organization established to protect, preserve, promote and enhance First Nations peoples' inherent rights, languages, customs and traditions. SCO represents 32 member First Nations in the southern Manitoba.

**Manitoba Keewatinowi Okimakanak (MKO)** Established to represent and advocate for the common interests of the 32 member First Nations in northern Manitoba.



**Tribal Councils** There are seven First Nation Tribal Councils in Manitoba. Like the Chiefs' organizations, Tribal Councils will also advocate for the common interests of their member First Nations, which are typically within a geographic region. Eight Manitoba First Nations are not affiliated with a Tribal Council. Tribal Councils may also provide additional technical capabilities, economic development, land or social services to member communities that would be difficult for an individual community to provide on its own. For example, this may include support for financial management, economic development, housing, education, child and family services, policing, etc.

**First Nations** Individual First Nations communities are represented by an elected Chief and Council, and are responsible for: representing community members as the governing authority; development of policies and bylaws; administration of community resources; and distribution of federal funds for this purpose.

**Manitoba Inuit Association** Promotes Inuit values, community and culture and provides services to the Inuit in Manitoba.

**Manitoba M tis Federation, Inc.** The MMF promotes the political, social, cultural, and economic interests and rights of the Metis in Manitoba.

### *Indigenous Cultural Organizations*

There are many not-for-profit organizations in the Indigenous community that work to incorporate or reflect Indigenous culture in delivery of various programs. There is a smaller number of organizations dedicated specifically to cultural programs.

**The Manitoba Indigenous Cultural Education Centre Inc.** (MICEC) is a provincial non-profit educational organization that promotes

awareness and understanding of Indigenous cultures to all interested people (MICEC, 2016). Programs and services are available to all ages through the Community Connection Program, the People's Library, and the Heritage Collection.

The MICEC receives funding under the Cultural Education Centre Program and is part of the First Nations Confederacy of Cultural Education Centres.

**Aboriginal Curatorial Collective** The Aboriginal Curatorial Collective is a not-for-profit organization dedicated to informing the public about the role of Aboriginal art curators in protecting, fostering, and extending Aboriginal arts and culture in North America and around the world through acquisition, conservation, interpretation and exhibition (ACI Manitoba, 2016).

**The Aboriginal Council of Winnipeg** An organization that addresses the needs of the Aboriginal community in Winnipeg, including all aspects of living in an urban environment.

**Indian and M tis Friendship Centres** Indian and M tis Friendship Centres are non-profit community centres created to provide services to urban Aboriginal people (First Nation, M tis, and Inuit). The IMFC goal is to provide assistance to Aboriginal people adjusting to living in an urban environment, while helping them to maintain their culture. Several Friendship Centres are found in communities throughout Manitoba.

**The Circle of Life Thunderbird House** The Circle of Life Thunderbird House is a cultural space for Aboriginal people to meet and engage in cultural activities. The Thunderbird House provides the public with access to Aboriginal elders, urban sweat lodge ceremonies, cultural ceremonies, and drumming nights. The space is



available to rent for conferences and meetings. Thunderbird House can also deliver cultural awareness workshops, elder services and various cultural programming activities.

### ***Aboriginal Languages of Manitoba***

**Inc.** Aboriginal Languages of Manitoba Inc. (ALM) formerly known as The Manitoba Association of Native Languages, Inc. (MANL) was incorporated in 1985 to promote the retention of Manitoba's Aboriginal Languages. The Native Education Concerns Group, which formed in 1978 addressed the issue of the need for Aboriginal language preservation. The Association was established in response to this need (ACI Manitoba, 2016).

## Government Support and Programs

Government support and programs offered by the Province of Manitoba for Indigenous culture have been included in the preceding sections on each sector of the cultural and creative industries.

The Government of Canada maintains an Aboriginal Art Centre that includes a gallery in Gatineau, Quebec, a lending program, resource library, online art gallery, artist directory, and art acquisition program. It also provides a range of funding programs and grants, including the following (Government of Canada, 2016):

***Aboriginal Peoples' Program*** Works with Aboriginal Peoples, primarily off-reserve, to celebrate and strengthen their cultural distinctiveness as an integral part of Canadian society

***First Nation and Inuit Cultural Education Centres Program*** Funds approximately 100 First Nation and 8-10 Inuit centres to help preserve and strengthen their unique cultures, traditions and languages

***Aboriginal Languages Initiative*** Supports community-based projects that contribute to the preservation and revitalization of Aboriginal languages

***Northern Aboriginal Broadcasting*** Supports production and distribution of Aboriginal audio and video content.

## Key Trends and Issues

### ***Inherent Right of Self-Determination***

Globally, concerns of Indigenous peoples have received significant attention in the past decade. The United Nations Declaration on the Rights of Indigenous People in 2007 recognized the urgent need to respect and promote the inherent rights of Indigenous peoples which derive from their political, economic and social structures, and from their cultures, spiritual traditions, histories and philosophies.

The Declaration further expresses the conviction that control by Indigenous peoples over developments affecting them will enable them to maintain and strengthen their institutions, cultures and traditions, and to promote their development in accordance with their aspirations and needs (United Nations, 2008).

Support for Indigenous culture has often been part of general programs designed and delivered by government or partner Arts Councils, perhaps with additional assistance to remove barriers, or to otherwise ensure equitable access to programs. Insight for future public policy may be drawn from the Declaration in terms of the role of Indigenous people in determining the focus, design and delivery of programs for Indigenous culture.

### ***Reconciliation and Restoration***

*“Colonization robbed First Nations of their cultural inheritance. The death of thousands*

*of people through introduced diseases meant that their vast knowledge could not be passed on to the survivors. The right of parents to pass on what they knew of their culture to their children was blocked by oppressive residential schools. After two and three generations of the residential schools, traditional language and culture was displaced by a poorly taught foreign language and alternative lifestyle” (Mussell, 2008)*

The Canadian Truth and Reconciliation Commission (TRC) put forward a number of recommendations that have relevance to the historic record, information, and programs in cultural institutions such as libraries, archives, and heritage resources. These recommendations include ensuring the truth of our history of residential schools is accessible to the public, and that more public education be made available.

A people without history is  
like wind on the buffalo  
grass.

- Sioux Proverb

The commission called for a review of federal and provincial archival policies to ensure they are consistent with the United Nations Declaration on the Rights of Indigenous Peoples. It recommended that strategies and procedures be undertaken, led by the Indigenous community for the ongoing identification, documentation, commemoration and protection of residential school cemeteries and other sites at which residential school children were buried, including appropriate memorial ceremonies and commemorative markers to honour the deceased children.

Beyond the recommendations of the TRC, more and more Indigenous leaders and workers are calling for healing, family restoration and strengthened communities of care. These leaders and workers promote a renewal of cultural practices and teaching history from an Indigenous perspective. They call for education and training that combines the best of mainstream and Indigenous knowledge (Mussell, 2008).

My people will sleep for one  
hundred years, but when they  
awake, it will be the artists  
who give them their spirit  
back.

- Louis Riel, July 4, 1885 (MMF)



### Oral Traditions and Archival Capacity

The historic record of Indigenous peoples was primarily preserved and communicated through though an oral tradition. The extent to which this tradition was shared has diminished as discussed earlier, and much of this history is at risk as elders pass away. Much of what is preserved in written or visual form has been maintained by non-Indigenous archives. There are very few professionally trained Indigenous archivists, and little understanding of what a

new Indigenous archival tradition might be. Many communities do not have the resources to expend on developing historical archives (whatever they may be or how they may be structured), records management, or even a formalized attempt to document their history.

### *Traditional Knowledge and Land Development*

Political issues related to treaty land entitlement, traditional land use, and resource development continue to challenge relationships between governments, Indigenous people and developers.

The preservation of Indigenous heritage is at risk as more lands are developed to access natural resources, for commercial or other purposes, and as Indigenous people and communities relocate. Although archaeological consultants hired by developers or communities may have some understanding of Traditional Knowledge, this is no substitute for coordinated policy development and direct participation with Indigenous communities in developing protocols. In light of the Truth and Reconciliation report, it is important that current processes are re-examined considering the principle of partnership with Indigenous communities, and that policy on community relations and care of archaeological resources is not inadvertently made by default through case-by-case development reviews or lobbying on a particular project.

### *Indigenous Culture in Urban Environments*

Over 100,000 Indigenous people live in Winnipeg and other urban communities in Manitoba (Brandon, Portage la Prairie,

Thompson, The Pas). Unlike living on reserve or in more distinct Indigenous communities, it can be more challenging to establish and maintain connections with Indigenous culture, to learn, keep culture alive, enable intergenerational transference, and participate in cultural activities.

### *Questions About Indigenous Culture*

1. How can the cultural policy help reflect the Government of Manitoba's response to the Truth and Reconciliation Commission's Calls to Action? How can cultural policy and cultural activities help facilitate Reconciliation? What is the role of Indigenous cultural development in the Cultural Policy?
2. What can be done to foster the development and growth of Indigenous artists, arts organizations and cultural entrepreneurs?
3. What can be done to foster equitable access for Indigenous people and their communities to community arts activities and arts education?
4. Which government ministries and agencies should play a larger role in cultural development in order to foster a whole of government approach to Indigenous cultural development?

## 11. Cultural Infrastructure

### Profile

Cultural infrastructure refers to physical assets, specifically the buildings and spaces, necessary to support the full spectrum of cultural sector activities. These activities include but are not limited to:

- The creation and production of art and cultural products
- The study or storage, preservation, and exhibition of art, artifacts or historic buildings
- Rehearsals and performances
- Provision of library services
- Education and training

Front-facing spaces are important for display, exhibition, performance, admissions, ticket sales, reception and amenities. Inward-facing ones provide offices, meeting rooms, training facilities and, most importantly, the domain specific spaces that enable the work of interpretation, preservation, research, storage, art-making, set-building, costume-creation, etc. to take place.

For the purposes of this discussion, cultural infrastructure does not include organizational capacity or structure. Neither does it include ancillary infrastructure which may rely heavily upon cultural products for their marketability, and are necessary for the use, enjoyment (and sometimes creation) of cultural products. Examples of such ancillary infrastructure include: components required for Internet connectivity (transmission towers, satellites, fibre-optic cable, etc.); cinemas; commercial galleries; spaces required for the making,

repairing or selling of musical instruments; artists' materials; archival materials; frames and framers' materials, etc.

The building of cultural infrastructure has accompanied the maturation of our province as a whole and the historical development of our communities large and small. These physical spaces are important to Manitobans because the cultural activity they house cannot exist without them. Together these spaces and the activities they support enhance our individual and community well-being, and boost our attractiveness to visitors, residents and business. To that end, the province has historically contributed to the creation of both primary infrastructure, specifically intended for cultural activities, and secondary infrastructure which many communities may then call in to service to meet their growing demands for cultural programming.



**Primary spaces** such as galleries, museums or theatres have, as their main function, the support of cultural or creative industry activities. Primary cultural spaces may be purpose-built, multi-purpose, or adapted for re-use.

**Secondary spaces** provide access to cultural activities as ancillary to their primary function



as a school, recreation centre, arena, place of worship, convention centre, or community centre. Secondary spaces are multi-purpose by definition and while not designed with cultural activity as a major priority, they often fill a critical gap.

Manitoba must have both types of spaces in order to meet all of its goals for culture, from well-being to economic development to fostering excellence.

### *Purpose-Built Facility*

A purpose-built facility is constructed to serve one particular cultural activity at its highest level of performance. It has very specific features, materials, or specifications intended to enhance the quality or success of the activity taking place in the space, supporting excellence in that field:

- Purpose-built recital or concert halls designed to produce optimal acoustics – achieving precise measures of reverberation, decay, absorption, diffusion, etc.
- Climate controlled display or storage space – maintaining precise levels of humidity, temperature, air quality, etc.

Their degree of specialization, technical design requirements, high costs and possibly their limited uses, make purpose-built primary spaces the smallest portion of our inventory, which are usually located in major urban centres. Examples include The Manitoba Museum, Winnipeg Art Gallery, University of Manitoba’s Eva Clare Hall, the Hudson Bay Archives, or the Royal Manitoba Theatre Centre.

### *Multi-Purpose Facility*

A multi-purpose facility is intended to accommodate a variety of different cultural

activities or mediums. Its design features are less specialized, allowing it to house as wide a range of cultural activities as possible.

Thoughtfully designed multi-purpose cultural spaces, although they must compromise on very specialized enhancements, still incorporate many special features and thereby provide a range of high quality experiences and maximum value to its community: auditoriums, community halls, and outdoor stages.

The majority of Manitoba’s inventory would fall into this category. Examples include the Centennial Concert Hall, the Western Manitoba Centennial Auditorium, or the Manitou Opera House.

### *Adapted for Re-Use*

Spaces that have been adapted for re-use are those that no longer serve their original purpose and have been reclaimed, adapted, retrofitted or renovated to support one or more cultural activities:

- A school that closed its doors
- A vacated church
- A decommissioned movie theatre



Examples exist throughout the province including: the Golden Prairie Arts Council, previously a CN train station; or the Viscount Cultural Centre, previously a church.

Manitobans have frequently used this approach to create new purpose for designated historic buildings like the Antler River Historical Society Museum which occupies what was once the Melita School built in 1893; Le mus e de saint-boniface, previously the Grey Nuns Convent completed in 1851; or the St. Norbert Arts Centre located in the Trappist Monastery Ruins and Guesthouse historic site.

### *Ownership or Residency*

A final critical distinction within the cultural infrastructure domain is that of ownership or residency. Facilities may be owned and managed by the private or public sector for rental by cultural groups, relieving the cultural group of the financial risks of ownership. Alternatively, facilities may be owned and operated by one or more resident non-profit cultural groups who bear the financial responsibilities of purchasing, financing, maintaining, repairing and/or upgrading their own building.

A complete inventory of all cultural infrastructure in Manitoba has not been attempted. Our knowledge of the total number and type of facilities, their location, ownership, usage, capacity and state of repair is somewhat limited. In the absence of such data at present, the following represents only an estimated summary of cultural infrastructure in Manitoba.

Manitoba is home to a significant number of designated historic buildings and many other heritage properties that help give our communities their unique identity and tourism potential. They are a touchstone linking us to our past while they contribute towards an environmentally and economically sustainable future. Fourteen of these designated buildings currently operate as museums or archives. Further data on how many heritage buildings are in use or adapted for re-use, is not available

at this time. The province, however, strongly supports adaptive re-use and has worked with other jurisdictions to establish best practises for heritage preservation and re-use.

Manitoba is home to 132 museums and 33 Accredited archives including The Manitoba Museum, seven signature museums, and 124 community museums.

Manitoba works with municipalities across the province to support 58 public libraries with 124 branch operations. This includes 33 independent municipal libraries, 20 regional libraries, and 4 pilot library services in partnership with Indigenous communities.

Manitoba Sport Culture & Heritage is aware of approximately 50 performing arts venues in Winnipeg and more than 50 others across the province.

Winnipeg is home to a small number of purpose-built primary spaces. Most of the Winnipeg venues, approximately two-thirds, are multi-purpose primary spaces intended for a range of cultural activities.

Outside of Winnipeg, an estimated almost 60% of venues are community centres, schools, churches, arenas, etc. that provide secondary space to cultural activities as peripheral to their primary role.

### *Government Support*

The Manitoba government supports cultural infrastructure through its own publicly owned and operated facilities, operating grants to resident non-profit cultural groups that own their own facility (arts groups, museums), operating and project grants to libraries, and heritage preservation project grants.

In honour of its centennial anniversary, the province established and set aside land for cultural purposes through legislation. In

addition to this legislative support, the province has worked with other levels of government on various initiatives:

- To build the centennial cultural infrastructure
- To cost-share on all major capital cultural projects
- Provide taxation relief, tax incremental financing, changes to zoning, and deficit reduction
- To establish the National Standards and Guidelines for Heritage Conservation
- To publish Building Resilience: Practical Guidelines for the Retrofit and Rehabilitation of Buildings in Canada

Manitoba's provincially owned infrastructure is managed by two separate crown agencies: Manitoba Centennial Centre Corporation and Centre culturel franco-manitobain. These crown agencies negotiate the use of the properties with a wide variety of resident and non-resident cultural groups.

### *Manitoba Centennial Centre Corporation*

The Manitoba Centennial Centre Corporation (MCCC) is responsible for the Centennial Centre Hall, The Manitoba Museum, the Royal Manitoba Theatre Centre, the Tom Hendry Warehouse Theatre, Lily Street storage warehouse, three surface parking lots and an underground parkade, the Artspace building, and the Manitoba Media Production Centre. Other major tenants include the Winnipeg Symphony Orchestra, Royal Winnipeg Ballet, and the Manitoba Opera Association.

*Centre culturel franco-manitobain*  
Centre culturel franco-manitobain is responsible for the centre culturel franco-manitobain, the

Centre du patrimoine, and the th  tre de Cercle Moli  re.

The department of Sport, Culture and Heritage provides some funding annually towards minimal capital repair and maintenance of these provincially owned properties.

There are provincial funding programs outside of the department that can be accessed by cultural organizations to respond to small capital projects or upgrades. These funds are not targeted to the cultural sector and are shared across the breadth of the non-profit sector.

### *Key Trends and Challenges*

The three key issues impacting cultural infrastructure in Manitoba are:

- An increased need to be flexible and adapt to changing standards, practices, and demographics
- The need for new resources and funding models
- The need for strategic long-term planning

The upcoming sesquicentennials shine a spotlight on aging centennial infrastructure, nearing 50 years old and approaching the end of their lifecycle. The urgency for repair and maintenance due to age has been compounded by underfunding. For example, the MCCC campus, conservatively valued at \$140 million, would minimally require annual capital maintenance funding of 1% of its value, or \$1.4 million. Its current grant toward all operations is \$440,000.

Centennial facilities face more than just building deterioration as they age. Technological advances, changing practises, modern fire/safety codes, and legislation of new standards for accessible infrastructure, mean

these and other cultural facilities in the province face becoming increasingly out of date. Major renewal is needed in order to respond to the needs of a modern public and to maintain our current standards of excellence throughout the 50 years to come.



Increasing operating costs have also had a particular impact on resident owners – cultural organizations who own and operate their own facility. Provincial support has remained static and other revenue sources, even when increasing, are not always enough to meet rising costs. This is especially burdensome for organizations carrying debt from the purchase or construction of their facility. The department has seen an unprecedented number of requests for extraordinary support from organizations in this situation in recent years.

Major renewal is needed to respond to the needs of a modern public and to maintain our current standards of excellence.

Demand for cultural programming only continues to increase in our communities. According to Canadian demographer, David K. Foot, the aging of our population is further

increasing our engagement in cultural activities as we move away from sports and its physical demands (Foot, 2002). Furthermore, sweeping global changes to how cultural products are created, preserved, stored, produced, marketed, exhibited, distributed, sold, consumed and shared are demanding greater flexibility and possibly a “rethink” of our cultural infrastructure.

These converging factors put strain upon existing resources and funding models. The provincial government cannot keep pace with growing demand in the sector, making partnerships a necessity.

While the re-creation of a cultural infrastructure stream within the federal government’s Building Canada Fund would remove one large barrier to our ability to proceed with major new cultural infrastructure, it alone is not enough to address the challenges facing the sector. Traditional partnerships between levels of government remain necessary but new funding models and tools that incentivize, leverage and facilitate new or under-utilized resources must be explored.

The provincial government cannot keep pace with growing demand in the sector, making partnerships a necessity.

The lack of up-to-date information limits our understanding of the overall ecology of cultural infrastructure. This includes the type, quantity and location of cultural infrastructure available, its capacity (people, seating, exhibition or storage etc.), how often it’s utilized, its ownership and its state of repair. Such data

collection would support long-term planning and more evidence-based decision-making on cultural infrastructure needs, efficiencies and opportunities. Long-term cultural infrastructure planning based on full knowledge of the existing ecology, would ensure the best investments with the greatest benefit to Manitobans.

## Indigenous Engagement and Impact

The infrastructure challenges facing many rural communities in general, exist within a larger context of depressed local economies, isolation, and distance. This is equally true of many Indigenous communities but is further magnified by the loss of traditional lands, language and ways of life.

Appropriate cultural infrastructure can be part of the remedy and response to these challenges. The importance of spaces for arts, craft and recreation to survivors of residential schools was identified within the Truth and Reconciliation Report; both as a mechanism for telling their story and as a tool to build resilience.

“Artists shared their ideas and feelings about truth and reconciliation through songs, paintings, dance, film, and other media.” (TRC Executive Summary)

For many residential school survivors, these activities offered an essential lifeline through an otherwise insufferable existence and to a meaningful future.

“On the rinks, the athletic fields, and parade grounds, or in the arts and handicraft rooms and on performance stages, many students found a way to express themselves, and, through that, gained the opportunity to explore their own talents and sometimes other parts of the country or the world. Most importantly,

they gained some confidence in their ability to achieve.” (TRC Executive Summary)

Obviously spaces to support creative expression like the “arts and handicraft rooms” or “performance stages” have a role to play both in exposing and sharing the truth of our collective story and in laying the groundwork for reconciliation.

Cultural spaces operated by and/or for Indigenous people range widely in their size, scope, and purpose in Manitoba. Some were mentioned in previous chapters. Other Winnipeg examples include:

- Manitoba Indigenous Cultural Education Centre (involved in heritage revitalization, library services and art exhibition)
- Circle of Life Thunderbird House
- Red Road Lodge/Edge Gallery
- Manitoba Inuit Association
- Ma mawi wi chi itata

Meeting the cultural programming and infrastructure needs of First Nation, M  tis and Inuit communities in Manitoba, both on and off reserve is a complex undertaking. These needs cannot be easily separated from other priorities including: mental, physical and spiritual health; education and training; language preservation; housing; traditional skills; social supports; and connection to the land.

## Questions About Cultural Infrastructure

1. What can be done to ensure that cultural spaces engage a broad range of citizens? How can a new cultural policy be used to maximize the role and contribution of cultural spaces to the well-being of all Manitoban communities?





2. Who needs to be engaged to ensure a long-term strategic approach to culture infrastructure planning?



## 12. General Discussion Questions

The information in this discussion paper and the questions below are intended to start a conversation about what should be in a new Culture Policy for Manitoba. The provincial government wants to hear from all Manitobans, whatever your current involvement with culture may be. Your voice will help ensure Manitoba's Culture Policy can reflect the insights, needs, interests and priorities of Manitobans.

Throughout this document, specific questions have been posed related to the specific areas of culture addressed by the new policy. The following is a set of general questions that will shape the decision-making about what a new policy should look like. Help the province understand what is meaningful to you, and your priorities for culture in Manitoba. Help create a new Culture Policy for Manitoba!

1. When was the last time you participated in an arts event in Manitoba? What was it and where did it take place? How much did it cost?
2. How can the province encourage people of all ages, ethnicities, incomes, and cultures to participate in arts and culture?
3. What is Manitoba currently doing well to support Arts and Culture in Manitoba? What would you like to see changed?
4. What changes do you expect to see in the future Arts and Culture landscape in Manitoba?
5. What can be done to strengthen and grow culture and creative industries in Manitoba so that they continue to support our social and economic well-being?
6. Are there leading practices or innovative models that Manitoba could learn from?
7. In a time of limited resources, what key priorities should Manitoba support?



## Instructions for Response:

You can provide input into the development of Manitoba's new culture policy in different ways:

1. Provide a written submission in response until **June 30, 2017**, using one of these options:
  - a. Complete the online consultation form that can be found at **[www.manitoba.ca/imaginecreative](http://www.manitoba.ca/imaginecreative)**
  - b. Send your submission or any questions by email to **[imaginecreative@gov.mb.ca](mailto:imaginecreative@gov.mb.ca)**. For full written submissions, Microsoft Word or PDF format is preferred.
  - c. Send your submission or any questions by mail to:

Manitoba Department of Sport, Culture and Heritage

Assistant Deputy Minister's Office

6<sup>th</sup> floor, 213 Notre Dame Avenue

Winnipeg, Manitoba

Canada R3B 1N3

2. Participate in a consultation event. A list of upcoming and past consultation activities will be made available and posted on **[www.manitoba.ca/imaginecreative](http://www.manitoba.ca/imaginecreative)** as events are confirmed.

For complete information and resources related to this consultation, please visit **[www.manitoba.ca/imagine creative](http://www.manitoba.ca/imaginecreative)**.

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