City of Richmond

Report to Committee

To:	Planning Committee	**Date:**	September 20, 2019
From:	Kim Somerville Director, Community Social Development	**File:**	07-3000-01/2019-Vol 01
Re:	**Non-Profit Social Service Agency Current and Future Space Needs**		

Staff Recommendation

1. That non-profit social service agency space needs be communicated to key stakeholders, including the Urban Development Institute, Vancouver Coastal Health, the Richmond School District, Richmond Members of the Legislative Assembly and Richmond Members of Parliament;

2. That the City and key stakeholders seek immediate opportunities to prevent the loss of at-risk, high priority social service agencies in Richmond as described in the staff report titled "Non-Profit Social Service Agency Current and Future Space Needs", dated September 20, 2019 from the Director, Community Social Development; and

3. That options to increase the supply of affordable non-profit social service agency space in the City Centre and other appropriate locations be identified.

Kim Somerville
Director, Community Social Development
(604-247-4671)

Att. 2

REPORT CONCURRENCE		
ROUTED TO:	**CONCURRENCE**	**CONCURRENCE OF GENERAL MANAGER**
Real Estate Services	☑	
Development Applications	☑	
Policy Planning	☑	
REVIEWED BY STAFF REPORT / AGENDA REVIEW SUBCOMMITTEE	**INITIALS:**	**APPROVED BY CAO**

Staff Report

Origin

At the May 22, 2019 Planning Committee meeting, the Richmond Community Services Advisory Committee (RCSAC) Non-Profit Social Service Agency Space Needs Review was considered and the following referral was made:

> *That staff work with the Richmond Community Services Advisory Committee to provide a list of members' current and future space needs and report back.*

This report addresses the above referral.

At the May 27, 2019 Richmond City Council meeting discussion of the RCSAC Non-Profit Social Service Agency Space Needs Review, Council resolved:

1. *That support be extended for the RCSAC to develop a database on space needs of non-profit social service agencies, to be updated and maintained biannually through surveys of agencies; and*

2. *That staff investigate potential options available to increase the supply of affordable non-profit social service agency space in the City Centre and other appropriate locations and report back.*

Staff will be reporting on the second referral, regarding potential options to increase the supply of non-profit social service agency space, in early 2020.

This report supports Council's Strategic Plan 2018-2022 Strategy #4 An Active and Thriving Richmond:

> *An active and thriving community characterized by diverse social and wellness programs, services and spaces that foster health and well-being for all.*
>
> *4.1 Robust, affordable, and accessible sport, recreation, wellness and social programs for people of all ages and abilities.*
>
> *4.2 Ensure infrastructure meets changing community needs, current trends and best practices.*

This report supports Council's Strategic Plan 2018-2022 Strategy #6 Strategic and Well-Planned Growth:

> *6.6 Growth includes supports and/or services for Richmond's vulnerable populations, including youth, seniors, individuals with health concerns, and residents experiencing homelessness.*

This report also supports the following Council-adopted Social Development Strategy Action:

> *Action 30 – Develop and maintain a database on space needs of non-profit social service agencies to be updated annually through surveys of agencies.*

Findings of Fact

The RCSAC has completed a two-phase review of non-profit social service agency space needs. The Richmond Community Foundation (RCF) provided a seed grant to the RCSAC to prepare a "Phase One" review, to demonstrate the need for and anticipated benefits of the proposed survey. A subsequent RCF grant of $10,000 was awarded to support the survey development and analysis ("Phase Two"), which the City supplemented with a 2018 Council Community Initiatives One-Time Expenditures grant of $13,000 to complete the project. The City also hosted the survey on Let's Talk Richmond.

At the May 22, 2019 Planning Committee meeting, the RCSAC Phase Two report, the "Richmond Non-Profit Social Purpose Space Needs Review", was considered (Attachment 1). This report provided comprehensive information about the overall need for space experienced by the non-profit social service sector in Richmond. As a result of the discussion at the Planning Committee, Council also identified the need for agency-specific information to assist the City and other stakeholders seeking opportunities to support agency efforts to secure office and program space. The May 27, 2019 Council referral regarding the Phase Two report, requesting that options available to increase the supply of non-profit agency space be investigated, will be addressed in a report coming forward in early 2020.

To gather the agency-specific data, a brief new survey instrument was developed by staff asking respondents to record their agency's office, program and meeting room space needs. The survey excluded residential uses (e.g., affordable housing, shelters) and child care space as separate City processes exist to assess and support demand. School-based programs were also excluded.

Of the RCSAC membership, 23 organizations were eligible to complete the survey, being non-profit social service agencies providing services other than the aforementioned exclusions. Five additional organizations that completed the initial space needs survey presented at the May 22, 2019 Planning Committee meeting were also surveyed. The attached table of results (Attachment 2) includes information provided by 22 non-profit social service agencies.

The following key points provide an overview of results. As some organizations operate more than one site, the numbers will sometimes exceed the number of participating organizations. An analysis of agency-specific information follows.

- Current premises range in size from 250 square feet to 12,000 square feet.
- Most sites are leased (19) while others are owned (2), rented (1) or provided in-kind by other organizations (2).
- While most have secure tenure (15), several do not (7).
- Two programs new to the community have secured funding but no location.
- Lease duration ranges from "ending this month" to 10 years, with most having two-year terms (9).

- Two premises are being rented monthly because development applications have been submitted.
- While several sites have adequate space (10), most sites (14) do not.
- Based on current space costs, most agencies (12) have insufficient funding for the additional square feet required, at current rates; others were unsure (7), while some (5) indicated having sufficient resources to expand.
- Two agencies reported recent moves to new locations due to pending redevelopment, and one agency relocated program space due to funding uncertainty.

Analysis

Agency-Specific Information

The following analysis groups agencies by three main themes: (1) lack of premises, (2) insecure tenure and (3) the need for additional space.

1. Lack of Premises

The following table identifies agencies without premises for the following purposes:

Organization	Purpose	Address	Needed Space (SF)*	Space Funding Available
Multicultural Helping House Society**	Office for staff to organize 55+ and youth activities	N/A	200–400	Unsure
Richmond Addiction Services Society	Foundry Youth Services Centre	N/A	8,500–12,000	Yes
Richmond Society for Community Living	Community Inclusion Program	N/A	2,500–3,000	Yes
Total			**11,200–15,400**	

**Please note that this organization is undergoing significant administrative challenges and needs to stabilize prior to further consideration of space needs.

Richmond Addiction Services, as the lead agency, has been seeking a location for a Foundry Youth Service Centre for over a year. Foundry Youth Service Centres are integrated health and social service centres for those aged 12 to 24 years, providing a one-stop-shop to access mental health care, substance use services, primary care, social services and youth and family peer supports. While provincial funding for a Richmond centre has been secured, this centre may be lost to the community if a viable location cannot be found.

Also funded, the Richmond Society for Community Living has the opportunity to provide a new Community Inclusion Program in Richmond providing daily care for youth with intellectual disabilities who are no longer in school. A site for this program has not been found.

2. Insecure Tenure

The following agencies have insecure tenure, as they are renting on a monthly basis or have a temporary lease only. While several other sites listed in Attachment 1 have a two-year lease, this does not imply insecure tenure as most (7 of 10) of those are Richmond Caring Place tenants.

Organization	Address	Length of Tenure	Current Space (sq. ft.)	Total Space Needed (sq. ft.)*	
				Short Term (0–5 years)	Long Term* (10–15 years)
Community Mental Wellness Association of Canada	250–5726 Minoru Blvd.	Monthly rent (Development Application submitted)	1,500	1,500	1,500
Connections Community Services	110–5751 Cedarbridge Way	5-year lease (no option to renew)	5,100	4,000	4.000
Richmond Chinese Community Society	205–8271 Westminster Hwy.	5-year lease (no option to renew)	2,300	5,300	5,300
Richmond Food Bank Society	100–5800 Cedarbridge Way	5-year lease (expires 2022, may be renewed if property not developed)	8,848	8,848	8,848
Richmond Multicultural Community Services (Program Space)	110–5751 Cedarbridge Way	6-month lease, may be renewed	1,465	Unsure	Unsure
Richmond Society for Community Living (Quantum Community Inclusion Site)	170–5270 Minoru Blvd.	Monthly rent (Development Application submitted)	3,082	3,082	3,082
Turning Point Recovery Society (Homelessness Resource/Drop-in Centre Site)	8280 Gilbert St.	6-month lease although negotiating extension (ends Dec.31)	1,500	2,500–3,500	2,500–3,500
Total			**23,795**	**25,230–26,230**	**25,230–26,230**

*Rough estimates only; will be impacted by future population growth, contract renewal terms and other factors.

As illustrated in the table above, space needs for these sites is currently not estimated to increase significantly over the next 15 years. However, replacement space is urgently needed due to the lack of secure tenure. Of these organizations, three are at high risk of imminent displacement; two due to development applications having been submitted and one due to a sublease termination; and another may be at risk if the current lease, ending in December 2019, is not extended. These high risk locations are:

- Community Mental Wellness Association of Canada (250–5726 Minoru Boulevard, development application submitted)
- Richmond Society for Community Living, site for the RSCL's Quantum Community Inclusion Program (170–5270 Minoru Boulevard site; development application submitted)
- Richmond Society for Community Living (site for the Infant Development and Supported Child Development Programs, sublet at 7000 Minoru Boulevard, terminates in three months)
- Turning Point Recovery Society (Homelessness Resource/Drop-in Centre, 8280 Gilbert Street, expiring December 31, 2019)

If unable to secure space, the loss of these programs to the community would have a significant impact on the many residents and their families who rely on these services. To illustrate, loss of the Richmond Society for Community Living's (RSCL) Quantum Community Inclusion Program would displace 30 people with intellectual disabilities requiring daily care, with significant impacts to their families as well. The loss of RSCL Infant Development and Supported Child Development programs would mean the loss of support for the families of 700 children in Richmond.

Three agencies with insecure premises at the time of the survey (June 2019) have since relocated to the sites indicated in Attachment 2:

- Connections Community Services (moved from 7900 Alderbridge Way to 5751 Cedarbridge Way in August 2019 with a five-year lease for 5,100 square feet);
- Touchstone Family Association (moving from 6411 Buswell Street to 3031 Viking Way in October 2019 with a 10-year lease for 12,000 square feet).
- Richmond Multicultural Community Services (program space moved from 4351 No. 3 Road to 110-5751 Cedarbridge Way with a six-month lease, due to federal funding uncertainty, for 1,465 square feet)

Of these, only Touchstone's new location is reasonably secure with a 10-year lease, although it is located in Bridgeport and client access may be a challenge. Connections Community Services' five-year lease does not include a renewal option. Richmond Multicultural Community Services is sub-leasing two program rooms from Connections Community Services on a temporary basis until the status of their Immigration, Refugees and Citizenship Canada contract has been determined following the federal election.

3. Larger Premises Needed

Many agencies are in need of larger premises due to insufficient administration and program space to accommodate clients and staff, as well as to incorporate new programs to meet growing and changing community needs.

The figures provided below are anticipated estimates of future needs due to the challenge of forecasting in uncertain conditions (e.g., changing funding levels and priorities). Also, non-profit societies may be better equipped to estimate space needs following a Real Estate Foundation workshop to be held later this fall (see Next Steps, below).

Organization	Address	Current Space (sq. ft.)	Additional Space Needed (sq. ft.)		Sufficient Funds to Expand
			Short Term (0–5 years)	Long Term (10–15 years)	
Autism BC	3688 Cessna Drive	750	100	250	Unsure
Chimo Community Services	120–7000 Minoru Blvd.	2,469	2,000	2,000	Yes
Chimo - Counselling	310–7000 Minoru Blvd.	500	500	1,000	Yes
Pathways Clubhouse	315–8111 Granville Ave.	11,000	4,000	4,000	Yes
Richmond Cares, Richmond Gives (RCRG)	190–7000 Minoru Blvd.	1,760	200	400	No
RCRG – Child Care Resource and Referral	325–7000 Minoru Blvd.	583	340	500	No
Richmond Centre for Disability	842–5300 No. 3 Rd. (interim site with anticipated move to City-owned 5671 No. 3 Rd. when complete)	5,300		2,000	No
Richmond Chinese Community Society	205–8271 Westminster Hwy.	2,300	3,000	0	Unsure
Richmond Family Place Society	8660 Ash St.	3,800		300	No
Richmond Mental Health Consumer & Friends Society	210–7671 Alderbridge Way	510	300–500	300–500	No
Richmond Multicultural Community Services	210–7000 Minoru Blvd.	2,500	2,500	5,000	No
Richmond Women's Resource Centre	110–7000 Minoru Blvd.	709	400	800	Unsure
Turning Point Recovery Society: Homelessness Resource/Drop-in Centre	8280 Gilbert Rd.	1,500	2,500–3,500	2,500–3,500	No
Total		**33,681**	**15,840–17,040**	**19,050–20,250**	

Summary

While the primary purpose of the survey was to obtain agency-specific information as provided in Attachment 2, the following summary of additional space needs provides short and long-term goals for agencies, partners and stakeholders to consider. Results indicate that between approximately 52,000 to 105,000 additional square feet of agency space will be needed in the community over the next 15 years.

Type of Need	Short Term (0 to 5 years) (SF)	Long Term (10–15 years) (SF)
Lack of premises	11,200 to 15,400	No additional need identified
Insecure tenure	25,230 to 26,230	25,230 to 26,230
Larger premises	15,840 to 17,040	19,050 to 20,250
Total Additional SF Needed	**52,270 to 58,670**	**44,280 to 46,480**

In completing this survey, agencies consistently conveyed that clients and their families are negatively impacted by insufficient, insecure or inappropriate space, as the number and type of programs that can be offered, and clients that can be served, is limited or at risk. The ability to offer new programs is also hindered. Compounding these challenges is increased demand, resulting from an ever-growing population, and insufficient or unstable space. In addition to the size of space, characteristics and location are also significant factors impacting client service (e.g., the need for accessible features, proximity to transit and sufficient parking).

Commensurate with the inability to adequately support clientele, agencies also experience staff-related challenges stemming from insufficient space, including the inability to adequately house staff due to the lack of administrative space, and the related challenges of effectively administering and managing programs. The search for space is also placing considerable demands on staff time, resulting in less time devoted to agency mandates. Furthermore, many agencies seeking larger premises are faced with the challenge of having insufficient funds to afford additional space at current rates.

Next Steps

The Social Purpose Real Estate Collaborative (SPRE), an alliance of foundations, government, financial institutions, agencies and investors supporting non-profit/social enterprise space needs, of which the City is a member, will be providing a Real Estate Foundation of BC workshop to Richmond non-profits (all sectors) this fall. The workshop, designed to build capacity about real estate fundamentals and related financing, will increase the non-profits' capacity to estimate current and future space needs and knowledge regarding supports that might be available in the region. SPRE will also be conducting a regional survey of non-profit and social enterprise space needs, including Richmond, later this year. Survey results will supplement those acquired in the 2018 RCSAC survey and will contribute to the Non-Profit Space Needs Database under development.

A staff report responding to the May 27, 2019 Council referral, to "investigate potential options available to increase the supply of affordable non-profit social service agency space in the City Centre and other appropriate locations and report back", is anticipated in early 2020.

This report will provide Council with options regarding roles that the City might play to support agency efforts to meet their space needs. Availability of space in City, School District and faith community premises will also be explored.

In the meantime, the information outlined in Attachments 1 and 2 and in the forthcoming report will assist the City, agencies and stakeholders in understanding the needs, circumstances and challenges of non-profit social service real estate in Richmond, and will hopefully lead to collaborative efforts to arrive at viable solutions to support the sector before services are lost to the community.

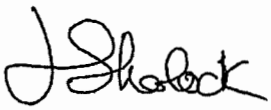
Financial Impact

None.

Conclusion

Agencies without premises and those faced with imminent loss of premises have an urgent need for space that may result in lost services to the community, significantly impacting the well-being of those served and their families, with ripple effects felt throughout the community. In addition to a lack of premises and lack of security, the need for additional space experienced by many agencies is a significant impediment to service delivery and hence to residents in need of social supports.

Staff will provide a report in early 2020 exploring options to increase the supply of affordable non-profit social service agency space, including potential spaces available in City-owned, School District and faith community premises. In the meantime, all opportunities to support the sector's space needs will need to be pursued without delay to ensure residents' access to critical services.



Lesley Sherlock
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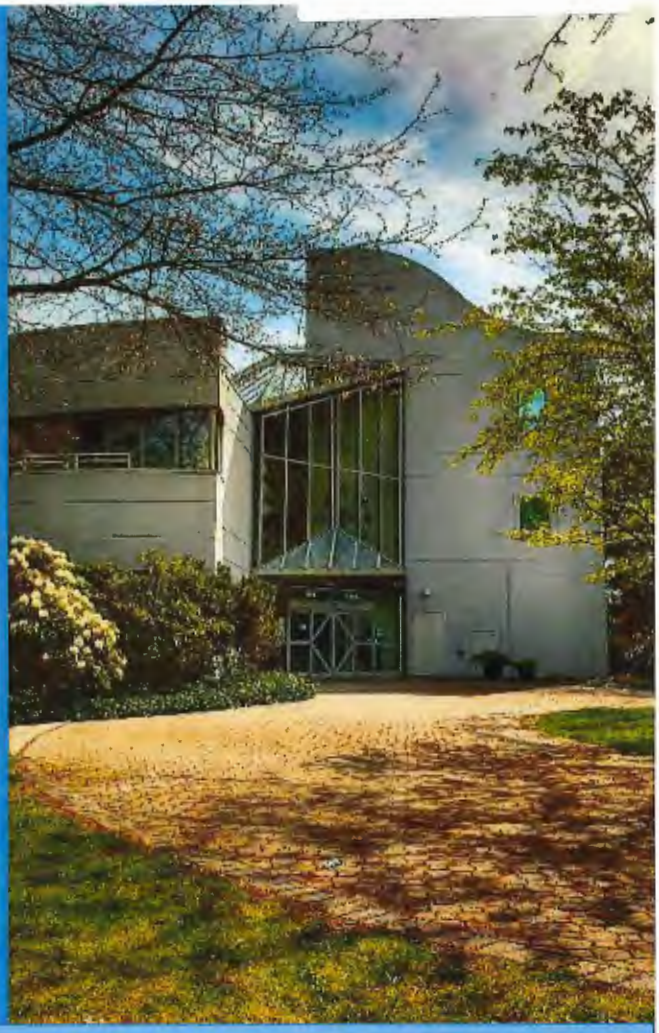
Att. 1: RCSAC Non-Profit Social Purpose Space Needs Review
Att. 2: Agency-Specific Space Needs Table



PHASE 2 RICHMOND NON-PROFIT SOCIAL PURPOSE SPACE NEEDS REVIEW

Understanding the Real Estate Challenges and Opportunities Affecting the Non-Profit, Social Purpose Sector in Richmond

Prepared for:
The Richmond Community Services Advisory Committee

Prepared by:
Krystie Babalos and Theo Finseth

August 9, 2018

This report was made possible because of the generous contributions from the Richmond Community Foundation and the City of Richmond.

EXECUTIVE SUMMARY

The City of Richmond is the fourth largest community in Metro Vancouver. It is a diverse city focused on building a modern urban centre and regional hub surrounded by compact communities, green spaces, parks, recreation, farmland and the Fraser River.

Richmond's population is growing and demands for social services are rising. The City has a long history of working with social purpose non-profit organizations (NPOs) to provide social services to realize its vision of being the most appealing, liveable, well-managed community in Canada.

In Richmond, there are over 344 groups, clubs, associations, and NPOs that provide essential social services.[1] However, securing land, buildings, and tenancy for social purpose organizations has been increasingly challenging in Richmond due to issues of affordability, funding uncertainty and availability of suitable and appropriately located space. Also challenging is the ability of governments, funders, investors and developers to assist organizations in their pursuit of space due to the lack of comprehensive data on the full scope of the issues in Richmond.

The Richmond Community Services Advisory Committee (RCSAC) recognizes this data gap and have launched a multi-phase review of commercial and industrial space needs to gain a better understanding of the real estate situation facing social purpose non-profit organizations in Richmond.

In Phase 1, RCSAC conducted a preliminary review of relevant policy and work done to date in Richmond and began to identify the problem. Now in Phase 2, RCSAC seeks to better understand the space needs of social purpose non-profit organizations and to identify strategies that increase access to secure, affordable and appropriate commercial and industrial space.

The Phase 2 Richmond Non-Profit Social Purpose Space Needs Review report summarizes what was done and learned in Phase 2 with respect to space needs, challenges, opportunities and recommendations for moving forward.

PROJECT SUPPORTERS

The Richmond Non-Profit Social Purpose Space Needs Review is a study by the Richmond Community Services Advisory Committee (RCSAC), an advisory body to Richmond City Council on social, health and community matters. RCSAC has served the City since 1979 and is composed of more than 30 local non-profit organizations and government, community and agency representatives working collectively on community issues of mutual concern. The Review was also generously supported by the City of Richmond and the Richmond Community Foundation.

RESEARCH METHODS

The Richmond Non-Profit Social Purpose Space Needs Review is a comprehensive review of current and emerging real estate factors affecting social purpose non-profit organizations in Richmond. A detailed work plan was developed during the planning phase of the project which determined the purpose, topics and research questions to address and the methodologies that would be used to collect data.

The methodologies included:

1. **A review of the real estate market** to gain an understanding of the overall market context and trends in Richmond and the supply and demand for commercial and industrial space.

[1] City of Richmond. About Community Organizations. https://www.richmond.ca/discover/com-resources/organizations/about.htm. Retrieved March 20, 2018

2. **A policy and regulatory scan** of relevant local government plans, policies and regulations that guide, regulate and support the non-profit sector on a variety of real estate, financial and non-financial matters.
3. **Development of a database of non-profit social service organizations in Richmond**. To understand the space needs of non-profit social purpose organizations in Richmond, RCSAC defined, prioritized and developed a list of target non-profit social service organizations based in Richmond to consult in the process. Through this process, it was determined that there were over 344 organizations active in Richmond in 2018, of which 163 are non-profit organizations in general and 65 are social purpose organizations.
4. **A survey of non-profit social purpose organizations** to provide a robust and up-to-date review of commercial and industrial space needs that will form a baseline of NPO space-related information that can be tracked, monitored and evaluated over time.
5. **A review of recommendations for moving forward** that outline key opportunities and strategies for government, NPOs, and the private sector to explore to overcome barriers to social purpose real estate.

RESEARCH FINDINGS

BACKGROUND

The Background is summarized below, and outlined in detail in Section 3: Background.

In Richmond, the non-profit sector plays an important role in addressing the communities' social needs. There is a long history of not-for-profit delivery of essential social services. Services provided are widespread, serving all household types, interests, and needs. NPOs also offer opportunities for the 'community to support community' and to contribute to the local economy, where people give and receive services, through direct engagement as board members, employees, contract workers and volunteers.

There are many space-related challenges that affect emerging and established NPOs. According to the *Vancity Housing Affordability Report*, the City of Richmond is ranked in the top ten least affordable markets in BC in all categories of housing.[2] Part of the affordability issue for NPOs can be attributed to the high demand for land for housing and high property costs, which impact prices for all space typologies including commercial, institutional, and industrial space. Hence, NPOs are experiencing higher purchase and rent prices for commercial and industrial space than before. They also face an inventory that may not fit their needs, and low vacancy rates that make it difficult to shop for the right space. They face inequitable access to the right financial tools, cost imbalance issues, and risky lease or mortgage terms. They may have knowledge or skills gaps that limit their ability to navigate real estate markets. Some of the newest developments are also not concentrated in the city centre, where many NPOs prefer to be located to best serve residents. There are also gaps in City planning process, where NPO space is often not considered a critical amenity contribution in the development of key urban areas.

MARKET ANALYSIS

The Market Analysis is summarized below, and outlined in detail in Section 5: Real Estate Market Overview.

OFFICE SPACE MARKET SUMMARY

Richmond has the third highest office space supply in Metro Vancouver, at 5.39 million square feet of office space or 8.4% of total office supply in Metro Vancouver. Richmond's vacancy declined to 5.4% in the first quarter of 2018 from 8.7% a year earlier - and is at its lowest point since mid-year 2002. Specifically, Richmond is experiencing low vacancy rates for Class B and Class C office space, at 4.6% and 0.4% respectively. The main reasons for the decrease are due to the completion of developments in 2017 and the relocation of tenants, which resulted in space being occupied towards the end of 2017. Office space

[2] Vancity: Home Stretch: Comparing housing affordability in B.C.'s hottest markets https://www.vancity.com/SharedContent/documents/News/Vancity-Report-Housing-affordability-in-BCs-hottest-markets.pdf Retrieved April 6th., 2018

vacancy rates may remain low and NPOs looking for new or additional office space may find it difficult to find and secure appropriate office space in different sizes and key locations.[3]

INDUSTRIAL SPACE MARKET SUMMARY

Richmond has the second highest inventory of industrial space, with 34.63 million square feet of industrial space or 24.2% of the total supply in Metro Vancouver. Vacancy in Richmond's industrial market declined to 2.0% in the first quarter of 2018, down from 2.7% in the first quarter of 2016 due to strong leasing activity and limited new construction. This is slightly the average industrial space vacancy rate (1.8%) in Metro Vancouver. Richmond does have lower than average asking net rental rates for industrial space but pricing has and is anticipated to continue to rise as new supply for lease may be unable to keep up with demand and may have a negligible impact on vacancy in the future. Industrial space vacancy rates may remain low, and could put increasing pressure on prices. NPOs looking for new or additional industrial space may find it difficult to find and secure increasingly rare industrial space, either for lease or purchase options.[4]

SURVEY

The Survey is summarized below, and outlined in detail in Section 7: Survey Findings.

ORGANIZATION PROFILES

A key objective of the survey is to better understand social purpose NPOs in Richmond. Highlights from the survey findings show that respondents are both registered not-for-profits and charities that serve a diversity of populations that live and commute to their programs and services from across the city. The majority (49%) of respondent NPOs serve between 1000-5000+ community members. To serve these users, the majority of respondents have 10 or more full-time employees (22%), part-time employees (14%) and volunteers (19%) per week while others have 21 to 100 full-time employees (12%) and 51 to 100 volunteers (14%). With almost 80% of NPO staff working on site, most NPOs projected they will continue to increase all worker types in the future to accommodate growing program and service needs. NPOs will need significant commercial and industrial space to accommodate growing programs, services and personnel.

CURRENT SPACE & NEEDS

A key objective of the survey is to understand NPOs current space needs. Highlights from the survey findings show the majority of respondents have one site (40%) in Richmond that is their sole location (39%) or primary / head office (32%) and mainly consists of a public or community facility (44%), office building (33%) or multi-use building (28%). Nearly half (47%) of all respondents share space with other organizations in some capacity. In terms of location, 85% of respondents serve people from across the City of Richmond and 69% would like to relocate or have a new space located in Richmond City Centre to conveniently serve these clients.

Nearly half of all survey respondents have or plan to add or expand existing programs and services this fiscal year while the other half plan to maintain current programs and services. This translates into 41% of survey respondents planning to expand, increase or add an additional location to their space in Richmond. Overall, most survey respondents perceive that it is very important to remain located in the City of Richmond (90%) while most are somewhat or very satisfied (72%) with their current space. Nevertheless, 62% of survey respondents indicated that their current space has inhibited their ability to provide programs or services.

TENURE & STABILITY

A key objective of the survey is to understand NPOs space tenure, stability and future needs.

Highlights from the survey findings show respondents relationship to their commercial and industrial space varies: 26% lease or rent space from the private sector, 23% use space that is donated to them at no cost, 10% lease or rent space from government and 8% sub-lease space from another organization. The length

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[3] Avison Young. 2017 Year End Office Market Report Metro Vancouver, BC. http://www.avisonyoung.ca/documents/95750/1691318/Avison+Young+Office+Market+Report_2017+Year+End.pdf Retrieved April 13, 2018

[4] Avison Young. Spring 2017 Richmond / Delta Industrial Report.http://www.avisonyoung.com/documents/20342/570840/Vancouver_RichmondDeltaIndustrialReport_Spring2017.pdf/ceb6404e-af92-4a3a-a795-bc963c5ac894?t=-1998248972. Retrieved April 13, 2018

of lease/rental terms vary, with 55% of survey respondents having a lease or rental term of 1 to 5 years and 14% having a term of 5 or more years. 70% of survey respondents are very or somewhat secure in their space while 19% are not, or not very, secure in their space.

In looking to the future, respondent NPOs have identified a need to and interest in expanding their space. Within the next 5 to 10 years, 28% of respondents plan to expand space, 28% plan to maintain their space, and 13% plan to add a location in Richmond. 56% of the respondents who own space would like to redevelop their property. However, there is still a high level of uncertainty amongst NPOs who lease/rent space, with 35% not knowing if they need to move in the coming years. In the event that a respondent has to move, the top reasons for moving include rental / lease expiration, adding / expanding / growing programs and services, donated space being removed, demolition clauses being executed, a reduction in available space, financial uncertainty, changing location and needs of clients and reducing / removing programs or services. In a future move, respondents indicated the top factors to consider in a new space are location, proximity to clients / users, the features of the space and proximity to transit.

AFFORDABILITY

A key objective of the survey is to better understand the issues of affordability that NPOs in Richmond may be experiencing. Highlights from the survey findings show that the majority of respondents (63%) have small operating budgets of less than $500,000 per year, while 29% have budgets between $1 and $5 million per year and 13% have budgets of more than $7.5 million per year. Of the organizations who own property, 40% have significant space-related costs of $20,000 or more per month. Of the organizations who lease or rent space, 23% use space donated at no cost, 22% spend $1,000 - $1,999 per month, 21% spend $5,000 - $9,999 per month and 21% spend $10,000 or more per month on space-related costs.

In terms of affordability, 72% of survey respondents said they are paying the right amount for space relative to what they can afford while 18% are paying more for space relative to what they can afford. The high response to "right amount" could reflect that many respondent NPOs (23%) use space donated at no cost, 10% lease or rent space from government and 8% pay below market rents. Among NPOs that pay market rents / lease rates, the average rent is $18.03 per square foot, similar to the $18.37 per square foot average lease / rental rate of office space in Richmond. Many organizations identified free donated space, space payed for at a nominal price and subsidized space as key to their survival and operations.

CHALLENGES & OPPORTUNITIES

A key objective of the survey is to understand NPO's key space-related challenges and opportunities. Highlights from the survey findings show that the main challenges related to social purpose real estate are the ability of NPOs to find and access suitably located space, the affordability of space, the limited supply and increasing demand for space and obtaining reliable and stable funding for space.

Survey respondents also identified numerous strategies to respond to these challenges including diversifying their organization's revenue streams, creating Fund Development Plans, growing the organization's operations and partnering with other social purpose organizations. Survey respondents are also interested in exploring opportunities to network with planners, space providers, developers and other NPOs (64%), to generate more revenue for space by finding new donors, fundraising and improving capital campaigning (51%), to seek financing and funding through grants, property tax exemptions, low interest loans and assistance (46%) and to plan to co-locate with other organizations (46%). The top suggestions respondents recommended for funders, advocacy groups and/or governments to assist them in achieving affordable, suitable and secure space are to increase government funding, increase the supply of accessible, affordable and shared spaces, improve property tax exemptions, engage in NPO space-related policy development, funding decisions and update zoning bylaws.

CONTENTS

1. INTRODUCTION

The City of Richmond is the fourth largest community in Metro Vancouver. With the population growing and demands for social services rising, the City has a long history of working with social purpose non-profit organizations (NPOs) to provide services that help to realize its vision of being the most appealing, liveable, well-managed community in Canada.

At the same time, the rapid pace of growth has coincided with commercial and industrial affordability challenges for NPOs. NPOs are struggling to find social purpose real estate space close to the communities they serve, which impacts their ability to deliver services that keep pace with growth and that maintain or improve residents quality of life. Affordable, centrally located, accessible and secure space is needed, but it is difficult to acquire due to market conditions, limited funding, competing land and development opportunities and so on.

The Richmond Community Services Advisory Committee (RCSAC), an advisory body to Richmond City Council on social, health and community matters, launched a review of Richmond Non-Profit Social Purpose Space Needs to understand the state of social purpose real estate in Richmond and to guide planning and action for the future.

In Phase 1, RCSAC conducted a preliminary review of relevant policy and work done to date in Richmond and began to identify the problem. Now in Phase 2, RCSAC seeks to assess the commercial and industrial space needs of non-profit organizations so that they can have a clearer picture of social purpose real estate in Richmond and put forward recommendations for how the public and private sector can help to advance affordable, centrally located, accessible and secure space for the non-profit sector.

Through this Review, the Committee is working to create an equitable sense of place that honors both Richmond's history and its future.

SCOPE OF STUDY

The Richmond Community Services Advisory Committee (RCSAC) aims to understand the state of social purpose real estate in Richmond and to guide planning and action for the future.

NPOs depend on commercial and industrial space to operate their programs and services. The RCSAC therefore, focused on a selection of social purpose non-profit organizations operating in Richmond, that have and/or need commercial and industrial space. This excludes parking, housing sites and child care facilities.

SOCIAL PURPOSE REAL ESTATE DEFINED

The Social Purpose Real Estate Collaborative (SPRE), an informal consortium of funders and investors who develop a collective understanding of the use of social purpose real estate as a sustainability strategy for not-for-profit partners and investees and help secure real estate assets for community purposes, define social purpose real estate in two parts[5]:

1. Social purpose: organizations with a mission to provide community benefits
2. Real estate: the property and/or facilities rented, leased, or owned and operated by social purpose organizations

Together, SPRE refers to social purpose real estate as "property and facilities owned and operated by organizations and investors for the purpose of community benefit, and to achieve blended value of returns".

[5] Real Estate Institute of BC and the Social Purpose Real Estate Collaborative. RENT – LEASE – OWN: Understanding the Real Estate Challenges Affecting the Not-For-Profit, Social Purpose and Cultural Sectors in Metro Vancouver. Retrieved March 28, 2018

For the purpose of this review, social purpose (SP) non-profit organizations were categorized by the following activities:

1. Advocacy;
2. Arts and Culture;
3. Childcare;
4. Youth;
5. Women;
6. Seniors;
7. Families;
8. People with Disabilities;
9. Community Development;
10. Settlement Services;
11. Education;
12. Employment and Training;
13. Animal rights;
14. Energy;
15. Environment;
16. Food Security;
17. Health Services;
18. Mental Health / Addictions;
19. Housing;
20. Homelessness;
21. Poverty Reduction;
22. Human Rights;
23. Legal Services;
24. Religion / Faith;
25. Recreation / Sport;
26. Transportation / Mobility;
27. Waste Management; and
28. Other.

For the survey, respondents were asked to self-identify their primary activity (with an opportunity to list other activities they are involved in, if applicable).

2. PURPOSE

The Richmond Non-Profit Social Purpose Space Needs Review aims to assess social purpose non-profit organizations' space needs and to improve access to affordable, appropriate and secure commercial and industrial space.

The review is intended to:

- Inform, involve and consult social purpose non-profit organizations on current and projected future real estate needs
- Increase understanding of the reality of social purpose real estate in Richmond, specifically commercial and industrial space, and establish baseline data that can be tracked over time
- Outline policies and regulations that support social purpose real estate in Richmond
- Identify strategies to:
    - Resolve NPO real estate barriers
    - Renew, replace and increase space for NPOs to provide essential social services
    - Strengthen and reduce displacement of existing and legacy NPOs in Richmond
    - Make it more viable for new and emerging NPOs in Richmond to thrive
- Inform government policy and private sector practices with appropriate information and tools that address barriers to and opportunities for social purpose real estate.

3. BACKGROUND

Commercial and industrial affordability involves a complex and interrelated set of issues and strengths that affect NPOs in a variety of ways.

Both financial and environmental pressures can affect emerging NPOs and contribute to the displacement of established organizations. Not only are Richmond NPOs experiencing higher purchase and rent prices for commercial and industrial space than before, they are also facing an inventory that may not fit their needs, low vacancy rates that make it difficult to shop for the right space, funding uncertainty, inequitable access to the right financial tools and risky lease or mortgage terms.

Here is a summary of the importance of NPOs in Richmond as well as the challenges they face as they engage with the real estate market.

THE IMPORTANCE OF THE NON-PROFIT SOCIAL PURPOSE SECTOR

DIVERSE SCALE & RANGE OF SERVICES DELIVERED ON NON-PROFIT BASIS

The nonprofit sector plays an important role in addressing many of the social deficits in Canada -- with NPO missions often in alignment with a future residents want - one that is more equitable, inclusive and environmentally responsible. In Richmond, there is a long history of not-for-profit delivery of essential social services. Services provided are widespread, serving all incomes, ages, household types, interests, and needs. Social services include infant care, the provision of housing, education, emergency, medical and health services, parenting and family services, child and youth programming, arts and culture, food security, and sport, fitness and recreation. In Richmond, there are over 344 groups, clubs, committees, associations, and NPOs that provide social services.[6] Of these, an estimated 27 groups provide special interest services, 78 provide sports, fitness and recreation services, 76 provide arts, heritage and culture services and 163 provide social and community services.[7]

COMMUNITY SUPPORTING COMMUNITY

The nonprofit sector provides many opportunities for 'community to support community' and for people to both provide and receive services, especially through direct engagement in the delivery of social services as board members, employees, contract workers and volunteers. In BC, almost 2.3 million people volunteer in the sector with an average of 145 annual hours volunteered.[8] In Richmond, there are over 200 volunteer community organizations and over 50 advisory committees and task forces that provide residents with opportunities to support each other.[9]

FINANCIAL CONTRIBUTIONS

The nonprofit sector is financed by income earned from the sale of memberships and services, from government funding and donations from individuals.[10] British Columbians in particular are charitable: nine-in-ten people donated money to a charitable or non-profit organization in the past year (2016 - 2017).[11] In

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[6] City of Richmond. About Community Organizations. https://www.richmond.ca/discover/com-resources/organizations/about.htm. Retrieved March 20, 2018

[7] City of Richmond. About Community Organizations. https://www.richmond.ca/discover/com-resources/organizations/about.htm. Retrieved March 20, 2018

[8] Statistics Canada. Volunteering and Charitable Giving in Canada. http://www.statcan.gc.ca/pub/89-652-x/89-652-x2015001-eng.pdf Retrieved April 22, 2018

[9] City of Richmond. Fast Facts About Richmond. https://www.richmond.ca/__shared/assets/FastFacts6257.pdf Retrieved April 13, 2018.

[10] Imagine Canada. 2015. Charities in Canada as an Economic Sector Discussion Paper. Retrieved April 22, 2018http://www.imaginecanada.ca/sites/default/files/imaginecanada_charities_in_canada_as_an_economic_sector_2015-06-22.pdf. Retrieved April 13, 2018.

[11] Insights West. Charitable Giving Insights. https://insightswest.com/wp-content/uploads/2017/09/RPT_InsightsWest_2017BCCharitableGivingInsightsReport_20Sept2017.pdf. Retrieved April 13, 2018

2016, a total of $1.478 billion charitable donations were made in BC.[12] In Metro Vancouver, the value of charitable donations was $868,590,000 with the median donation per taxfiler $460.[13]

CONTRIBUTION TO ECONOMY

The nonprofit sector has expanded in the last two decades and is now a major sector, supporting jobs and creating significant economic growth. This growth is driven by demand for services and the value services produce.[14] The sector is in many ways similar to the small business sector and makes a similar contribution to jobs and growth. The jobs created are good ones, requiring skills and higher education levels. The sector is also a good first employer for graduates and new Canadians. In Canada, the total charitable sector contributed 8.1% of GDP in 2008, with the nonprofit sector employing nearly as many people as manufacturing, and more people than construction, agriculture, forestry and utilities.[15]

In Richmond, full-time and part-time employees accounted for some 126,000 in 2011.[16] Richmond has the second highest jobs to employed labour ratio (1.36) in the region, with 7.2% of occupations in education, law and social, community and government services (7,915 jobs), 3.6% in health occupations (3,985), and 2.5% in art, culture, recreation and sport (2790 jobs).[17] Specific information on Richmond's social purpose sector does not exist.

THE CHALLENGES WITH SOCIAL PURPOSE REAL ESTATE

SPACE IS BECOMING MORE EXPENSIVE

In the City of Richmond, land values and lease rates have been rising. Asking office rents have increased by 27% since 2013 and asking rents for industrial spaces have increased by 11% since 2013.[18] Several factors contribute to industrial and commercial affordability issues, including the speculative market, property tax increases, limited tenant rights, and a lack of representative bodies to advocate for industrial and commercial NPO tenants.

SPACE IS HARDER TO FIND

In the City of Richmond, commercial and industrial space for NPOs is becoming harder to find. Decreased availability of commercial space is challenging with Richmond's low vacancy rates. The office vacancy rate was low at 5.4% and the industrial vacancy rate was very low at 2%, both in the first quarter of 2018. Some landowners also prefer to lease space to businesses rather than NPOs as they are seen as less risky and more stable tenants. Some NPOs have difficulty finding space in the City Centre that is suitable for NPO use, and space that is available has experienced price / rent increases.

AVAILABLE SPACE IS INCREASING ON THE OUTSKIRTS OF THE CITY

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[12] Stastics Canada. 2016. http://www.statcan.gc.ca/daily-quotidien/180214/t001a-eng.htm Retrieved April 23, 2018

[13] Statistics Canada. 2016. Table 2 Charitable Donations - Census Metropolitan Areas. https://www.statcan.gc.ca/daily-quotidien/180214/t002a-eng.htm. Retrieved May 31, 2018

[14] Imagine Canada. 2015. Charities in Canada as an Economic Sector Discussion Paper. http://www.imaginecanada.ca/sites/default/files/imaginecanada_charities_in_canada_as_an_economic_sector_2015-06-22.pdf. Retrieved April 13, 2018

[15] Imagine Canada. 2015. Charities in Canada as an Economic Sector Discussion Paper. http://www.imaginecanada.ca/sites/default/files/imaginecanada_charities_in_canada_as_an_economic_sector_2015-06-22.pdf. Retrieved April 13, 2018

[16] Statistics Canada, 2011 National Household Survey. Retrieved April 13, 2018.

[17] City of Richmond. Jobs in Richmond Hot Facts. https://www.richmond.ca/__shared/assets/Jobs6260.pdf Retrieved April 13, 2018.

[18] Vancity: Home Stretch: Comparing housing affordability in B.C.'s hottest markets. https://www.vancity.com/SharedContent/documents/News/Vancity-Report-Housing-affordability-in-BCs-hottest-markets.pdf Retrieved April 6th, 2018

Some of the newest developments in Richmond are not concentrated within the city centre, where many NPOs prefer to be located to best serve residents. An added challenge for NPOs is that businesses are often selected as ideal tenants in larger spaces that could be suitable for NPOs.

THE AMOUNT OF NEW CONSTRUCTION

Neighborhoods experiencing concentrated redevelopment and construction are an indicator of Richmond's growing economy. However, the volume of development can affect and displace NPOs by putting pressure on their existing spaces to be demolished, driving up neighborhood rents and creating indirect challenges, including street closures and shifts in foot traffic.

COMPETITION FOR LAND & HIGH PROPERTY COSTS

According to the V*ancity Housing Affordability Report*, Richmond is ranked in the top ten least affordable markets in BC in all categories of housing.[19] Part of the affordability issue can be attributed to the high demand for land for housing and high associated property costs, which ultimately impacts prices for all space typologies including commercial, institutional, and industrial. NPOs must maneuver within the real estate market in order to serve their communities (who are also facing the same affordability and space availability challenges in their own respect).

FUNDING CONSTRAINTS FOR SPACE

NPOs struggle with cost imbalance issues. These include limited access to financial tools generally available for affordable housing but not available for commercial affordability, lack of negotiating power to deal with unfavorable lease terms, lack of adequate funding to lease or own appropriately sized space, the high cost of necessary improvements (either for the NPO or the property owner), and difficulty in raising credit for space needed (unreasonable terms, insufficient collateral, etc.).

KNOWLEDGE & SKILLS GAPS

NPOs can be disproportionately affected by knowledge or skills gaps in social purpose real estate. NPOs can have greater difficulty adapting to a rapidly changing market, negotiating fair and/ or favorable lease terms, or actively pursuing new real estate opportunities. They can have limited access to relevant networks (loan officers, real estate brokers, equity sources, real estate assistance and consulting etc.). Language barriers on real estate can create another layer of access issues. Finally, NPOs may be challenged to ensure space design that supports their services.

CITY PLANNING

Gaps in City permitting and planning processes whereby NPO space is not considered as a community amenity contribution in the development of key urban areas and buildings can have adverse effects on NPOs. Land-use planning is not necessarily able to influence building design and tenant selection (for example, selecting a large scale established business over a needed NPO). NPOs that wish to re-develop or re-design a building may be challenged by the City's permitting process as it can be timely and costly. Policy amongst various departments can be uncoordinated, resulting in inconsistent support for NPO space in any rezoning, development permit or building permit process.

[19] Vancity. Home Stretch: Comparing housing affordability in B.C.'s hottest markets. https://www.vancity.com/SharedContent/documents/News/Vancity-Report-Housing-affordability-in-BCs-hottest-markets.pdf Retrieved April 6th, 2018

4. RESEARCH METHODS

While the nonprofit sector in Richmond plays an important role in the social and economic fabric of society, there is limited data on the real estate scenarios under which they operate. It is within this context that the Richmond Community Services Advisory Committee launched a comprehensive review of current and emerging real estate factors affecting social purpose NPOs in Richmond. A detailed work plan was developed during the planning phase of the project which determined the purpose, topics and research questions to address and the methodologies that would be used to collect data.

METHODOLOGIES

The methodologies included:

1. A REVIEW OF THE REAL ESTATE MARKET
The availability, suitability, and affordability of real estate is essential for NPO program and service delivery. The review of the real estate market looked at the overall market context and trends in Richmond, with a focus on the demand for and supply of commercial and industrial space. This serves as a benchmark to compare the costs NPOs are currently paying and the availability and suitability of space.

2. A POLICY AND REGULATORY SCAN
A literature review was conducted to understand at a high level local government plans, policies and regulations that guide, inform, regulate and support the nonprofit sector on a variety of real estate, financial, and non-financial matters.

3. DEVELOPMENT OF DATABASE OF NON PROFIT SOCIAL SERVICE ORGANIZATIONS
The team defined, prioritized and developed a list of target social purpose non-profit organizations to consult in the process. RCSAC defined non-profit social purpose organizations as organizations that are voluntary, organized, not-for-profit, self-governing and non-governmental. For the purpose of this project, several sub-sectors of social purpose were specifically excluded, such as business and professional associations, unions, student associations, clubs, committees, task forces, hospitals and health authorities, universities and colleges, municipal libraries and environmental organizations. A variety of different sources were used to compile the database of social purpose non-profit organizations in Richmond including the names and addresses of non-profit organizations listed on the City of Richmond's Community Resources and Services website, organizations obtained from the Richmond Cares Richmond Gives Society, the BC Registry and Canada Revenue Agency (CRA) and a list of organizations that are members of RCSAC. Through this process, it was determined that there were over 344 organizations active in Richmond in 2018, of which over 65 are non-profit social purpose organizations.

4. A SURVEY OF NONPROFIT SOCIAL PURPOSE ORGANIZATIONS
To provide a robust review of NPO commercial and industrial space needs in Richmond that will form a baseline to be tracked and monitored over time, a survey of social purpose nonprofit organizations was developed.

In the lead up to the development of the survey questions, research was undertaken to identify other reports and surveys from comparable markets. There are a few similar studies completed in Canada, including the Social Purpose Real Estate Collaborative's RENT-LEASE-OWN study.[20]

Based on comparable surveys and a high-level real estate market overview, the following topic areas were focused on in the survey (the full list of survey questions can be found in Appendix B Survey Questions):

1. **Organization Profiles** -- The purpose of this topic area was to understand the types of organizations who responded to the survey to provide a richer understanding of the data and to

[20] Real Estate Institute of BC and the Social Purpose Real Estate Collaborative. RENT – LEASE – OWN: Understanding the Real Estate Challenges Affecting the Not-For-Profit, Social Purpose and Cultural Sectors in Metro Vancouver. Retrieved March 28, 2018.

identify the extent to which they represent the social purpose sector as a whole. Information collected comprised of contact information, incorporation status, primary activities, and staff composition.

2. **Current Space & Needs** -- The purpose of this topic area is to understand NPOs current space and needs. Information collected included site locations, current space size, additional space needed, and building components / features needed to be effective in service delivery. Space typology was also obtained to understand space suitability. Typology classifications included retail, office, commercial, institutional, community facilities, light and heavy industrial, and residential/home-based. Specific location data was recorded as it affects a multitude of issues including accessibility for staff, proximity to clients, compatibility of clients with neighbours, and proximity to businesses, services, amenities, and other not-for-profits.
3. **Tenure & Stability** -- The purpose of this topic area is to understand the level of risk NPOs have when it comes to tenure stability or displacement relative to their future space needs, including lease / rental term expiration, confidence in their ability to renew space agreements, and percentage of operating budget directed to space-related costs. Information collected included tenure status, lease / rental agreement expiration timeframes and restrictions, redevelopment potential, and perceived and known security / stability of space. This section also explored NPOs consideration of relocating as a consequence of instability, with questions pertaining to reasons for moving and future space needs.
4. **Affordability** -- Understanding the real estate costs of space for NPOs and how they compare with current market rate costs is essential. Information collected included monthly costs, total cost of base rent per square foot, maximum monthly cost per square foot that an organization would be willing to spend on space-related costs and NPO annual operating costs that go towards lease, rent, mortgage and other building expenditures.
5. **Challenges & Opportunities** -- The purpose of this topic area is to understand the major barriers NPOs face in securing appropriate space and strategies they and their supporters could explore to overcome these real estate challenges.

The survey was designed and administered using Let'sTalkRichmond, an interactive discussion forum and community engagement website run by the City of Richmond where people can give input and feedback on projects. Once the questionnaire was field tested, email invitations were sent to 64 non-profit organizations in the organization database for which email addresses were obtained. The invitations provided NPOs with a link to an online survey and described other options for completing the survey questionnaire, including by telephone with a representative of the team.

The e-mail addresses were obtained through a mixture of secondary sources (e.g. a search of organization websites) as well as by telephoning non-profits for which telephone numbers were available but no email address could be obtained. Out of the 65 NPOs invited to participate in this survey, 39 fully completed the survey (59% completion rate and the respondent may have skipped questions or sections which were not relevant to their organization or for which they did not have data readily accessible).

4. A REVIEW OF RECOMMENDATIONS

Considering findings from the survey results, literature reviews, case studies and stakeholder meetings and conversations, high-level opportunities and strategies to overcome barriers to social purpose real estate were identified for NPOs and their supporters (funders, agencies and government officials).

CHALLENGES AND LIMITATIONS

The major challenges faced in this review and the steps taken to mitigate the impact of these challenges are as follows:

- Timeline. The project was implemented under a very short timeline. The first invitation to the survey was distributed on March 26, 2018 and the fourth and final reminder was sent on April 26, 2018. The survey started somewhat later than anticipated because of a delay in adapting the survey to the TalkRichmond Platform and obtaining relevant approvals.

- No up-to-date list of organizations in the Richmond non-profit sector was available at the start of this phase. A variety of sources were used to compile the database of organizations, including the City of Richmond Community Resources Services list and the RCSAC. To increase the number of non-profit organizations who could be contacted by e-mail, an extensive review of websites was undertaken complemented by telephone calls to NPOs to identify appropriate contact people and contact information.
- The completion rate for the survey varies somewhat across questions. The response rate tends to be lower for the questions that require a breakdown of detailed financial information and open-ended questions. To reflect the level of response, the number of organizations responding to any particular question is included in tables in this report.
- The information shared by respondent NPOs was sensitive and any responses given were requested to be kept confidential, meaning that the City, RCSAC and consultant team will have access to information about who took the survey, but this information will not be made available to the public. This report will not directly associate an organization with their survey responses.

5. REAL ESTATE MARKET OVERVIEW

The availability, suitability, and affordability of real estate is essential for the program and service delivery of NPOs in Richmond. To understand how the real estate situation is unfolding for NPOs, it is important to compare the survey data with the overall real estate context and trends in Richmond and Metro Vancouver.

OFFICE SPACE

The results from the Richmond NPO Space Needs survey indicated that most NPOs occupy office space for their primary space (79%). As such, this study compares the availability (vacancy rate and square footage) and affordability (cost per square foot) of the Richmond and Metro Vancouver office real estate market to provide a baseline of information on the real estate situation faced by NPOs.

While Richmond has the third highest total office space supply in Metro Vancouver (8.4%), Richmond's vacancy declined to 5.4% in the first quarter of 2018 from 8.7% a year earlier - and is at its lowest point since mid-year 2002.[21] This trend indicates that office space vacancy rates may remain low for NPOs looking for new or additional office space in 2019.

OFFICE SPACE SUPPLY

The supply or availability of inventory is an important driving factor of NPO space needs. Further, the availability of Class types is important as the more affordable office spaces typically range in the lower end (Class C and B). Office classifications can be defined as follows[22]:

- Class A Office Space: Prestigious buildings competing for premier office users with rents above average for the area.
- Class AAA Office Space: A subset of Class A buildings which are locally recognized as being the top tier, most prestigious buildings that command the highest rental rates.
- Class B Office Space: Buildings competing for a wide range of users with rents in the average range for the area. Building finishes are fair to good for the area and systems are adequate.
- Class C Office Space: Buildings competing for tenants requiring functional space at rents below the average for the area.

Metro Vancouver has 63.967 million square feet of office inventory and 4.8 million square feet (8.4%) is located within Richmond. Metro Vancouver has 3.709 million square feet of vacant office space and over 259,067 of that is located within the City of Richmond. For Metro Vancouver as a whole, the majority of vacant office space is Class A and Class B.

Richmond has the second lowest average net rental rate at $18.37 per square foot in Metro Vancouver. Class A space is offered at net $19.47 per square foot in Richmond (second lowest), Class B space is offered at net $14.46 per square feet in Richmond (lowest), and Class C is offered at net $14.00 per square foot (third lowest)). Nevertheless, rental rates have steadily increased over the past five years. In 2013, the net rental rate was $14.30 per square foot which has since increased to $18.37 per square foot in 2018.[23] The limited availability of office space and the increasing cost of office space creates difficulties for new, emerging or relocating NPOs competing with other organizations and businesses to find and secure affordable and appropriate office space.

The Richmond office market remains stable with moderate positive absorption for the sixth straight quarter.[24] Much of this was driven by existing tenant expansion. Table 1.1 illustrates Richmond's office

[21] Avison Young. 2017 Year End Office Market Report Metro Vancouver, BC. http://www.avisonyoung.ca/documents/95750/1691318/Avison+Young+Office+Market+Report_2017+Year+End.pdf Retrieved April 13, 2018

[22] Colliers International, Research & Forecast Report Metro Vancouver Office Market, First Quarter 2018. Retrieved May 16, 2018.

[23] Colliers International, Research & Forecast Report Metro Vancouver Office Market, First Quarter 2018. Retrieved May 16, 2018.

[24] Colliers International, Research & Forecast Report Metro Vancouver Office Market, First Quarter 2018. Retrieved May 16, 2018.

space inventory in the first quarter of 2018 and how Richmond's office space supply compares with other Metro Vancouver municipalities.

Table 1.1 Office Supply Inventory in Metro Vancouver

Concentration of Office Space Inventory in Metro Vancouver [Square Footage]						
	Class C	Class B	Class A	Class AAA	Total Office Inventory by Municipality	% of Total Office Inventory by Municipality
Burnaby	650,362	3,292,211	7,350,318	-	11,292,891	18%
Langley	278,589	334,568	825,436	-	1,438,593	2%
New Westminster	512,159	823,029	645,966	-	1,981,154	3%
North Shore	287,834	1,363,305	909,015	-	2,560,154	4%
Richmond	**405,318**	**1,999,140**	**2,397,279**	-	**4,801,737**	**8%**
Surrey	1,015,157	1,629,386	1,550,605	1,098,230	5,293,378	8%
Vancouver Proper Total	7,067,571	15,725,096	10,884,327	2,923,058	36,600,052	57%
Metro Vancouver Total by Class Type	10,216,990	25,166,735	24,562,946	4,021,288	63,967,959	100%

OFFICE SPACE VACANCY

As illustrated in Table 1.2, the City of Richmond is experiencing low vacancy rates for Class B and Class C space, at 4.6% and 0.4% respectively, and at 7% of total Metro Vancouver vacancy across all Class types, in the first quarter of 2018. The limited availability of office space in Richmond creates difficulties for new, emerging or relocating NPOs competing to secure appropriate office space.

Table 1.2: Office Supply Vacancy in Metro Vancouver

Concentration of Office Space Vacancy in Metro Vancouver [Square Footage]						
	Class C	Class B	Class A	Class AAA	Total Office Vacancy by Municipality	% of Total Office Vacancy by Municipality
Burnaby	39,352	200,031	543,682		783,065	22%
Langley	12,605	17,670	39,700		69,975	2%
New Westminster	11,254	48,347	152,898		137,607	4%
North Shore	2,349	39,258	96,000		137,607	4%
Richmond	**1,440**	**91,356**	**166,271**		**259,067**	**7%**
Surrey	26,287	133,218	80,673	88,904	329,082	9%
Vancouver Proper Total	321,406	570,686	758,762	273,929	1,924,783	53%
Metro Vancouver Total Vacancy by Class Type	414,693	1,100,566	1,837,986	362,833	3,641,186	100%
Vacancy Rate by Class Type	4.1%	4.4%	7.5%	9.0%	5.7%	

OFFICE SPACE MARKET RATES

Richmond has the second lowest weighted average asking net rental rate at $18.37 per square foot in the Metro Vancouver region, as illustrated in Table 1.3. For Metro Vancouver as a whole, Class A office space

ranges from $19.47 per square foot in Richmond (second lowest), to $23.55 per square foot on the North Shore (about average), to $33.85 in Vancouver proper (highest). Class B office space ranges from $14.46 per square feet in Richmond (lowest), to $20.08 per square foot on the North Shore (about average), to $27.49 per square foot in Vancouver Proper (highest). Class C office space ranges from $12.90 per square foot in Langley, to $14.00 per square foot in Richmond as the third lowest, to $17.00 per square foot on the North Shore (about average) and $21.98 per square foot in Vancouver Proper (highest).

Table 1.3: Office Supply Net Market Rates in Metro Vancouver

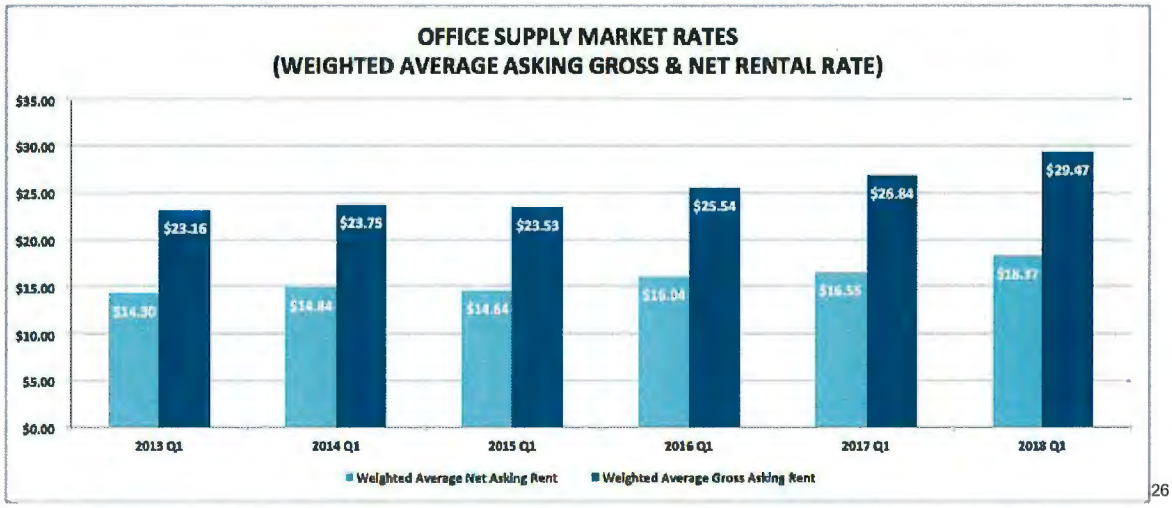
Office Supply Market Rates in Metro: Weighted Average Asking Net Rental Rates (measured by dollar per square foot per year [$/SF], where $ = Annual Base Rent, and SF= the area that the organization occupies and uses as defined by rental/lease agreement).					
	Class C	Class B	Class A	Class AAA	Average Market Rate by Municipality
Burnaby	$13.04	$18.26	$25.05	-	$22.25
Langley	$12.90	$16.58	$19.17	-	$17.36
New Westminster	$16.68	$17.58	$25.77	-	$20.77
North Shore	$17.00	$20.23	$23.55	-	$21.09
Richmond	**$14.00**	**$14.38**	**$19.47**	-	**$18.37**
Surrey	$16.55	$20.86	$23.44	$31.10	$24.03
Vancouver Proper Total	$21.98	$30.59	$33.85	$44.61	$32.64
Average Rate by Class Type	$16.02	$19.78	$24.33	$37.86	$22.36

Table 1.4 illustrates Richmond's office supply weighted average asking gross rental rates in the first quarter of 2018.

Table 1.4: Office Supply Gross Rental Market Rates in Metro Vancouver

Office Supply Market Rates in Metro: Weighted Average Asking GROSS Rental Rates (measured by dollar per square foot per year [$/SF], where $ = Annual Gross Rent, and SF= the area that the organization occupies and uses as defined by rental/lease agreement).					
	Class C	Class B	Class A	Class AAA	Average Market Rate by Municipality
Burnaby	$22.99	$32.18	$40.57	-	$36.97
Langley	$20.88	$25.06	$29.57	-	$26.94
New Westminster	$30.70	$30.73	$39.59	-	$34.33
North Shore	$26.98	$35.01	$37.80	-	$35.59
Richmond	**$28.50**	**$25.27**	**$30.59**	-	**$29.47**
Surrey	$26.76	$34.17	$29.92	$46.68	$34.53
Vancouver Proper Total	$39.21	$50.59	$52.10	$66.46	$51.79
Average Rate by Class Type	$28.00	$33.29	$37.16	$56.57	$35.66

While the City of Richmond has had low weighted average asking gross and net rental rates, they have steadily increased over the past five years. As illustrated in the graph below, in 2013, the net rental rate was $14.30 per square foot which has since increased to $18.37 per square foot in 2018.[25]



[26]

Weighted Average Asking Net Rental Rates (measured by dollar per square foot per year [$/SF], where $ = Annual Base Rent, and SF= the area that the organization occupies and uses as defined by rental/lease agreement)
Additional Rent: All monetary obligations of Tenant to Landlord under the terms of this Lease, including, but not limited to, Base Rent, Tenant's Monthly Operating Expense Payment, Tenant's Percentage Share of Insurance Costs and Real Property Taxes

OFFICE SPACE DEMAND

Demand for office space in the City of Richmond is a function of many factors including macroeconomic trends (the national and international economic climate); growth and policies of the City of Richmond; cost of space; availability and character of developments; and, importantly, the overall "package" that Richmond presents to prospective users.

Demand for office space emanates from several key sources:

- Education and universities: Kwantlen Polytechnic University is in the process of expanding its Richmond campus that will create further class, studio and office space.
- Health-care and medical: The Richmond Hospital and many medical, dental and counselling clinics are housed in Richmond or require new commercial space in Richmond.
- Non-profit organizations: There are hundreds of non-profit organizations located in Richmond, with the majority requiring office space to run their programs and services.
- Research and technology: Richmond is home to 12 of the 100 top high-tech companies in BC, a list prepared annually by Business in Vancouver.[27]
- Professional: There is high office space demand from legal, accounting, real estate, engineering, architecture, advertising, marketing, consulting and other professional service providers.
- Business and financial services: There is high office space demand from professional services related to the financial sector (consumer banking, etc).
- Sales and service occupations
- Natural and applied sciences and related occupations
- Government services
- Occupations in art, culture, recreation and sport

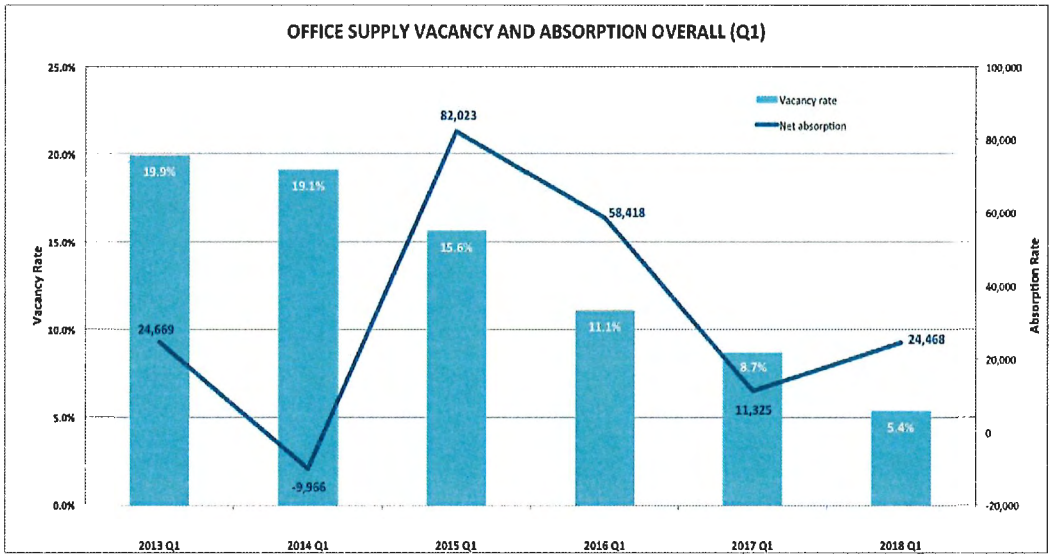
OFFICE SPACE MARKET SUMMARY

[25] Colliers International, Research & Forecast Report Metro Vancouver Office Market, First Quarter 2018. Retrieved May 16, 2018.

[26] Colliers International, Research & Forecast Report Metro Vancouver Office Market, First Quarter 2018. Retrieved May 16, 2018.

[27] City of Richmond. Biggest High-Tech Companies in Richmond. https://www.richmond.ca/__shared/assets/pp_hf_246258.pdf. Retrieved April 13, 2018.

Richmond has the third highest office space supply in Metro Vancouver, at 5.4 million square feet of office space or 8.4% of total office supply in Metro Vancouver. Richmond's vacancy declined to 5.4% in the first quarter of 2018 from 8.7% a year earlier and is at its lowest point since mid-year 2002, as illustrated in the graph below.[28] The main reasons for the decrease were due to the completion of new developments in 2017, which resulted in space being occupied towards the end of 2017. Most of the absorption recorded in 2017 was from tenants who relocated within the market. Despite the decline in vacancy, large blocks of space remain available at Airport Executive Park and Crestwood Corporate Centre, both located on East Cambie Road.



Absorption rate: Net absorption is a measurement of the net change of the supply of space in a given real estate market over a specific period of time, measured in square feet. [29]

New office space for lease in Richmond is scheduled for completion by the end of 2020. Yuanheng Holdings' three phase mixed-use ViewStar development will include a 205,141 square foot office tower in its second phase. iFortune Homes' is waiting for the issuance of its development permit for its mixed-use project, the iFortune Centre, which includes an 105,420 square foot office tower at 6860 No. 3 Road. New projects from Bene (No. 3) Road Development, New Continental Properties Inc. and Beckwith Development are expected to add another 240,000 square feet of office space in the coming years.[30] However, the resulting Class A office space will lease for rates beyond the reach of many NPOs.

The supply of new office space, below average rents (relative to other municipalities), proximity to rapid transit and other quality of life amenities in Richmond make it attractive to organizations to locate in Richmond, but the cost and competition for space make it difficult for NPOs to find suitable space.

INDUSTRIAL SPACE

The results from the Richmond NPO Space Needs Survey indicate that a small number of NPOs in the study occupy industrial space (3%). As such, this study compares the availability (vacancy rate and square

[28] Avison Young. 2017 Year End Office Market Report Metro Vancouver, BC. http://www.avisonyoung.ca/documents/95750/1691318/Avison+Young+Office+Market+Report_2017+Year+End.pdf Retrieved April 13, 2018

[29] Colliers International, Research & Forecast Report Metro Vancouver Office Market, First Quarter 2018. Retrieved May 16, 2018.

[30] Avison Young. 2017 Year End Office Market Report Metro Vancouver, BC. http://www.avisonyoung.ca/documents/95750/1691318/Avison+Young+Office+Market+Report_2017+Year+End.pdf Retrieved April 13, 2018

footage), and affordability (cost per square foot) of the Richmond and Metro Vancouver industrial real estate market to form a baseline for the real estate situation faced by some NPOs.[31]

Richmond has the second highest inventory of industrial space, with 24.2% of the total supply in Metro Vancouver. Vacancy in Richmond went to 2.0% in the first quarter of 2018, down from 2.7% in the first quarter of 2016. This is a slightly above average industrial space vacancy rate (1.8%) relative to other municipalities in Metro Vancouver. Richmond has lower than average net rental rates for industrial space but pricing has and is anticipated to rise with increasing demand. The limited availability and increasing costs of industrial space creates difficulties for new, emerging or relocating NPOs competing with businesses and other organizations to secure affordable and appropriate space.

INDUSTRIAL SPACE SUPPLY

Metro Vancouver has 144.174 million square feet of industrial inventory, of which 34.6 million square feet (24%) is located within the the City of Richmond, as illustrated in Table 1.5.

Table 1.5 Industrial Supply Inventory in Metro Vancouver

Concentration of Industrial Space Inventory in Metro Vancouver [Square Footage]		
	Total Industrial Inventory by Municipality	% of Total Industrial Inventory by Municipality Across the Region
Burnaby	26,232,257	18.2%
Langley	19,388,367	13.4%
North Shore	4,734,111	3.3%
New Westminster	3,499,038	2.4%
Richmond	**34,630,155**	**24.0%**
Surrey	35,350,606	24.5%
Vancouver Proper Total	20,339,497	14.1%
Metro Vancouver Total	144,174,031	100%

INDUSTRIAL SPACE VACANCY

Metro Vancouver has 2.685 million square feet of vacant industrial space, of which 695,103 square feet (22.7%) of regional vacant space is located within the City of Richmond, as illustrated in Table 1.6. Richmond is experiencing a low industrial space vacancy rate (2.0%) but higher than other municipalities in the region; which may put some pressure on landlords to ask lower rental rates in Richmond compared to other municipalities.

[31] Colliers International, Research & Forecast Report Metro Vancouver Industrial Market, First Quarter 2018. Retrieved May 16, 2018.

Table 1.6: Industrial Supply Vacancy in Metro Vancouver[32]

Concentration of Industrial Space Vacancy in Metro Vancouver [Square Footage]			
	Total Industrial Vacancy by Municipality	% of Total Industrial Vacancy by Municipality Across Region	Vacancy Rate (%)
Burnaby	440,183	32.6%	1.7%
Langley	279,633	11.7%	1.4%
North Shore	43,434	1.7%	0.9%
New Westminster	0	0.0%	0.0%
Richmond	**695,103**	**22.7%**	**2.0%**
Surrey	269,901	16.3%	0.8%
Vancouver Proper Total	452,142	14.3%	2.2%
Metro Vancouver Total Vacancy	2,685,234	100.0%	1.5%

INDUSTRIAL SPACE MARKET RATES

The City of Richmond has the third lowest average asking rental rate at $8.87 per square foot in the Metro Vancouver region. For Metro Vancouver as a whole, industrial space ranges from $6.75 per square foot in New Westminster (lowest), to $8.87 per square foot in Richmond (third lowest), to $11.45 per square foot in Burnaby (about average) and $17.09 per square foot in Vancouver Proper (highest).[33]

Table 1.7: Industrial Supply Market Rates in Metro Vancouver[34]

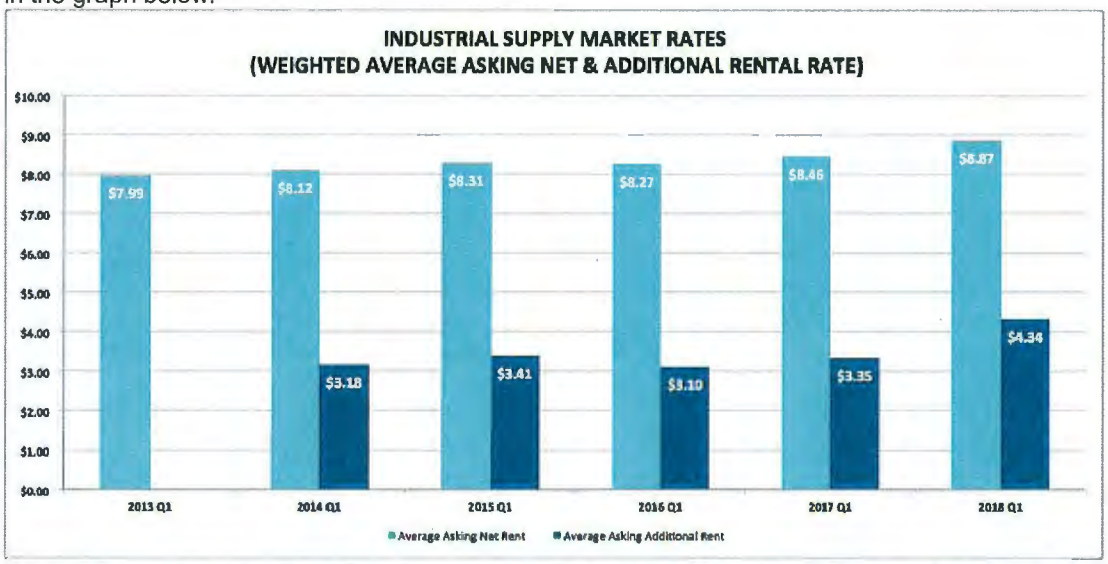
Industrial Supply Market Rates in Metro: Weighted Average Asking Net Rental Rates (measured by dollar per square foot per year [$/SF], where $ = Annual Base Rent, and SF= the area that the organization occupies and uses as defined by rental/lease agreement).	
Weighted Average Asking Rent by Municipality	
Burnaby	$11.43
Langley	$11.65
North Shore	$16.30
New Westminster	$6.75 (previous quarter)
Richmond	**$8.87**
Surrey	$8.42
Vancouver Proper Total	$17.09
Average Market Rate	$11.10

[32] Colliers International, Research & Forecast Report Metro Vancouver Industrial Market, First Quarter 2018. Retrieved May 16, 2018.

[33] Colliers International, Research & Forecast Report Metro Vancouver Industrial Market, First Quarter 2018. Retrieved May 16, 2018.

[34] Colliers International, Research & Forecast Report Metro Vancouver Industrial Market, First Quarter 2018. Retrieved May 16, 2018.

While the City of Richmond has had low weighted average asking net rental rates, they have increased over the past five years from $7.99 per square foot in 2013 to $8.87 per square foot in 2018, as illustrated in the graph below.[35]



Weighted Average Asking Net Rental Rates (measured by dollar per square foot per year [$/SF], where $ = Annual Base Rent, and SF= the area that the organization occupies and uses as defined by rental/lease agreement) [36]
Additional Rent: All monetary obligations of Tenant to Landlord under the terms of this Lease, including, but not limited to, Base Rent, Tenant's Monthly Operating Expense Payment, Tenant's Percentage Share of Insurance Costs and Real Property Taxes

INDUSTRIAL SPACE DEMAND

Demand for industrial space in Richmond is a function of many factors including macroeconomic trends; local economic growth; policies; cost of space; availability and character of developments; and the overall "package" that Richmond presents to prospective users.

In 2017, more than 3.1 million square feet of new industrial space has been proposed or is under construction to be completed by 2020.[37] Demand for this industrial space emanates from several sources:

- Trades, transport and equipment operators and related occupations
- Manufacturing and utilities
- Natural resources, agriculture and related production
- Storage and distribution spaces
- Flex industrial and office space
- Research and technology: Richmond is home to 12 of the 100 top high-tech companies in BC, a list prepared annually by Business in Vancouver, many of whom require industrial warehouse and manufacturing space.[38]

INDUSTRIAL SPACE MARKET SUMMARY

Richmond has the second highest inventory of industrial space, with 34.630 million square feet of industrial space or 24.2% of the total supply in Metro Vancouver. Vacancy in Richmond's 34.6 million square foot industrial market went to 2.0% in the first quarter of 2018 from 2.0% in the first quarter of 2017 and 2.7% a

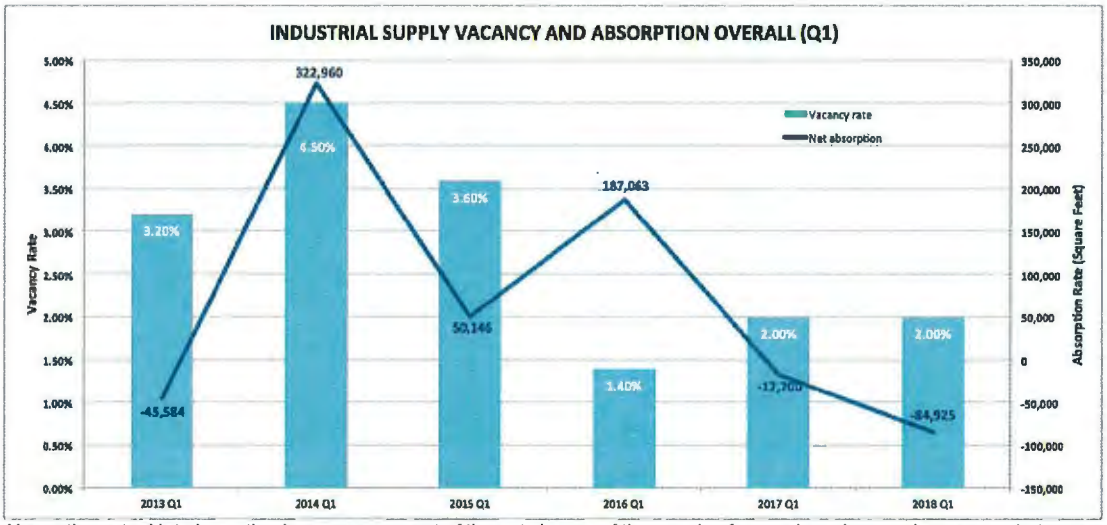
[35] Colliers International, Research & Forecast Report Metro Vancouver Industrial Market, First Quarter 2018. Retrieved May 16, 2018.

[36] Colliers International, Research & Forecast Report Metro Vancouver Industrial Market, First Quarter 2018. Retrieved May 16, 2018.

[37] Avison Young. Spring 2017 Richmond / Delta Industrial Report.http://www.avisonyoung.com/documents/20342/570840/Vancouver_RichmondDeltaIndustrialReport_Spring2017.pdf/ceb6404e-af92-4a3a-a795-bc963c5ac894?t=-1998248972. Retrieved April 13, 2018

[38] City of Richmond. Biggest High-Tech Companies in Richmond. https://www.richmond.ca/__shared/assets/pp_hf_246258.pdf. Retrieved April 13, 2018.

year earlier, due to strong leasing activity and limited new construction.[39] This is a slightly above average industrial space vacancy rate (1.8%) relative to other municipalities in Metro Vancouver. Richmond does have lower than average asking net rental rates for industrial space but pricing has and is anticipated to rise as new supply for lease may be unable to keep up with demand and have a negligible impact on vacancy in the future. Lease or purchase options in all size ranges remain highly limited. Industrial strata development has become more prevalent in Richmond due to strong demand from owner-occupiers and the ability to make strata pricing work to accommodate the rising cost of acquiring increasingly rare industrial land.[40]



Absorption rate: Net absorption is a measurement of the net change of the supply of space in a given real estate market over a specific period of time, measured in square feet. [41]

Ongoing demand for industrial space in Richmond has fuelled increases in purchase prices and rental rates as limited supply and land available for development, and tight vacancy has shifted the market. The higher industrial space inventory, low vacancy and below average rents (relative to other municipalities in the region) in Richmond is a positive for NPOs seeking space. However, NPOs still face the challenge of finding affordable space, according to their operating budgets.

[39] Avison Young. Spring 2017 Richmond / Delta Industrial Report.http://www.avisonyoung.com/documents/20342/570840/Vancouver_RichmondDeltaIndustrialReport_Spring2017.pdf/ceb6404e-af92-4a3a-a795-bc963c5ac894?t=-1998248972. Retrieved April 13, 2018

[40] Avison Young. Spring 2017 Richmond / Delta Industrial Report.http://www.avisonyoung.com/documents/20342/570840/Vancouver_RichmondDeltaIndustrialReport_Spring2017.pdf/ceb6404e-af92-4a3a-a795-bc963c5ac894?t=-1998248972. Retrieved April 13, 2018

[41] Colliers International, Research & Forecast Report Metro Vancouver Industrial Market, First Quarter 2018. Retrieved May 16, 2018.

6. POLICY AND REGULATORY SCAN

Metro Vancouver municipalities have introduced plans and policies that foster and support the not-for- profit sector in a variety of real estate, financial, and non-financial means. This section briefly describes a scan of local policies, regulations and approaches to provide a local backdrop for the survey results.

The City of Richmond has many plans and policies that address the real estate needs of NPOs, including the Richmond Official Community Plan, the City of Richmond's Social Development Strategy, the Zoning Bylaw, the Property Tax Exemption Policy, City Grant Programs and the provision of City-owned land and property. Most plans focus on the space and funding needs of NPOs that provide child care, family support, housing and health services. The space needs of more general social purpose NPOs are often not considered in area plans and rezonings and in the development of key areas like Richmond City Centre. There is an opportunity to expand plans and programs to address the space needs of all social purpose NPOs in Richmond and to ensure NPO program and administrative space needs are amenities considered in the development of the city centre.

SOCIAL DEVELOPMENT PLANS

Some municipalities have developed plans that support the social sector of their community. Typically, these plans are part of a broader social or cultural plan and often present a set of goals or directions towards a segment of the nonprofit sector, such as child care or arts and culture, and facilitate the development of detailed policies and regulations. Few plans specifically address the space needs of the nonprofit sector. Despite this, these plans provide a framework by which other policy and regulatory decisions can be made, including decisions to support the space needs of the nonprofit sector.[42]

- The City of Richmond's Social Development Strategy outlines a vision, goals, strategic directions and actions to improve opportunities for social development in Richmond. The City strategy articulates key community needs that will require a variety of spaces, and strategies to improve opportunities for community service space development, operation, and maintenance.[43]

Social Development Strategy Framework

[42] Social Purpose Real Estate: RENT – LEASE – OWN: Understanding the Real Estate Challenges Affecting the Not-For-Profit, Social Purpose and Cultural Sectors in Metro Vancouver, 2013

[43] Building Our Social Future – A Social Development Strategy for Richmond 2013- 2022, 2013

DEVELOPMENT PLANS & REGULATIONS

Zoning and development bylaws define and regulate the types of uses permitted in different zoning districts. The availability of and access to commercial, industrial or other program space for NPOs can be facilitated by zoning and other regulations.

- The Richmond City Centre Area Plan (2009) is a land use plan that outlines objectives and strategic directions that pertain to community services. Section 2.8, 'Social Equity and Community Services' sets an objective for creating an 'inclusive community', outlining how access to services will be facilitated by locating complementary services with, adjacent to or nearby existing and future City Centre public facilities; and by establishing "Community Service Hubs", multi-use, multi-agency community service "hubs" in each of the City Centre's six village centres, so NPOs can be located close to the communities they serve and offer a variety and continuum of services.
- Richmond Official Community Plan (City of Richmond, 2012) is a city-wide plan that outlines objectives and strategic directions that pertain to social purpose real estate. In Chapter 11, Social Inclusion and Accessibility, Objective 2 is to facilitate the provision of space for community agencies and includes policies to assist community groups in securing office and program space and funding (e.g., through senior governments, NGOs, the lease of any surplus City space, negotiation with developers in the rezoning process); to establish clear, transparent guidelines for the securing and allocating of City-owned or negotiated community agency space (e.g., eligibility criteria, cost factors, timing, roles and responsibilities); and to support community partners to develop and maintain an inventory of space for community agencies in Richmond.
- The City of Richmond's Social Development Strategy outlines opportunities to negotiate space for family-oriented community service hubs through rezoning (e.g. co-location of child care, family support and health services).[44]
- The City of Richmond's Zoning Bylaw defines and regulates what uses can go in each zoning district and allows minor community care facilities and childcare uses in residential districts.
- The City of Vancouver's Zoning and Development Bylaw allows a variety of social, cultural, or recreational uses in residential districts on a conditional basis. For example, in Mount Pleasant, the RM-4, RT-5, and RT-6 residential zones conditionally permit "Cultural and Recreational" uses. In RT-6 and RM-4 districts, for example, clubs are allowed provided that no commercial activities are carried on and the use does not adversely impact residential uses. The Mount Pleasant Neighbourhood House is located in an RT-5 zone and two Boys and Girls clubs are located in residential zones.[45]

COMMUNITY AMENITY CONTRIBUTIONS OR DENSITY BONUSING POLICIES

Community amenity contributions or density bonusing are policies or practices that can support NPO access to space. As part of major projects that involve rezonings, many municipalities require or negotiate a community benefit contribution in return for the increase in land value that the developer gains from the rezoning. Community amenities may include public art, community centres, parks, affordable housing or other facilities that benefit a neighbourhood. When spaces are made available through a major re-zoning for an NPO purpose, these facilities are leased to not-for-profit operators at below-market or nominal rents.[46]

- The City of Richmond's Child Care Development Policy describes how developer cash contributions and child care density bonus contributions from major project rezonings can be allocated to the City's Child Care Reserve Funds: 90% of the amount is deposited to a capital development reserve fund and 10% is deposited to an operating reserve fund, which provides financial assistance for non-capital

[44] Building Our Social Future – A Social Development Strategy for Richmond 2013- 2022, 2013. Retrieved April 20, 2018.

[45] City of Vancouver Zoning & Development. Bylaw No. 3575. http://vancouver.ca/your-government/Zoning-development-bylaw.aspx. Retrieved April 19, 2018.

[46] Social Purpose Real Estate: RENT – LEASE – OWN: Understanding the Real Estate Challenges Affecting the Not-For-Profit, Social Purpose and Cultural Sectors in Metro Vancouver, 2013. Retrieved April 20, 2018.

expenses related to childcare within the City. These reserve funds assist with establishing childcare facilities and spaces in private or public developments and in acquiring sites for lease.[47]

- The City of Burnaby's Community Benefit Bonus Policy and rezoning process for major developments can help secure community amenity contributions from developers. Contributions can include office space that is leased or otherwise allocated to NPOs. Cash contributions can be allocated to the City's Housing Fund to be used toward City-initiated or community-sponsored affordable housing projects which are generally used to off-set City-related costs such as application and permit fees, development cost charges and off-site servicing requirements.[48]

PROPERTY TAX EXEMPTIONS

Municipalities can offer property tax exemptions to NPOs that own property in a variety of ways.

- The City of Richmond's Property Tax Exemption Policy allows the City to provide property tax exemptions to churches, private schools, hospitals, and charities that own property. Charitable property tax exemption is also allowed for properties where an NPO is using a municipal building as a licensee or tenant.[49]
- The City of Coquitlam's Community Charter section 224 allows the City to provide property tax exemptions to local organizations that enhance the wellbeing of the community. Exemptions are considered for a period of up to five years for certain types of land and which are understood to provide some general benefit to residents of Coquitlam.[50]

MUNICIPAL GRANT PROGRAMS

Some municipalities offer grant programs to NPOs that provide funding for a range of purposes, including for annual operations, organizational development and training or projects.

- The City of Richmond's Grant Programs aim to assist Richmond-based community groups in providing programs to residents, in building community and organizational capacity, and in promoting partnerships and financial cost sharing. Groups can now receive grants in the program areas of child care; health, social and safety; parks, recreation, and community events; and arts and culture.[51]
- The City of North Vancouver provides annual grants to NPOs that deliver a range of community social and cultural services to residents. Specifically, grants are provided for community services, outreach youth services, arts assistance, children and youth initiatives and core funding (general operating expenses and/or specific services).[52]
- The City of Coquitlam provides annual grants to NPOs to help fulfill the City's strategic goals. The grant programs include an active grant category ($5,000) for sport and active recreation services for children and youth, and the Spirit of Coquitlam grant, which assists community organizations to work collaboratively and to combine their efforts and resources.[53]
- The City of Port Coquitlam's "Self-Help Matching Grant Program" supports projects that involve new construction, renovation or expansion of community facilities or spaces such as sports fields, parks, environmental habitat, community recreation, indoor sports area, arts/culture and streetscapes. Since

[47] City of Richmond Bylaw 8877. https://www.richmond.ca/__shared/assets/Bylaw_8877_CNCL_5-14-201232920.pdf. Retrieved April 20, 2018.

[48] City of Burnaby Community Benefit Policy can be found at http://www.burnaby.ca/Assets/city+services/planning/Community+Benefit+Bonus+Policy.pdf. Retrieved April 26, 2018.

[49] City of Richmond. Building Our Social Future – A Social Development Strategy for Richmond 2013-2022, 2013. Retrieved April 20 2018.

[50] The City of Coquitlam. Property tax exemption. https://www.coquitlam.ca/city-services/taxes-utilities/property-taxes/property-taxes.aspx. Retrieved May 24, 2018.

[51] City of Richmond. Grant Program. https://www.richmond.ca/plandev/socialplan/citygrant.htm. Retrieved May 24, 2018.

[52] City of North Vancouver. Community Grant program. http://www.cnv.org/city-services/planning-and-policies/grants-and-funding/community-grants Retrieved May 24, 2018.

[53] The City of Coquitlam. Community Grants. Available https://www.coquitlam.ca/parks-recreation-and-culture/community-grants Retrieved May 24, 2018.

its launch in 2002, the Program has provided matching funds for community projects such as audio-visual theatre equipment, playgrounds, building upgrades and specialized equipment.[54]

MUNICIPAL FACILITIES & PROPERTIES

A common way of supporting NPOs is by making public facilities such as community centres, schools and other civic facilities and properties available to groups for free or rent/leased at nominal or reduced rental rates.[55] Few municipalities have written policies on the selling and leasing of municipal properties to NPOs; however, there are examples of municipalities leasing city-owned properties to NPOs as this is one of the most direct methods of assisting NPOs with their space needs.[56]

- The City of Richmond has also planned and developed many City-owned child care facilities for lease at nominal rates to not-for-profit service providers.
- "Richmond Caring Place" is a commercial building situated on centrally located City-owned land and leased to the Caring Place Society at a nominal rental rate.[57] Richmond Caring Place is a community hub leased and operated by the Caring Place Society for the benefit of renting to other non-profit agencies. The community hub model has proven to be an effective solution for agencies to deliver services in a convenient one-stop location.[58]
- The City of Burnaby owns two buildings that serve as community resource centres. These centres are leased to NPOs which provide services and programs primarily intended for Burnaby residents. Through a lease grant program, agencies are eligible for significant reductions in rent. For example, the City leased Burnaby Heights School as a resource centre between 1990 and 2009.[59]
- The District of North Vancouver leases community facilities on an ongoing basis to societies or groups that provide social, cultural, educational, and recreational benefits. Community facility leases have a maximum term of five years at a fee of $1.00 per annum.[60]

[54] The City of Port Coquitlam. Self-Help Matching Program. https://www.portcoquitlam.ca/recreation/administration/self-help-matching-grant-program/ Retrieved May 24, 2018.

[55] Social Purpose Real Estate: RENT – LEASE – OWN: Understanding the Real Estate Challenges Affecting the Not-For-Profit, Social Purpose and Cultural Sectors in Metro Vancouver, 2013. Retrieved April 20 2018.

[56] Social Purpose Real Estate: RENT – LEASE – OWN: Understanding the Real Estate Challenges Affecting the Not-For-Profit, Social Purpose and Cultural Sectors in Metro Vancouver, 2013. Retrieved April 20 2018.

[57] City of Richmond's Development of City-owned Child Care Facilities. https://www.richmond.ca/__shared/assets/PoliciesandProceduresforCity-ownedchildcarefacilities45413.pdf. Retrieved May 24, 2018

[58] Building Our Social Future – A Social Development Strategy for Richmond 2013- 2022, 2013. Retrieved April 20 2018.

[59] City of Burnaby's Lease Grants. https://www.burnaby.ca/Assets/city+services/planning/Lease+Grant+Guidelines.pdf. Retrieved May 24, 2018

[60] City of North Vancouver's Community Facility Leases. app.dnv.org/OpenDocument/Default.aspx?docNum=2611238. Retrieved May 24, 2018

7. SURVEY FINDINGS

From March to April 2018, the Richmond NPO Space Needs Review Survey was designed and deployed using the Let'sTalkRichmond platform to gather input and ideas from Richmond's social purpose organizations on their space needs, challenges and opportunities. The survey was designed as convenience-based ("opt-in") with a blend of open and closed ended questions.

A total of 39 social purpose non-profit organizations completed the survey and over 16 pages worth of cross-tabulation data and over 110 open-ended comments were captured and 'coded' during analysis.

Based on a number of comparable surveys and a high-level real estate market overview, the following topic areas were focused on in the survey (the full list of survey questions can be found in Appendix B: Survey Questions).

1. Organization Profiles
2. Current Space and Needs
3. Tenure and Stability
4. Affordability
5. Challenges and Opportunities

All input gathered was analyzed. Where applicable, open-ended responses were read and assigned a 'code' or a theme to allow for grouping of similar ideas. Answers that were off-topic, vulgar or illegible were given a code of "Other" and not included in the results.

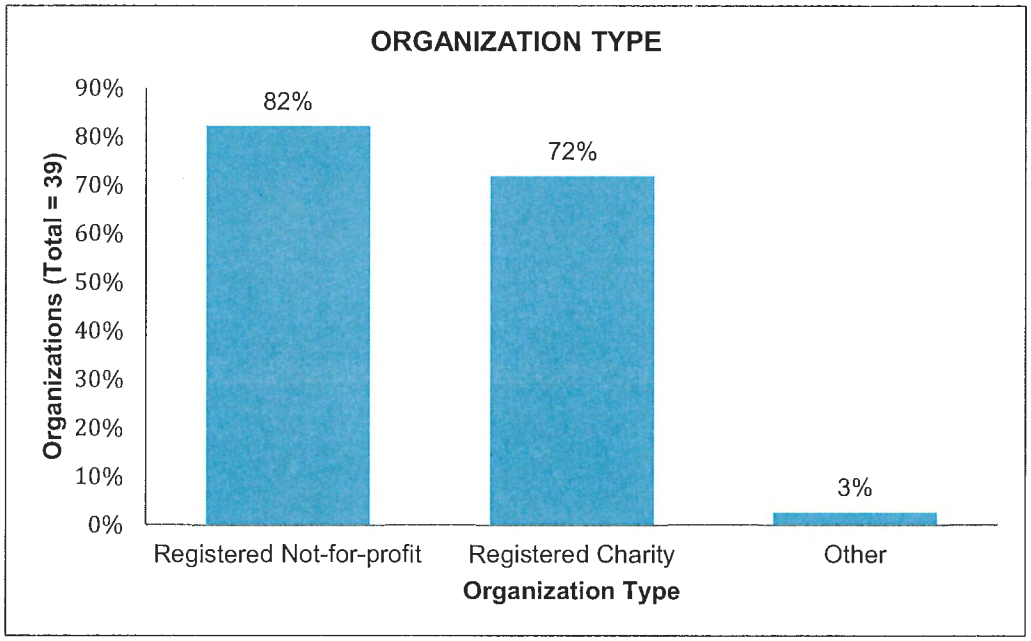
7.1 ORGANIZATION PROFILES

A key objective of the survey was to better understand social purpose NPOs in Richmond. Highlights from the survey findings show that respondents are both registered not-for-profits and charities that serve a diversity of populations in Richmond that live and/or commute to their programs and services from across the city. 49% of all respondent NPOs serve between 1000-5000+ community members. To serve these populations, the majority of respondents have 11-20 full-time employees (22%), part-time employees (14%) and volunteers (19%) per week while others have 21 to 100 full-time employees (12%) and 51 to 100 volunteers (14%). With almost 80% of NPO staff working on site, most NPOs projected that they will continue to increase all worker types in the future to accommodate growing program and service needs. This means that NPOs will need significant commercial and industrial space in Richmond in the future to accommodate growing programs, services and personnel.

ORGANIZATION STATUS

Highlights from the responses to Q: What type of organization do you have? Check all that apply.

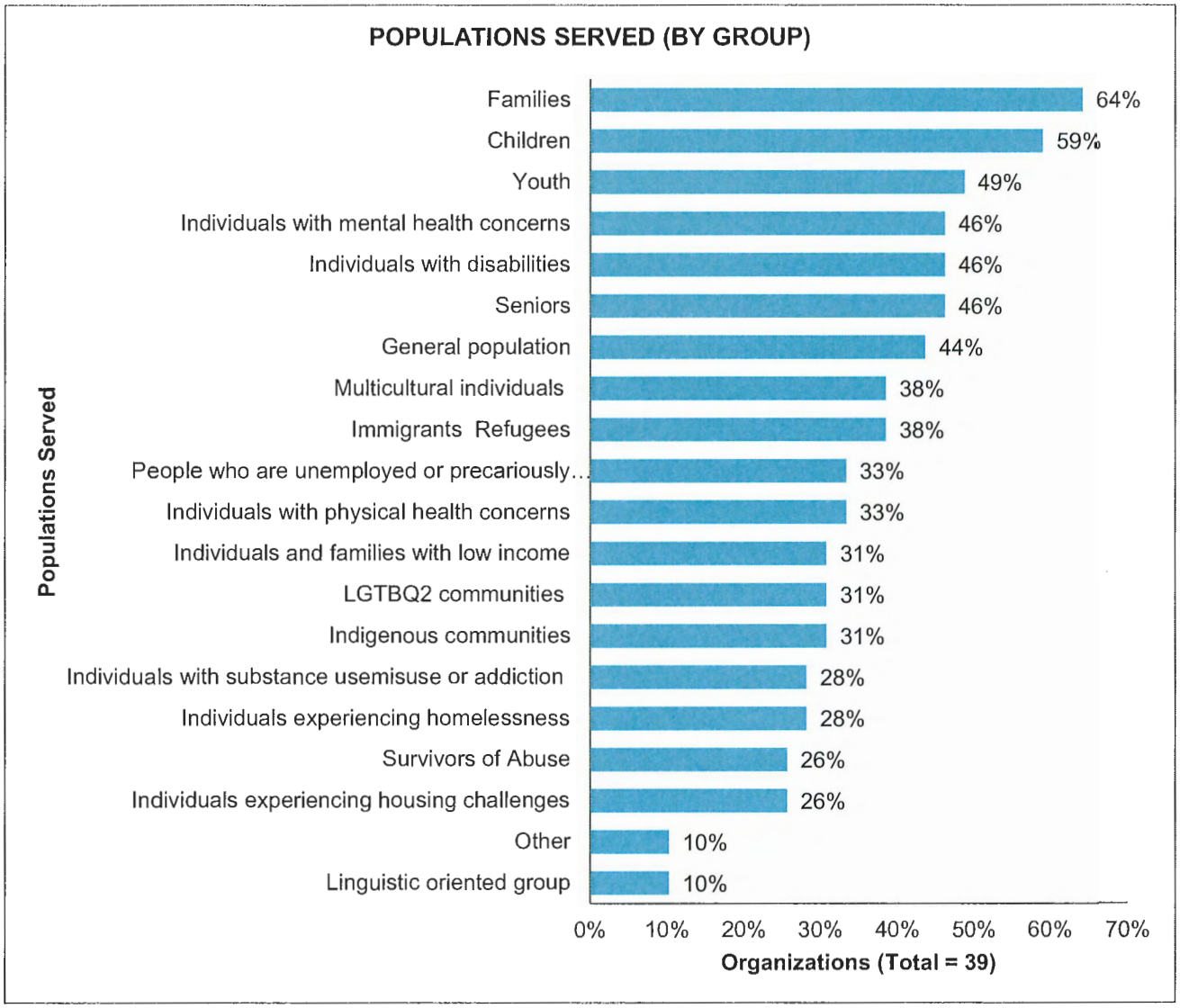
- 82% of respondent NPOs identify as registered not-for-profits.
- 72% of respondent NPOs identify as registered charities.
- 56% of respondent NPOs identify as both a registered not-for-profit and a registered charity.
- 3% of respondent NPOs identify as other (such as a coalition of non-profit services).



POPULATIONS SERVED

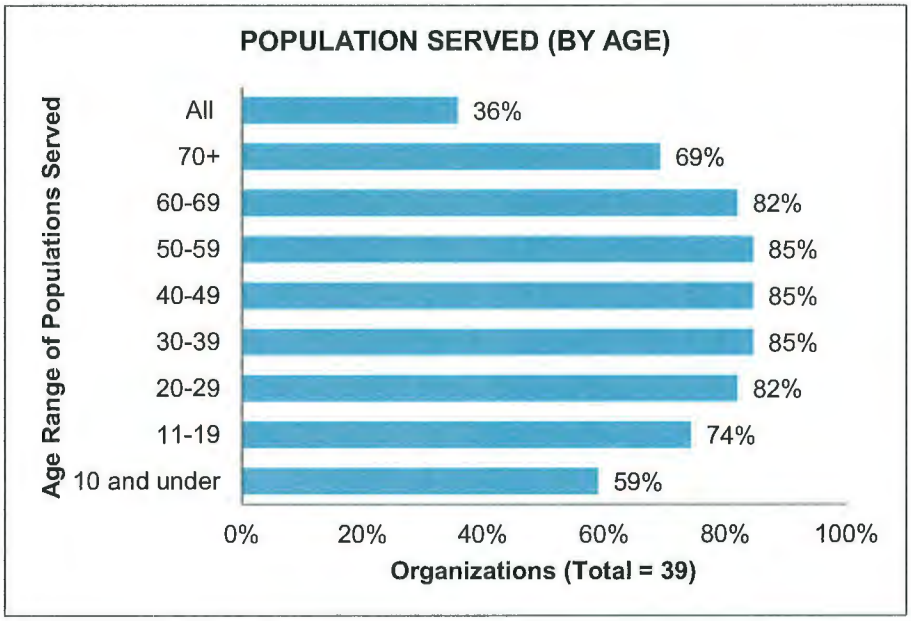
Highlights from the responses to Q: My organization primarily serves the following population(s) in Richmond? Check all that apply.

- The top five populations served by group by respondent NPOs are families (64%), children (59%), youth (49%), individuals with mental health concerns (46%) and individuals with disabilities (46%).
- The lowest five populations served by group by respondent NPOs are linguistic oriented groups (10%), 'other' groups (10%) (described by respondents as breastfeeding and expectant mothers, artists, the broader chinese community and homeless animals), individuals experiencing housing challenges (26%), survivors of abuse (26%) and individuals experiencing homelessness (28%).



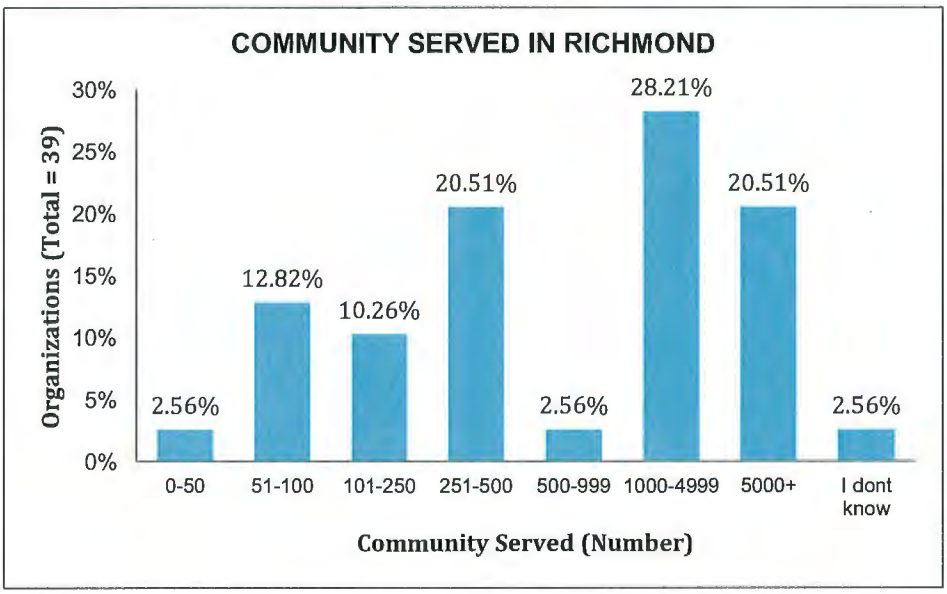
Highlights from the responses to Q: My organization primarily serves the following age range(s) of people in Richmond? Check all that apply.

- Most respondent NPOs serve a broad range of ages of people in the community.
- 36% of respondent NPOs serve all age groups
- 85% of respondent NPOs serve people 30 - 59 years old.
- 59% of respondent NPO's serve children 10 years and under.



Highlights from the responses to *Q: This fiscal year (April 1, 2017 through to March 31, 2018), my organization has/will serve the following number of clients or users in Richmond?*

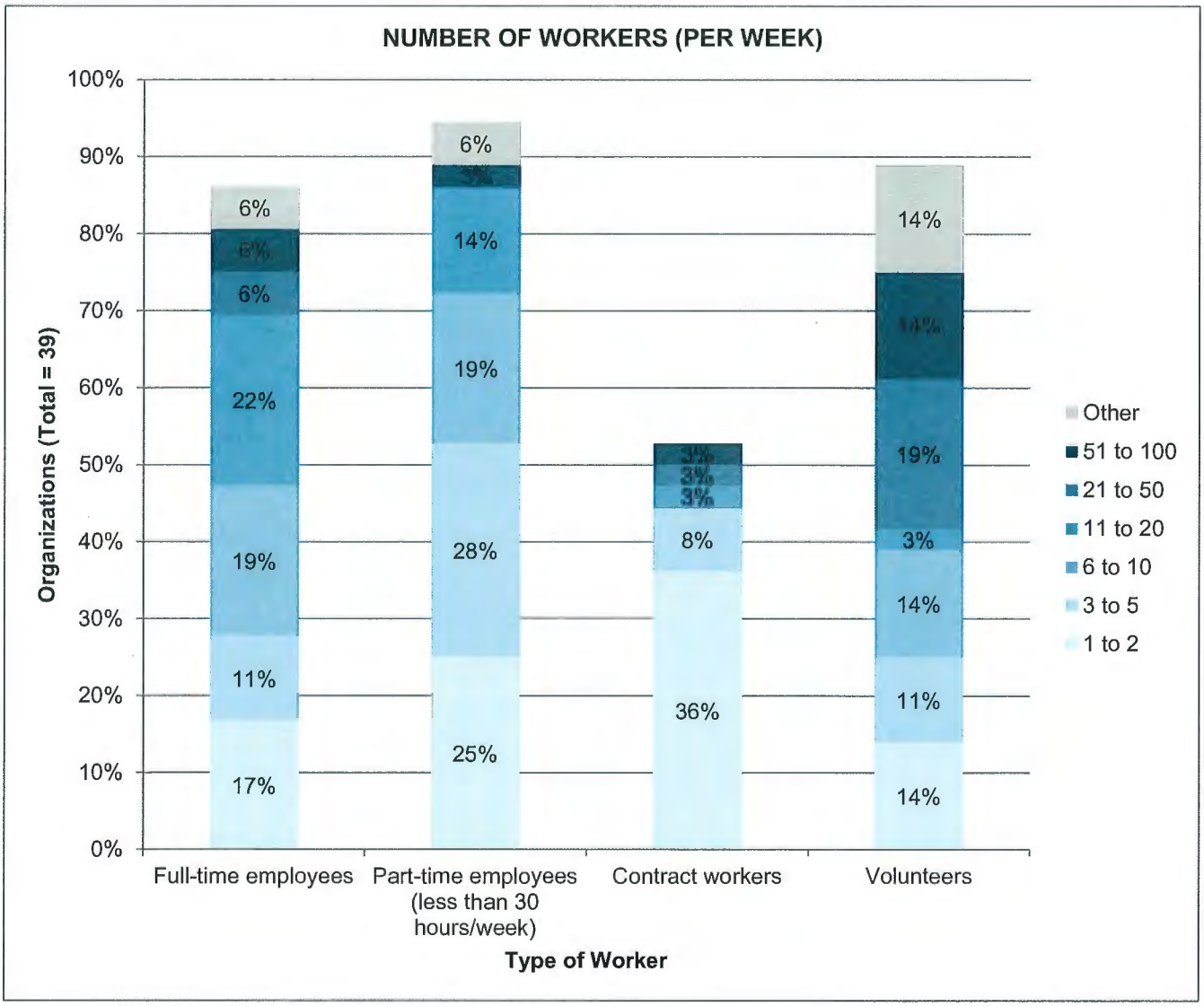
- 49% of all respondent NPOs serve between 1000-5000+ community members.
- 21% of respondent NPOs serve 251-500 people.
- 50% of respondent NPOs serve 0-999 people.
- This indicates that many of NPOs operating in Richmond reach large numbers of community members who require a broad scope of social services.



HUMAN RESOURCES

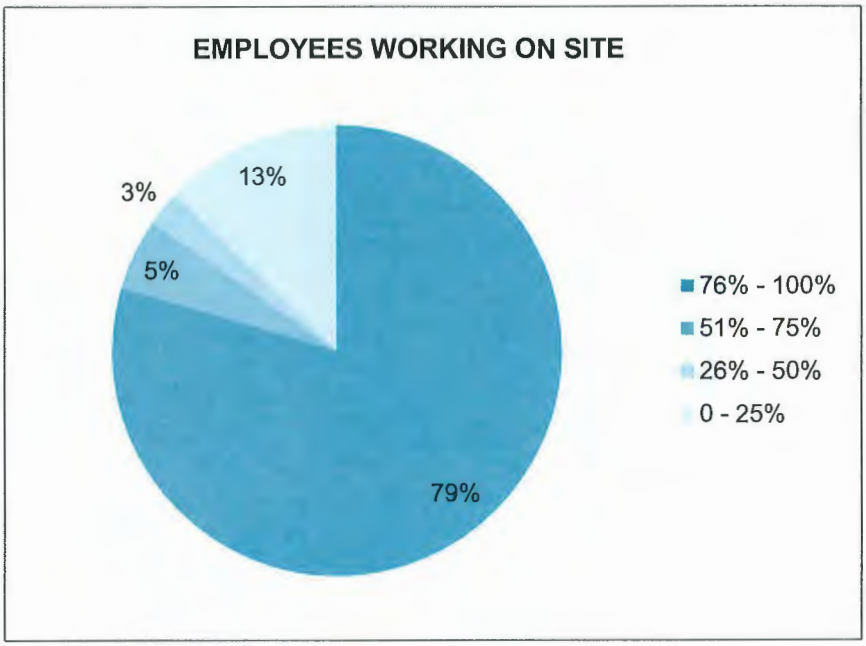
Highlights from the responses to Q: How many people work in all of your organizations community, office, retail and industrial spaces in an average week?

- Many respondent NPOs rely on volunteers to provide services and programs to their target communities.
- 12% of NPOs have 21 to 100 full-time employees per week, 22% have 11 to 20 full-time employees per week, 19% have 6 to 10 per week, 11% have 3 to 5 per week and 17% have 1 to 2 per week.
- Most NPOs rely on part-time employees with 25% having 1 to 2 part-time employees per week, 28% having 3 to 5 per week, 19% having 6 to 10 per week and 14% having 11 to 20 per week.
- Some NPOs do not have contract workers (18%) while 36% have between 1 to 2 contract workers per week at their organization.
- 14% of respondent NPOs have 6 to 10 volunteers per week, 19% have 21 to 50 volunteers per week and 14% have 51 to 100 volunteers per week.



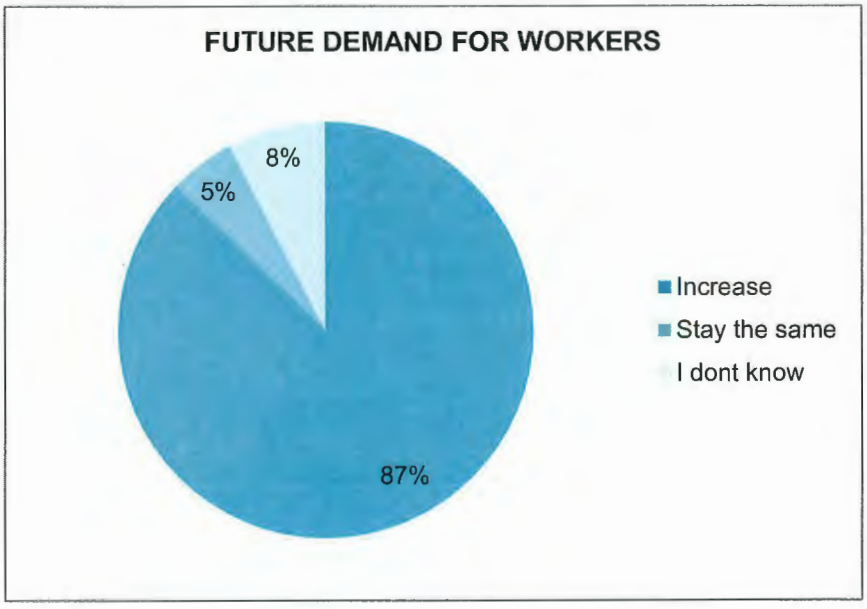
Highlights from the responses to Q: How many employees work on site?

- 79% of respondent NPOs identified that 76%-100% of employees work on site.
- 13% of respondent NPOs identified that 26%-50% of employees work on site.
- Effective workspaces are integral to NPO's providing programs and services.
- Despite the notion that many tasks will move to the virtual environment and people will increasingly work from remote locations, the physical place of work still matters.
- NPO's space footprints may grow, not shrink, over time.



Highlights from the responses to Q: The number of employees and volunteers who may be working with my organization over the next 5 to 10 years will:

- The majority of respondent NPOs (87%) project an increase in future demand for workers including contract workers, part-time and full-time employees.



7.2 CURRENT SPACE & NEEDS

A key objective of the survey is to understand NPOs current space and needs.

The majority of survey respondents have one site (40%) in Richmond that is their sole location (39%) or primary / head office (32%) and mainly a public or community facility (44%), office building (33%) or multi-use building (28%). Nearly half (47%) of all survey respondents share space with other organizations in Richmond. In terms of location, 85% of survey respondents serve people from across the City of Richmond and 69% would like to relocate or have a new space located in Richmond City Centre to conveniently serve these clients.

Nearly half of all survey respondents have or plan to add or expand existing programs and services this fiscal year while the other half plan to maintain current programs and services. This translates into 41% of survey respondents planning to expand, increase or add an additional location to their space in Richmond.

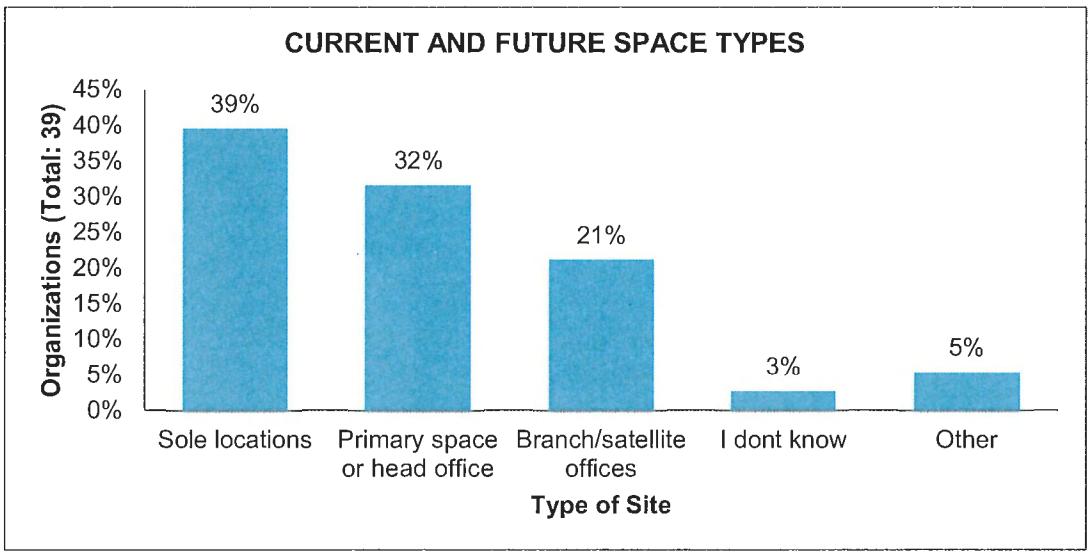
Most survey respondents perceive it is very important to remain located in the City of Richmond (90%) while most are somewhat or very satisfied (72%) with their current space. Nevertheless, 62% of survey respondents indicated that their current space has inhibited their ability to provide programs or services.

These findings indicate that the majority of respondent NPOs primarily need one to two spaces in Richmond, that are larger than their current 1,000 or 2,000 – 3,000 square foot space, in a diversity of typologies (community, office, multi-unit residential, shared), mainly located in Richmond City Centre.

SPACE TYPES

Highlights from the response to Q: What are or will be my organization's current or future Richmond premises?

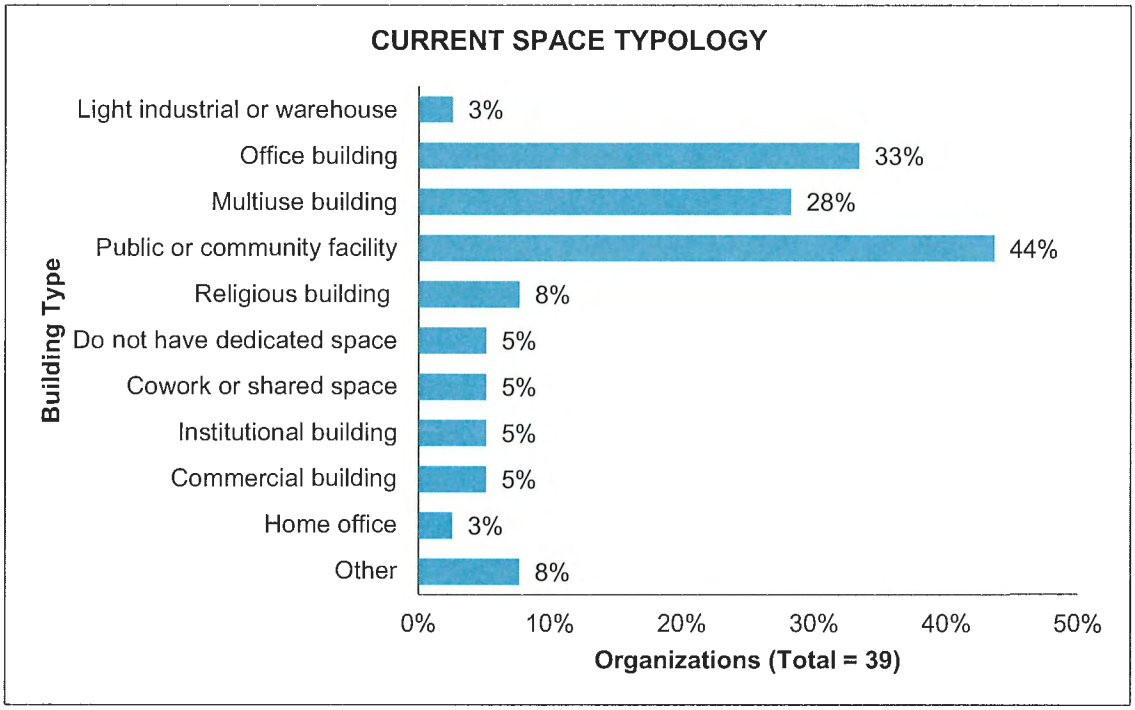
- 39% of respondent NPOs operate sole locations in Richmond.
- 32% of respondent NPOs have a primary space or head office in Richmond.
- 21% of respondent NPOs have a branch or satellite offices in Richmond.
- 5% of respondent NPOs have 'other' sites such as home offices or both a head office and satellite spaces in Richmond.



CURRENT SPACE TYPOLOGY

Highlights from the responses to Q: How would my organization describe this space?

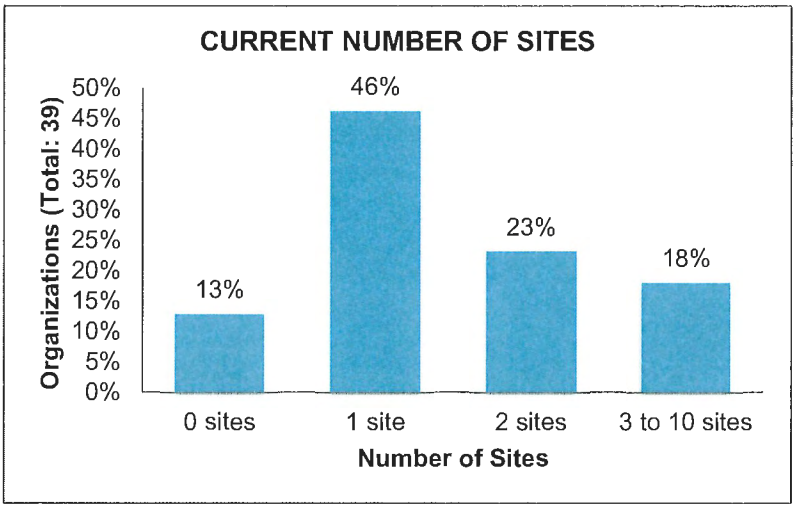
- 44% of respondent NPOs space is public or community facilities.
- 33% of respondent NPOs space is office buildings.
- 28% of respondent NPOs space is multi-use buildings.
- The respondents that described their space as 'other' included farmland barns, non-profit organization and residential property.



CURRENT NUMBER OF SITES

Highlights from the responses to Q: My organization operates the following number of sites (properties/units) in Richmond?

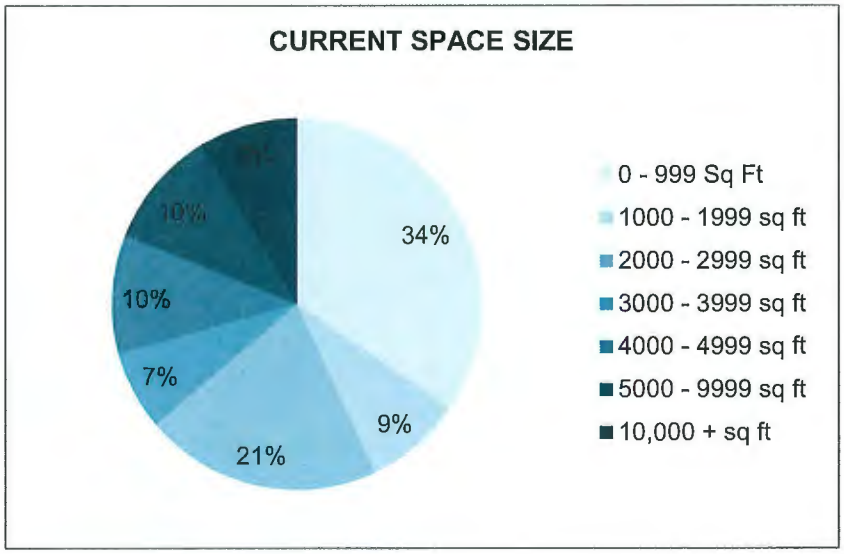
- 46% of respondent NPOs operate only 1 site in Richmond
- 23% of respondent NPOs operate 2 sites in Richmond
- 18% of respondent NPOs operate 3 to 10 sites in Richmond
- 13% of respondent NPOs do not have dedicated sites in Richmond



CURRENT SPACE SIZE

Highlights from the responses to Q: What is the approximate size of your organizations space?

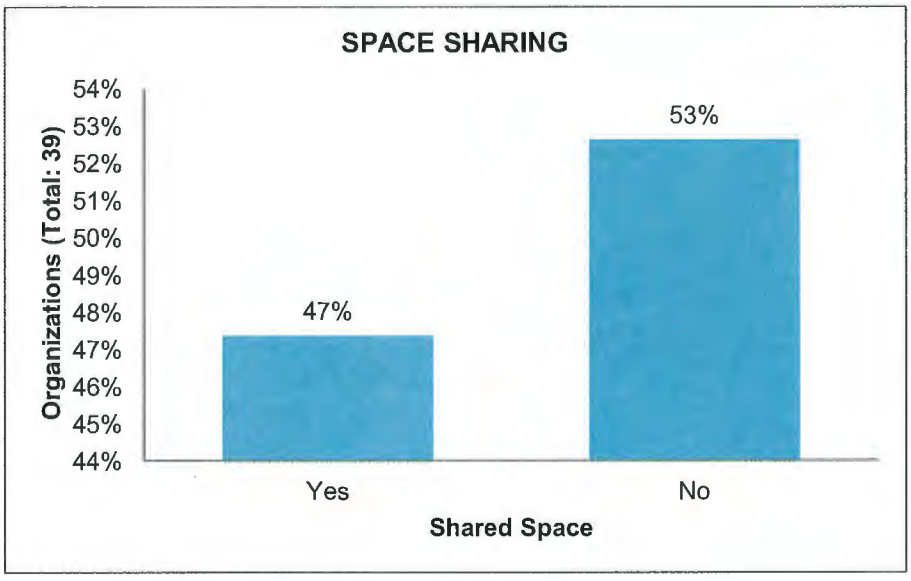
- 34% of respondent NPOs have small space (0-999 square feet).
- 9% of respondent NPOs have medium space (1000-1999 square feet).
- 21% of respondent NPOs have medium space (2000-2999 square feet).
- 36% of respondent NPOs have larger space (3000+ square feet).



SPACE SHARING STATUS

Highlights from the responses to Q: My organization currently shares space with another organization in Richmond?

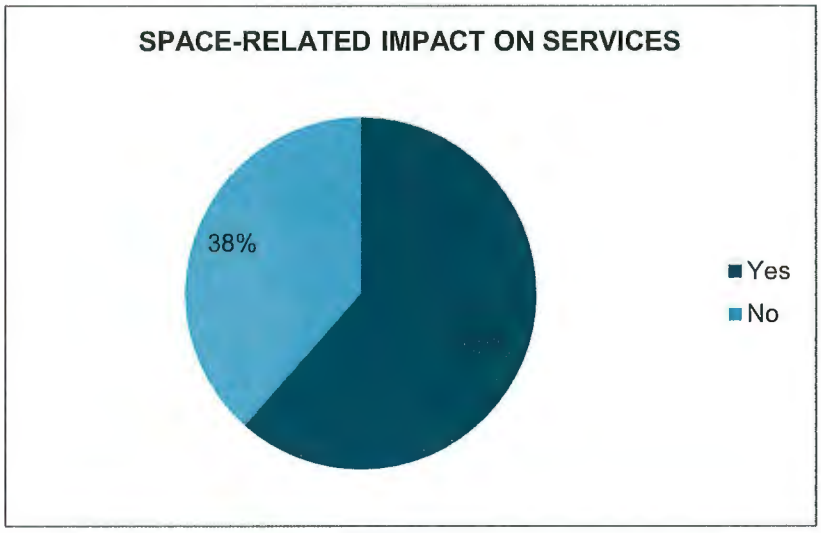
- 47% of respondent NPOs that operate sites in Richmond share space with other organizations in some capacity.
- 53% of respondent NPOs that operate sites in Richmond do not share any space.



SPACE IMPACTS ON SERVICES

Highlights from the responses to Q: Has my organization's current space (or lack of space) limited or inhibited our ability to offer programs and services?

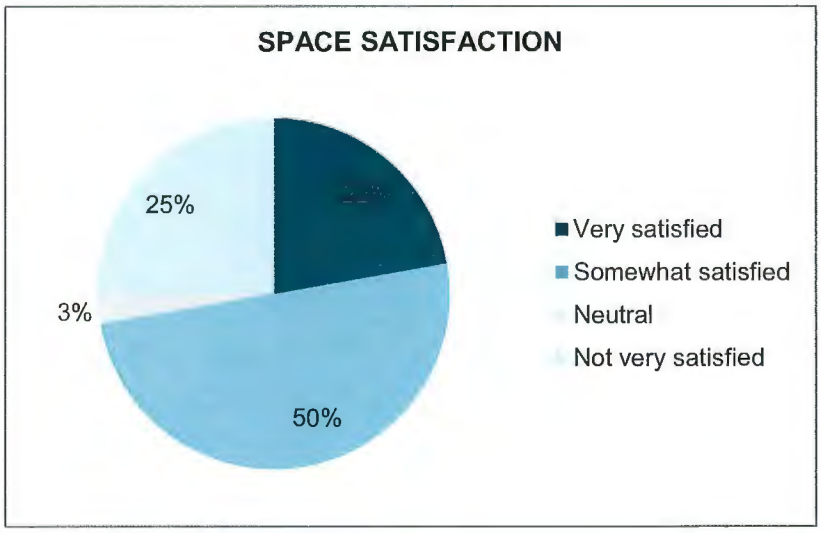
- 62% of respondent NPOs perceive that their organizations current space or lack of space has inhibited their ability to provide programs or services.
- 38% of respondent NPOs perceive that their organizations current space or lack of space has not inhibited their ability to provide programs or services.



SPACE SATISFACTION

Highlights from the responses to Q: How much does this space meet my organization's needs?

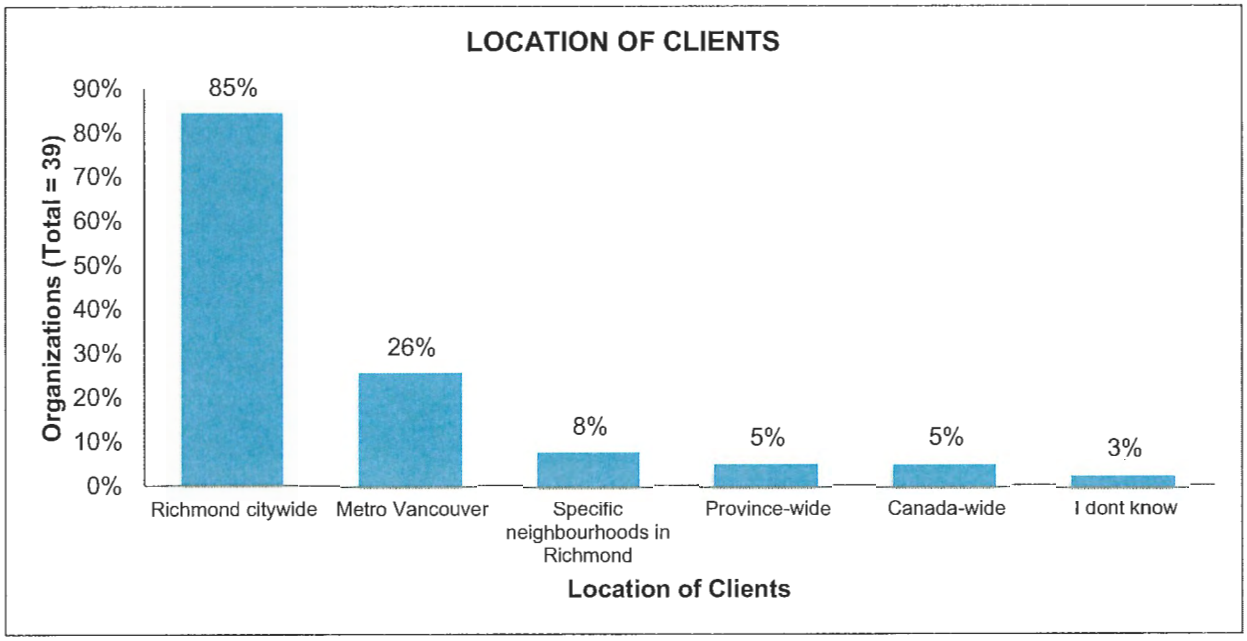
- 50% of respondent NPOs are somewhat satisfied with their current space(s).
- 25% of respondent NPOs are not very satisfied with their current space(s).
- 22% of respondent NPOs are very satisfied with their current space(s).



LOCATION

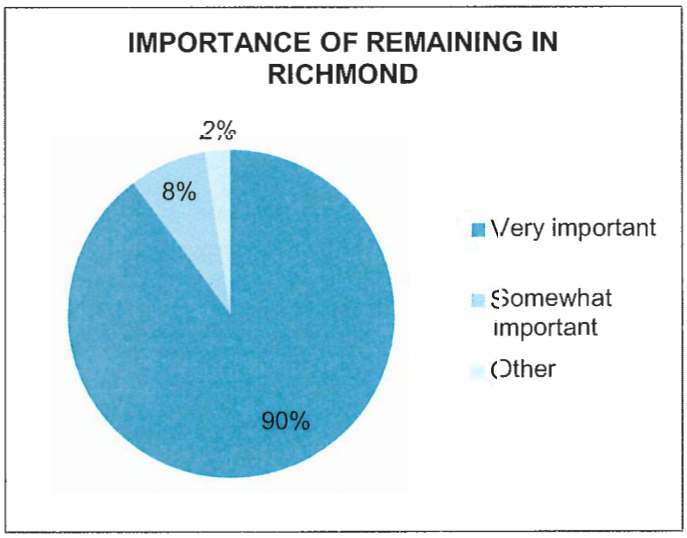
Highlights from the responses to Q: The majority of my organization's clients/users geographically live/commute from?

- 85% of respondent NPOs serve people from across the City of Richmond.
- 26% of respondent NPOs serve people from across Metro Vancouver.
- 8% of respondent NPOs serve people from specific neighborhoods in Richmond.



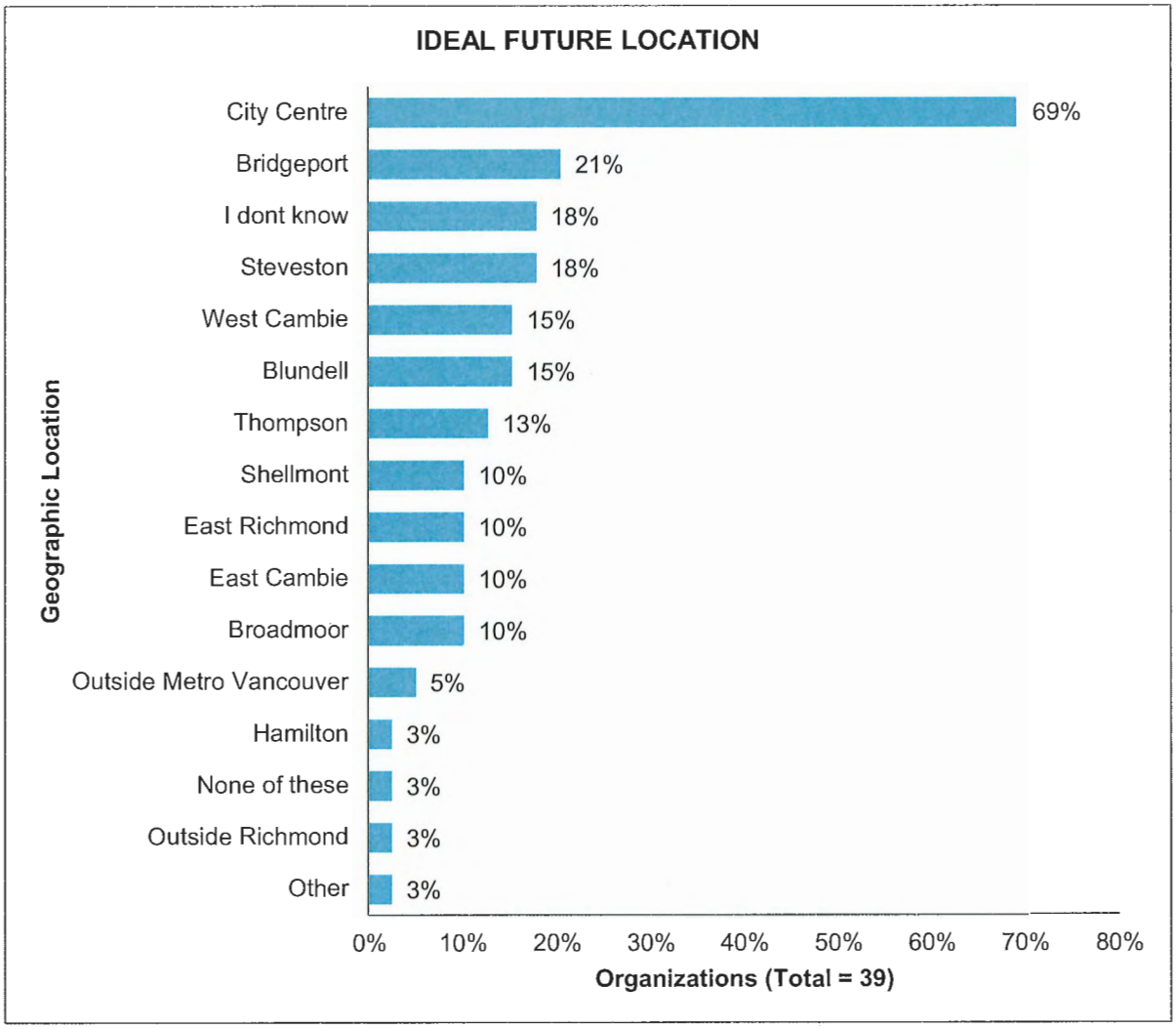
Highlights from the responses to Q: How important is it that my organization remains in Richmond?

- 90% of respondent NPOs perceive it is very important to remain located in Richmond.
- 8% of respondent NPOs perceive it is somewhat important to remain in Richmond.
- 2% of respondent NPOs perceive it a "other" (such as they are new to Richmond and would like to continue to serve the city).
- None of the respondent NPOs identified it was not important at all or not very important for their organization to remain in Richmond.



Highlights from the responses to Q: If relocating or opening another premise is necessary in the future, my organization would ideally be located in?

- 69% of respondent NPOs would like relocated or new space to be located in Richmond City Centre.
- 21% of respondent NPOs would like relocated or new space to be located in Bridgeport.
- 18% of respondent NPOs would like relocated or new space to be located in Steveston.
- 15% of respondent NPOs would like relocated or new space to be located in West Cambie.
- 15% of respondent NPOs would like relocated or new space to be located in Blundell.
- 55% of the 11 NPOs who do not currently operate sites in Richmond do want to operate in Richmond within the next 5 to 10 years. This shows there is some latent demand to operate sites in Richmond.



7.3 TENURE & STABILITY

A key objective of the survey is to understand NPOs space tenure, stability and future needs.

Survey respondents relationship to their commercial and industrial space varies: 26% lease or rent space from the private sector, 23% use space that is donated to them at no cost, 10% lease or rent space from government and 8% sub-lease space from another organization. Given the variety of freehold and leasehold tenure, 70% of survey respondents are very or somewhat secure with their space while 19% are not or not very secure in their space.

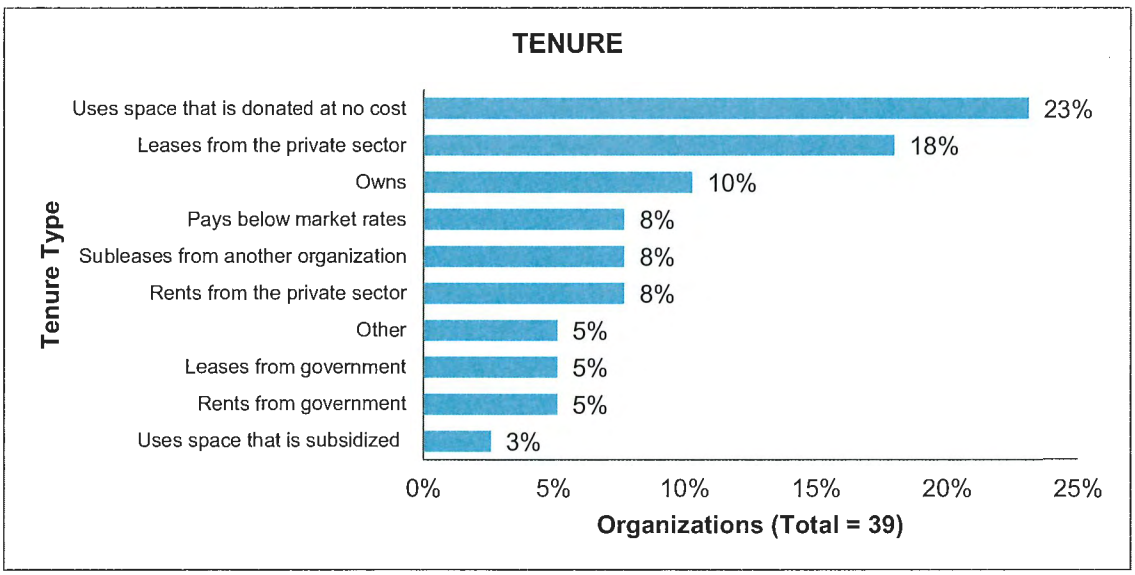
The length of lease/rental terms vary, with 55% of survey respondents having a lease or rental term of 1 to 5 years and 14% having a term of 5 or more years. About half of respondent NPOs plan to maintain programs and services while the other half plan to expand or add programs or services. This is reflected in organizations need for and interest in expanding their space within the next 5 to 10 years -- 28% plan to expand space, 28% plan to maintain their space and 56% of the NPOs who own space, would like to redevelop their property.

There is a high level of uncertainty amongst NPOs who lease/rent space, given that 35% do not know if they need to move in the coming years. In the event that a respondent has to move, the top reasons for moving include rental/lease expiration and adding/expanding/growing programs and services. In a future move, survey respondents indicated the following top factors to consider in a new space are location, proximity to clients/users, the features of space and proximity to transit.

The findings indicate that respondent NPOs need a variety of tenure options, with a preference for donated or subsidized space, stable and long-term lease / rental terms and space that allows for expansion and growth. In the event a respondent has to move, it will be important to consider NPO space needs in the development of key areas close to clients / users and transit, such as Richmond City Centre.

Highlights from responses to Q: What type of tenure does my organization have?

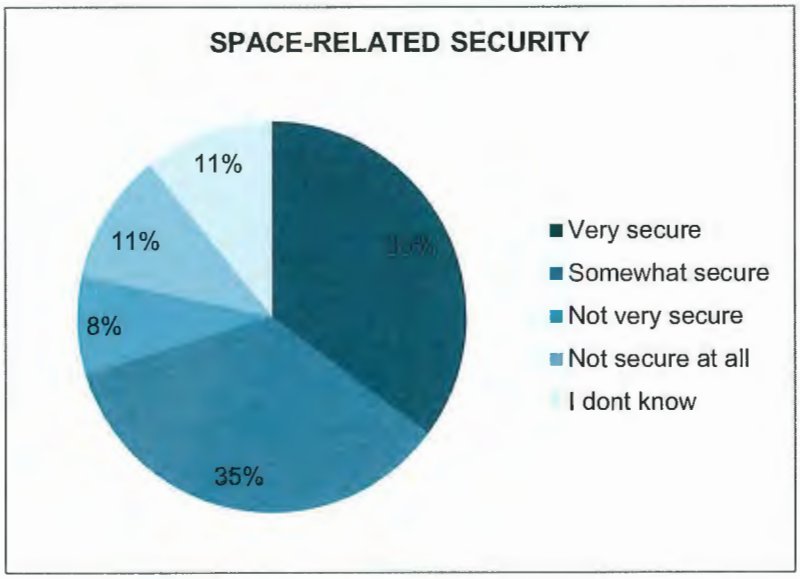
- 26% of respondent NPOs lease or rent space from the private sector.
- 23% of respondent NPOs use space that is donated to them at no cost.
- 10% of respondent NPOs own their own property.
- 10% of respondent NPOs lease or rent space from government.
- 8% of respondent NPOs sub-lease space from another organization.



STABILITY

Highlights from the responses to Q: How secure is my organization for the next 5 to 10 years?

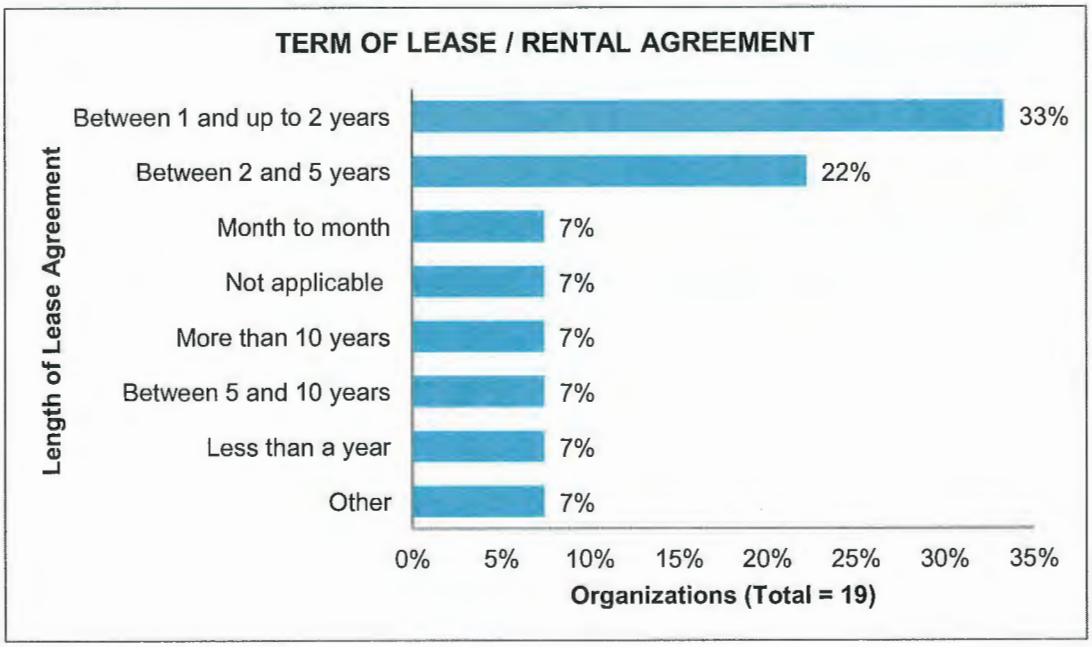
- 70% of respondent NPOs are very secure or somewhat secure with their space.
- 19% of respondent NPOs are not very secure or not secure at all in their space.



LEASE/RENTAL AGREEMENT

Highlights from the responses to Q: What is the term/length of my organization's lease/rental agreement?

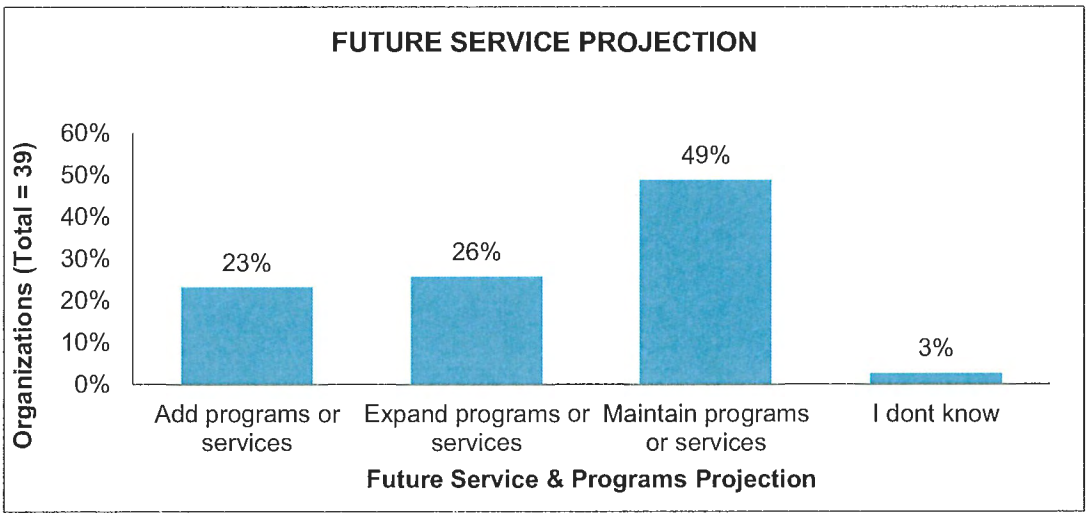
- 55% of respondent NPOs have a lease or rental term of 1 to 5 years.
- 14% of respondent NPOs have a lease or rental term of 5 or more years.
- 14% of respondent NPOs have a lease or rental term of less than a year.



FUTURE SPACE NEEDS

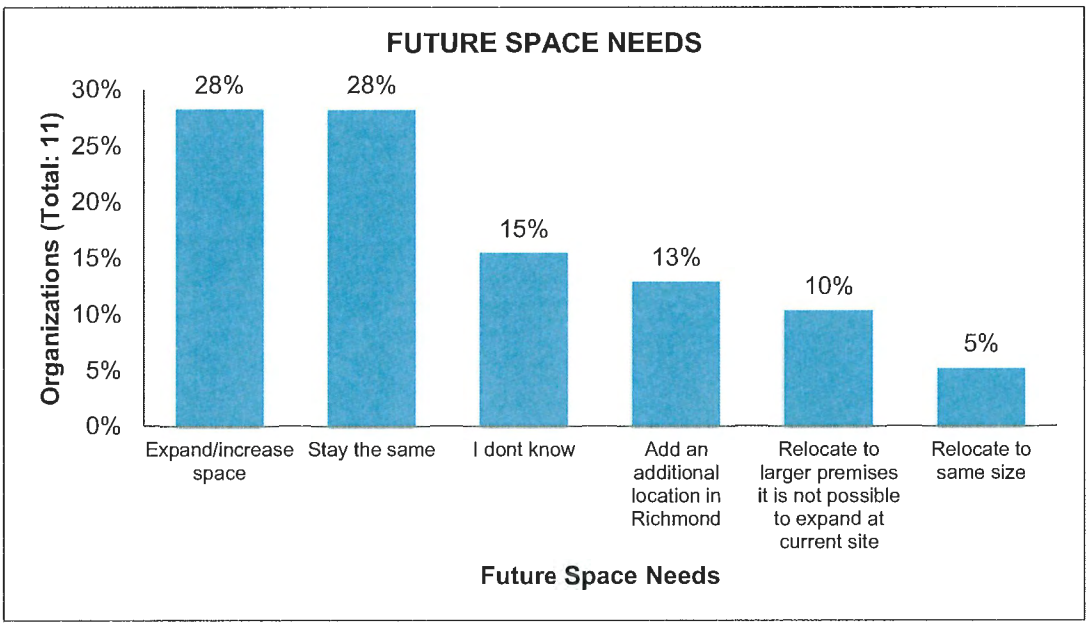
Highlights from the responses to Q: This fiscal year, my organization has/will?

- 49% of respondent NPOs have or plan to add or expand existing programs or services this fiscal year.
- 49% of respondent NPOs have or plan to maintain current programs and services as is.



Highlights from the responses to Q: Within the next 5 to 10 years, my organization's space will need to?

- 28% of respondent NPO's plan to expand or increase their space.
- 28% of respondent NPO's plan to maintain current space.
- 13% of respondent NPO's plan to add an additional location in Richmond.



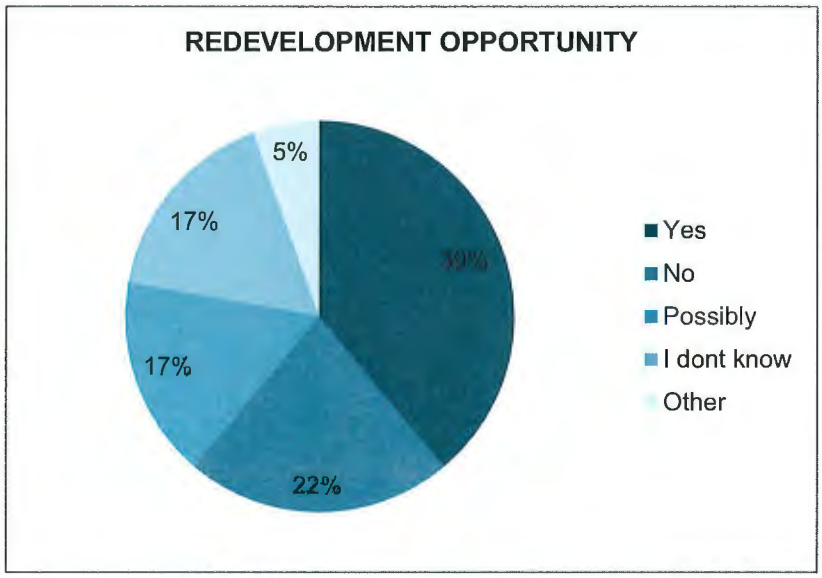
Highlights from the responses to Q: If my organization has plans to grow its space in the next 5 - 10 years, why and how much additional space is needed (provide estimated number of sites and square footage per site)?

- 9 respondent NPOs indicated that they plan to grow on average 4,078 additional square feet of space within the next 5-10 years, for a total need of 36,700 square feet.

REDEVELOPMENT POTENTIAL

Highlights from the responses to Q: If owning, would my organization consider redeveloping any of our sites to better meet our needs?

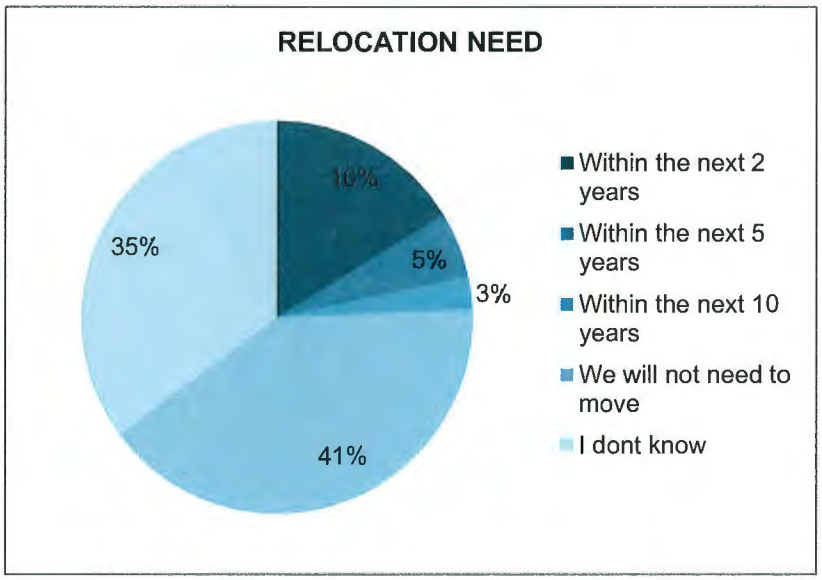
- 39% of respondent NPOs would consider redeveloping their sites.
- 17% of respondent NPOs would possibly consider redeveloping their sites.
- 22% of respondent NPOs would not consider redeveloping their sites.



NEED TO MOVE

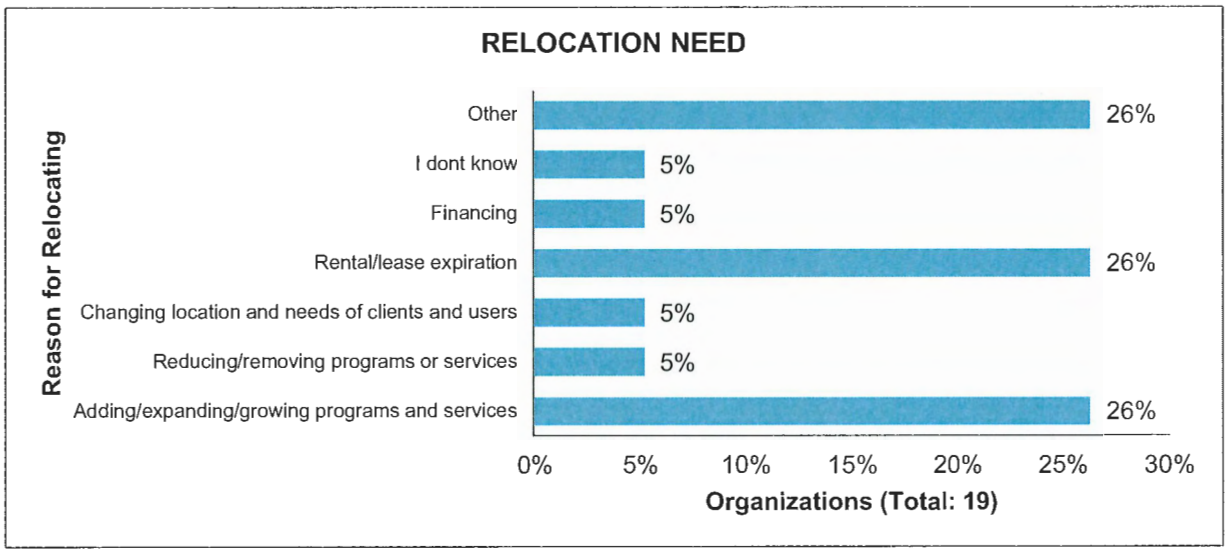
Highlights from the responses to Q: Does my organization need to move in the coming years?

- 41% of respondent NPOs do not need to move in the coming years.
- 35% of respondent NPOs do not know if they need to move in the coming years.
- 16% of respondent NPOs need to move in the next 2 years.
- 8% of respondent NPOs need to move in the next to 10 years.
- The high response to "I don't know" if an organization will need to move or not suggests there is a high amount of uncertainty with respect to organizational strategic planning, or the inability to plan due to uncertainty of funding, lease agreements, etc.



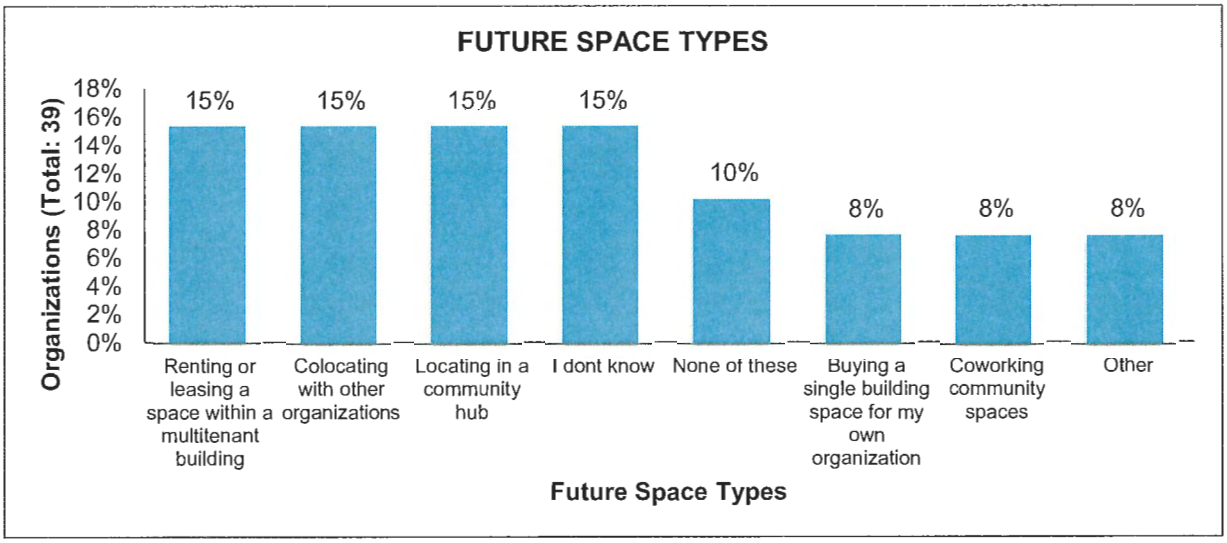
Highlights from the responses to Q: Why will my organization need to move in the coming years?

- The top reasons respondent NPOs indicated they would need to move include: (1) rental/lease expiration, (2) adding/expanding/growing programs and services, (3) other (such as donated space is being removed, a demolition clause is being executed, and there is less overall available space in co-location), (4) financing (5) changing location and needs of clients and users and (6) reducing/removing programs or services.



Highlights from the responses to Q: In a future move or expansion my organization would consider?

- 15% of respondent NPOs would consider renting or leasing a space within a multi-tenant building.
- 15% of respondent NPOs would consider co-locating with other organizations.
- 15% of respondent NPOs would consider locating in a community hub.
- 10% of respondent NPOs would consider none of these.
- 8% of respondent NPOs would consider buying a space.
- 8% of respondent NPOs would consider co-working community spaces.

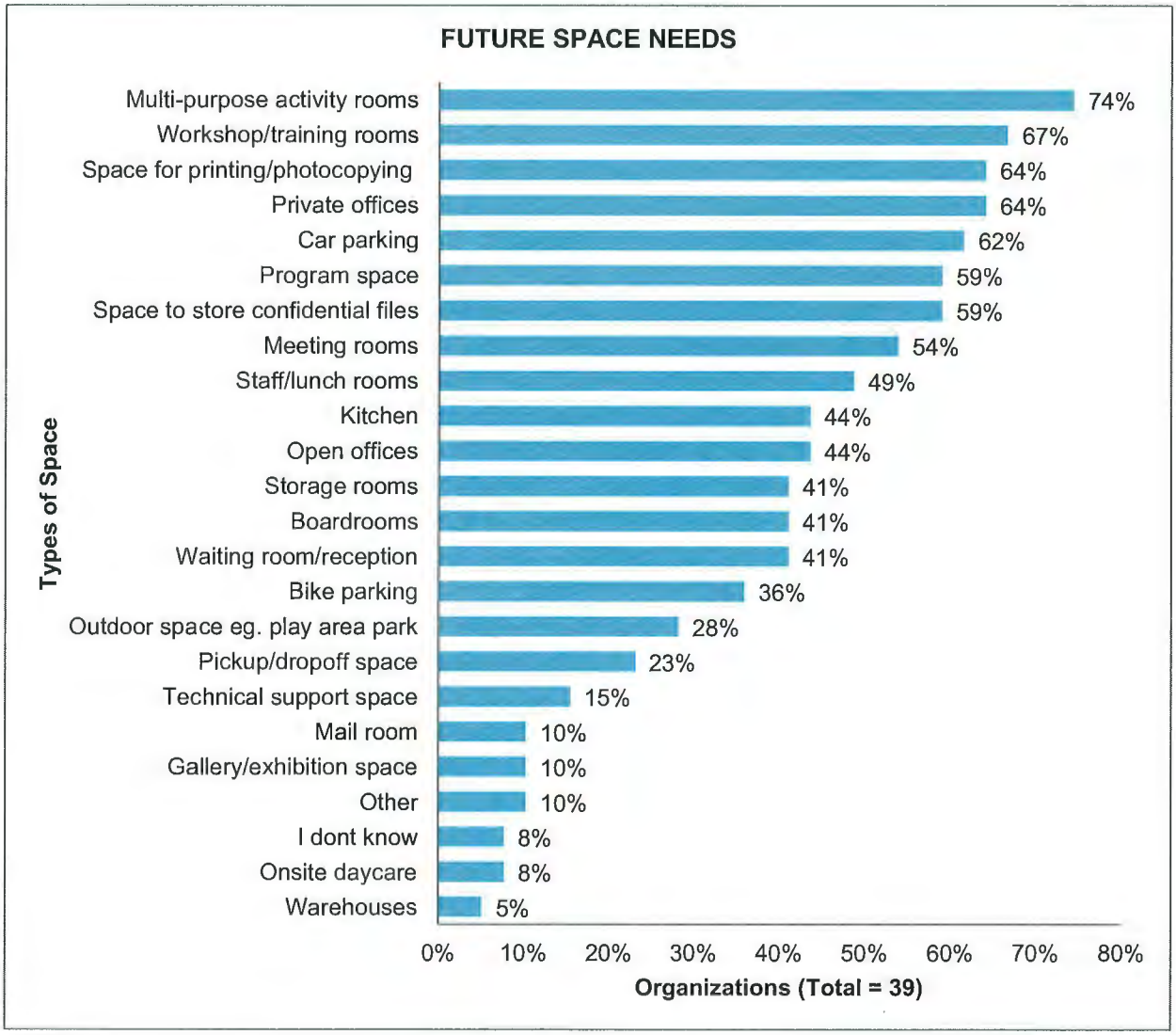


FEATURES CONSIDERED IMPORTANT IN A FUTURE MOVE

Highlights from the responses to Q: What type(s) of space will my organization need in the future?

The top building features needed by respondent NPO's in the future are:

- multi-purpose activity rooms (flexible spaces that accommodate a range of activities) (74%)
- workshop / training rooms (space for educational activities) (67%)
- space for printing/photocopying (64%)
- private offices (64%)
- car parking (62%)
- program space (space for clients and community members) (59%)
- space to store confidential files (59%)

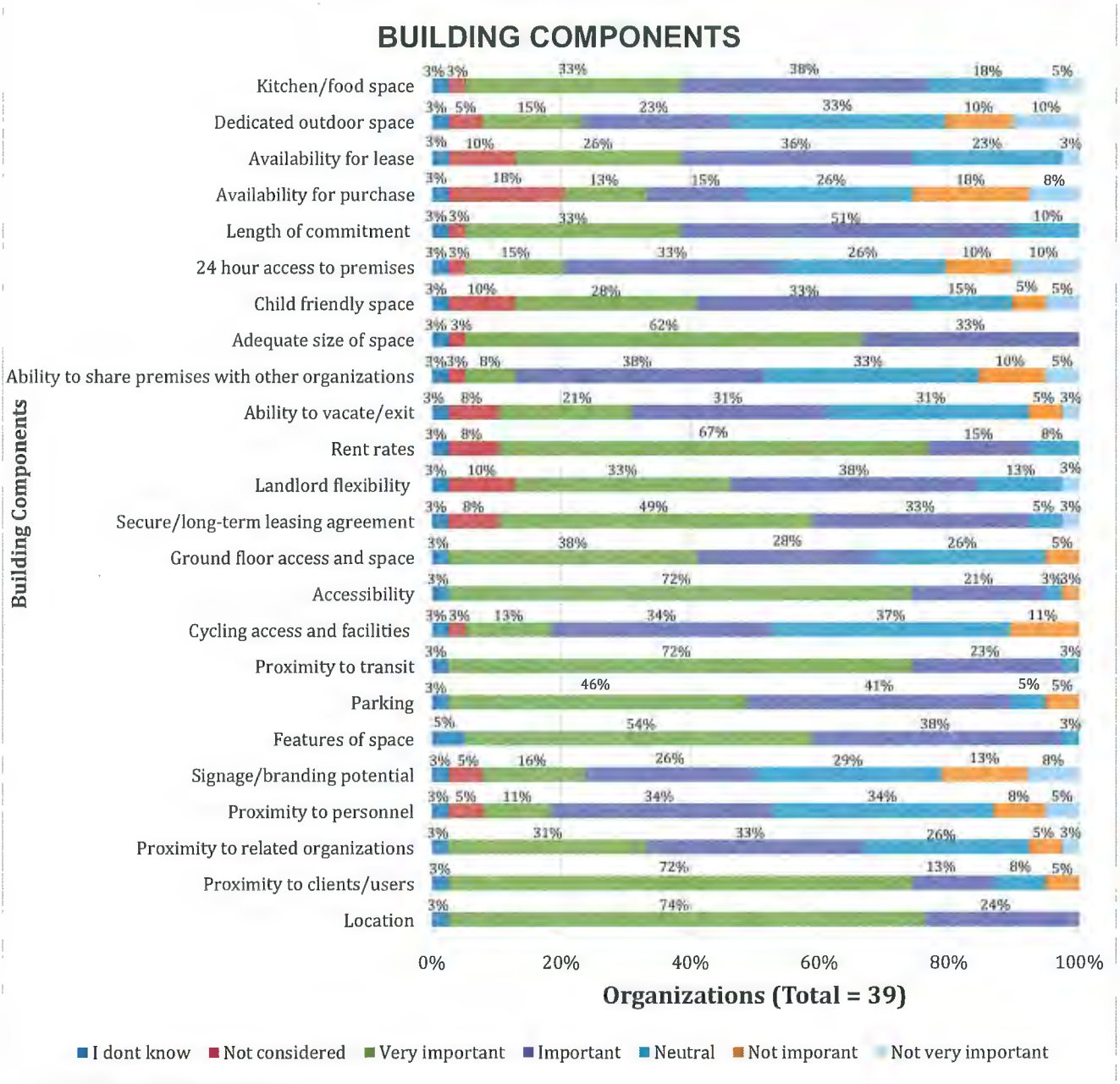


FACTORS IMPORTANT IN A FUTURE MOVE

Highlights from the responses to Q: What are the most important factors my organization considers when choosing space?

The top building components ranked by respondent NPO's are:

- Location
- Proximity to clients/users
- Features of space
- Proximity to transit
- Accessibility
- Rent rates
- Adequate size of space



7.4 AFFORDABILITY

A key objective of the survey is to better understand the issues of affordability that NPOs in Richmond may be experiencing. The survey dedicated a specific section to affordability, with questions that obtained information pertaining to the base rent, lease, or mortgage payments NPOs are paying, as well as other occupancy costs.

The detailed cost questions appeared to be challenging for some NPOs as there were low response rates on some questions. Most survey respondents (59%) answered questions pertaining to the total amount of space-related costs, while few provided detailed breakdowns of space-related costs. Furthermore, there appeared to be some confusion and varying interpretations of the questions that asked for monthly lease/rental and mortgage costs.

The majority of survey respondents (53%) have small operating budgets of less than $1 million per year, while 29% of respondents have an annual budget between $1 and $5 million and 13% have an annual budget of more than $7.5 million. Of the organizations who own property, 40% have space-related costs of over $20,000 per month. Of the organizations that lease or rent space, 23% use space that is donated to them at no cost, 22% have space-related costs of $1,000 - $1,999 per month, 21% have costs of $5,000 - $9,999 per month and 21% have costs of $10,000 or more per month.

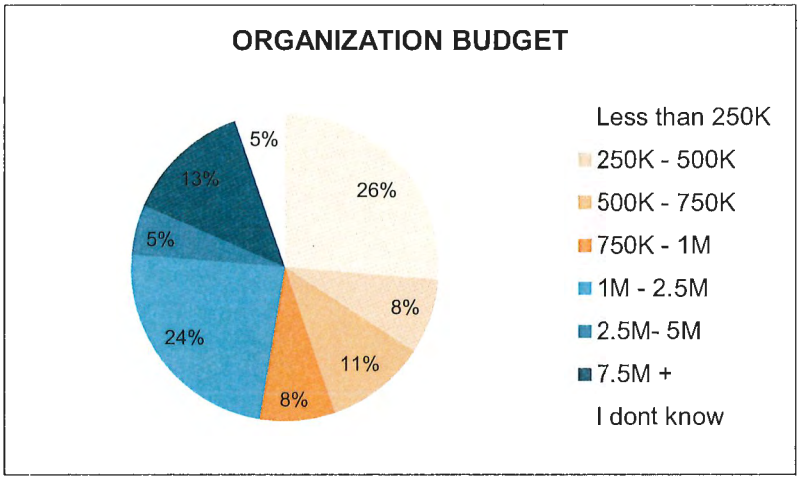
In terms of affordability, 72% of survey respondents said they are paying the right amount for space relative to what they can afford while 18% are paying more for space relative to what they can afford. The high response to "right amount" could reflect the fact that many of the respondent NPOs (23%) use space that is donated to them at no cost, 10% lease or rent space from government and 8% pay below market rents. Amongst NPOs that pay market rents / lease rates, the average rent is $18.03 per square foot, which is closely aligned with findings from the office market analysis that shows the average net lease/rent for office space in Richmond is $18.37 per square foot.

Overall, the findings indicate that many respondent NPOs have small operating budgets (53%) and are struggling to secure affordable space (15%) with increasing market costs associated with renting/leasing and owning. Many respondent NPOs need to pursue stable and reliable funding for space and to secure free donated space, space payed for at a nominal price or subsidized space in order to survive and to continue to operate programs and services.

OPERATING BUDGET

Highlights from the responses to Q: This fiscal year, my organization has/will work with the following approximate budget?

- 34% of respondent NPO's have an operating budget of less than $500,000 per year.
- 19% of respondent NPO's have an operating budget of between $500,000 and $1 million per year.
- 29% of respondent NPO's have an operating budget between $1 million and $5 million per year.
- 13% of respondent NPO's have an operating budget of more than $7.5 million per year.



SPACE RELATED COSTS

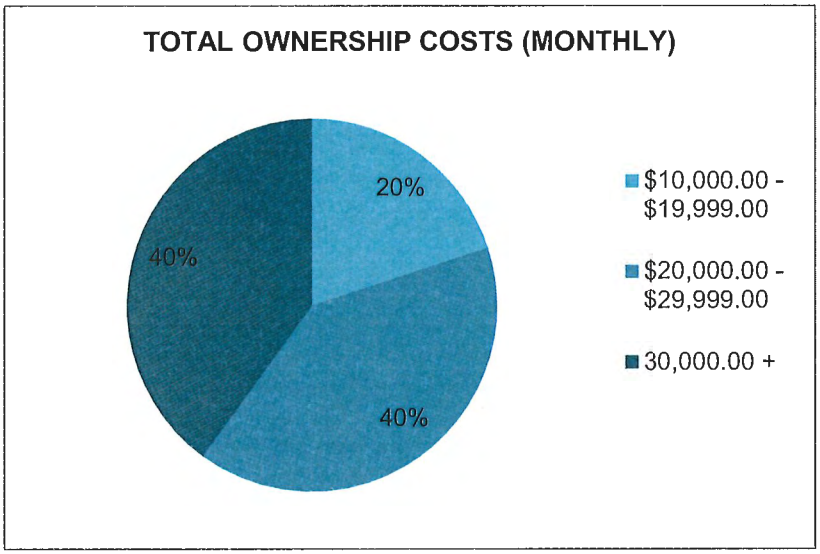
Highlights from responses to Q: Approximately what percentage of your annual expenses/operating costs goes towards your lease, rent, mortgage, and other building expenditures such as property taxes and utilities?

This section had a low response rate thus data is presented as high level findings

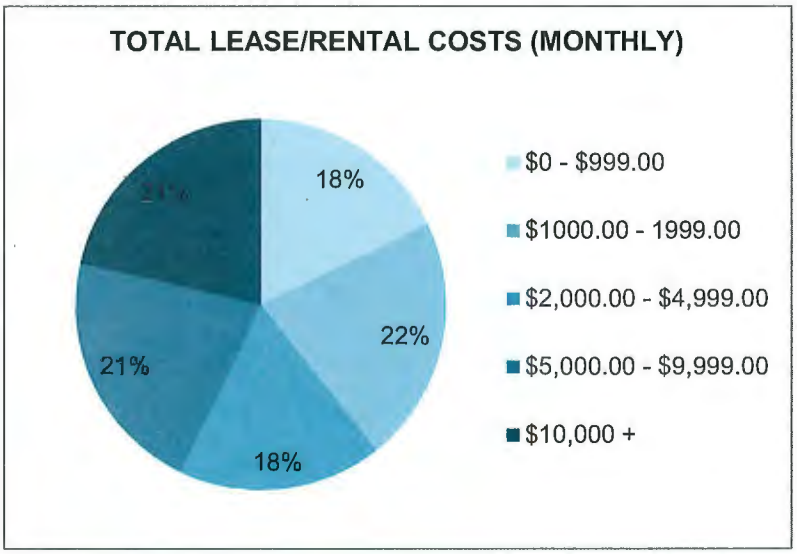
- Respondent NPOs identified they could afford on average 7.3% of their annual expenses/operating costs towards mortgage costs. (3 respondents)
- Respondent NPOs identified they could afford on average 8.2% of their annual expenses/operating costs towards lease/rental costs. (15 respondents)
- Respondent NPOs identified they could afford on average 4.5% of their annual expenses/operating costs towards building maintenance costs. (7 respondents)
- Respondent NPOs identified they could afford on average 7.2% of their annual expenses/operating costs towards building renovation costs. (3 respondents)

Highlights from responses to Q: If you own, what is your organizations monthly expenses (including mortgage payment) on average?

- 20% of respondent NPOs who own their property spend $10,000 - $19,999 on space-related costs on average per month.
- 40% of respondent NPOs who own their property spend $20,000 - $29,999 on space-related costs on average per month.
- 40% of respondent NPOs who own their property spend $30,000 or more on space-related costs on average per month.

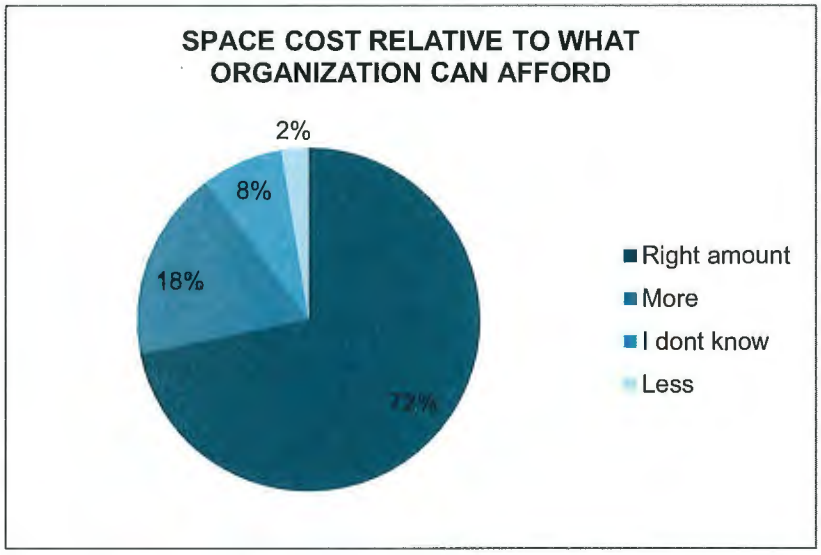


Highlights from the responses to Q: If you lease or rent, what are your total monthly lease or rental costs?



- 18% of respondent NPOs who lease/rent space spend under $999 on space-related costs on average per month.
- 22% of respondent NPOs who lease/rent space spend $1,000 - $1,999 on space-related costs on average per month.
- 18% of respondent NPOs who lease/rent space spend $2,000 - $4,999 on space-related costs on average per month.
- 21% of respondent NPOs who lease/rent space spend $5,000 - $9,999 on space-related costs on average per month.
- 21% of respondent NPOs who lease/rent space spend $10,000 or more on space-related costs on average per month.

Highlights from the responses to Q: My organization is currently paying more/less or the right amount for space relative to what we can afford?



- 72% of respondent NPOs identify paying the right amount for space relative to what they can afford.
- 18% of respondent NPOs identify paying more for space relative to what they can afford.
- 2% of respondent NPOs identify paying less for space relative to what they can afford.
- The high response to "right amount" could reflect the fact that many respondent NPOs (23%) use space donated at no cost, 10% lease or rent space from government and 8% pay below market rents.

Table 2.1: Survey Respondent NPO Market Rates in Richmond

Office and Industrial Market Rate in Richmond: Average Paid Net Rental Rates (measured by dollar per square foot per year [$/SF], where $ = Annual Base Rent, and SF = the area that the organization occupies and uses as defined by organization). Average ownership Rates (measured by dollar per square foot per year [$/SF], where $ = Annual Base Mortgage, and SF = the area that the organization occupies and uses as defined by organization.)	
Average Lease/Rental Rate	Average Ownership Rate
$18.03	**$19.87**

The results from the survey can be compared to the average asking net rental rate and average ownership rate demonstrated in Table 2.1. From the organizations that pay market rents, NPOs reported that they are paying an average of $18.03 per square foot for leased or rented space. This average aligns well with the office market analysis average of $18.37 per square foot for leased or rented space (Table 1.3: Office Supply Net Market Rates in Metro Vancouver). NPOs operating programs and services in leased or rented space in Richmond are on average paying market rents. From the organizations who own their own property and pay ownership related costs (including mortgage payments), NPOs reported that they are paying a higher amount than the average of $19.87 per square foot.

7.5 CHALLENGES & OPPORTUNITIES

A key objective of the survey is to better understand NPO's key space-related challenges and the opportunities to resolve those challenges.

Survey respondents identified numerous challenges related to social purpose real estate including the ability to find and access suitably located space, the affordability of space, the limited supply and increasing demand for space and obtaining reliable and stable funding for space.

Survey respondents also identified numerous strategies to respond to these challenges including diversifying revenue streams, creating a Fund Development Plan, growing the organisations operations and partnering with other social purpose organizations. Survey respondents are also interested in exploring the following opportunities: networking with planners, potential space providers, developers and other NPOs (64%), generating more revenue for space through finding new donors, fundraising and improving capital campaigning (51%), seeking financing and funding such as grants, property tax exemptions, low interest loans and assistance on raising funds and purchasing space (46%) and planning to co-locate with other organizations (46%). The top suggestions survey respondents have for funders, advocacy groups and/or governments to assist in achieving affordable, suitable and secure space are: increase government funding and increase the supply of accessible spaces, affordable spaces and shared spaces, improve tax exemptions, engage NPOs in space-related policy development and funding decisions and update zoning bylaws.

CHALLENGES

Highlights from the responses to Q: The main challenges my organization faces in securing affordable and suitable space are?

1. Accessibility & Location (15 comments)
2. Affordability (13 comments)
3. No challenges (12 comments)
4. Limited Supply (7 comments)
5. Access to Active Transportation (7 comments)
6. Funding (6 comments)
7. Demolition Clause (3 comments)
8. Adequate Meeting Space (3 comments)
9. Adequate Program Space (3 comments)
10. Adequate Staff Space (2 comments)

STRATEGIES

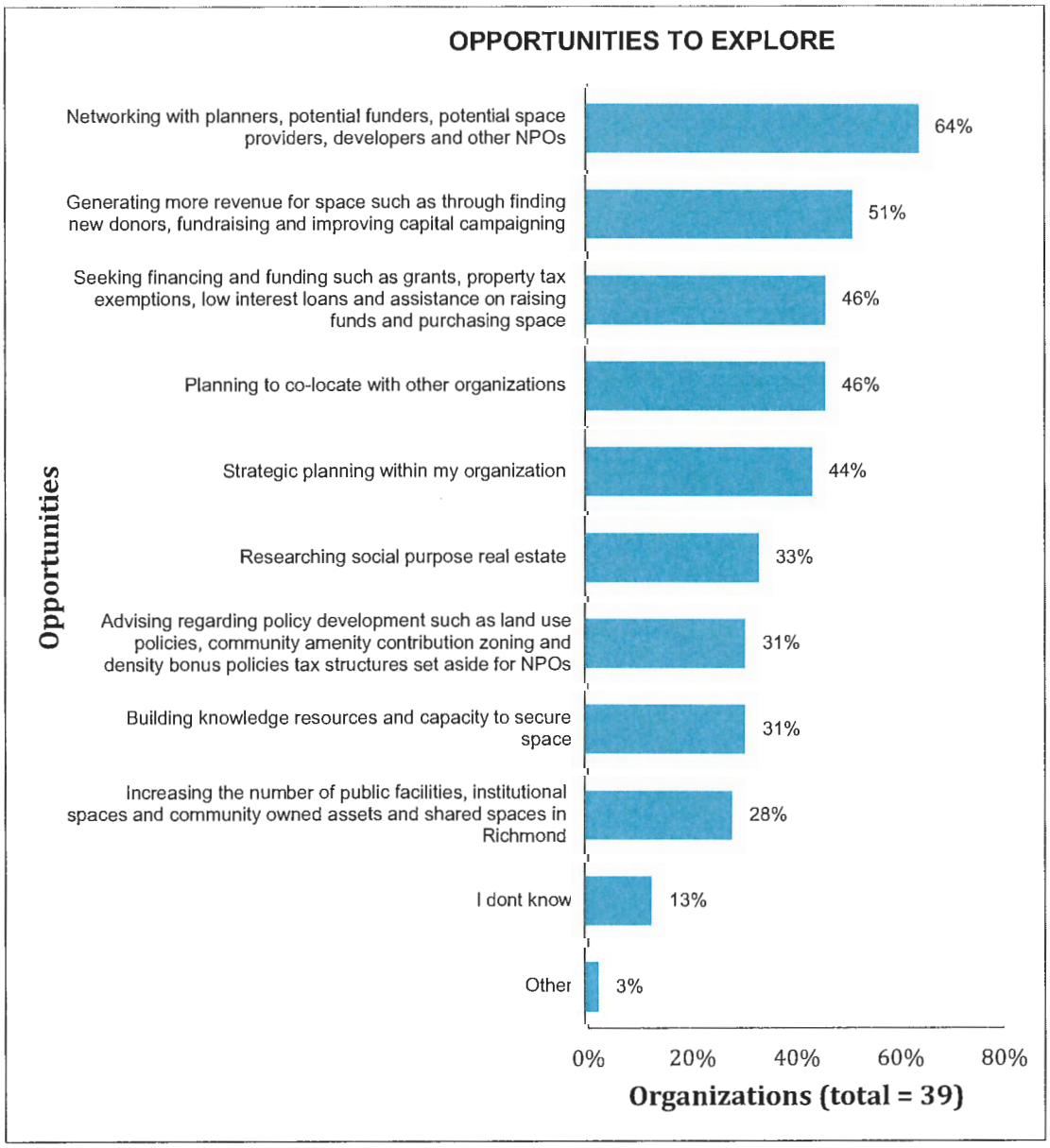
Highlights from the responses to Q: The strategies or approaches my organization is planning to undertake in the next 5-10 years to respond to space challenges are:

1. No new strategies (8 comments)
2. Diversify revenue streams (6 comments)
3. Fund Development Plan (6 comments)
4. Grow the organization (5 comments)
5. Partnerships (5 comments)
6. Work with the City of Richmond (4 comments)
7. Colocation (2 comments)
8. Renovate space (2 comments)
9. Work from home (2 comments)
10. Relocate space (1 comment)
11. Restructure delivery model (1 comment)

OPPORTUNITIES

Highlights from the responses to Q: What are the opportunities my organization is interested in exploring associated with securing or maintaining space in the next 5 - 10 years?

- 64% of respondent NPOs identify networking with planners, potential space providers, developers and other NPOs.
- 51% of respondent NPOs identify generating more revenue for space through finding new donors, fundraising and improving capital campaigning.
- 46% identified seeking financing and funding such as grants, property tax exemptions, low interest loans and assistance on raising funds and purchasing space.
- 46% identified planning to co-locate with other organizations.



SUGGESTIONS FOR NPO SUPPORTERS

Highlights from the responses to Q: What are the main suggestions my organization has for funders, advocacy groups and/or governments to assist us in achieving affordable, suitable and secure space?

1. Increase government funding (5 comments)
2. Increase supply of accessible spaces (4 comments)
3. Increase supply of affordable space (4 comments)
4. Increase supply of shared space (4 comments)
5. Improve tax exemptions (4 comments)
6. Engage NPOs (3 comments)
7. Update zoning bylaws (2 comments)

8. RECOMMENDATIONS

Considering the findings from the survey results and the initial goals of the study, NPOs, funders, agencies, and government officials may wish to consider the following initiatives outlined below.

NON-PROFIT OPPORTUNITIES

REVENUE & FUND DEVELOPMENT PLANNING

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

Organizations also indicated interest in creating "fund development plans" which are sub-plans of a Strategic Plan that outline how the organization will secure funding to carry out the strategic plan, how the fund development process unfolds and people's responsibility for and ownership over philanthropy.

There is the opportunity for NPOs to learn how they can branch into revenue generating opportunities, or alternative business models that may combine funding and campaigning with self-sufficient financial generation and develop Fund Development Plans that explore diverse and alternative revenue streams to acquire or procure space, including grants and subsidies from all levels of government, private funders and partnerships with private companies.

DATA COLLECTION AND DATABASE

One of the goals for this survey was to create a repeatable and comparable survey that can be administered at a regular interval to measure and better understand the space needs of Richmond NPOs. Important comparable measurements include collected data on total occupied space (square feet), monthly rent, annual space costs, facility costs, space security and rental/lease agreement type. Data collected over time could be a reliable source to measure the real estate situation facing the Richmond NPO sector periodically, and a database of NPO space needs information can be developed over time. This database could also include information such as: name of organization, contact information, primary activity (advocacy, housing, community or social service, etc.) and location.

BUILD KNOWLEDGE, RESOURCES & CAPACITY

Considering the limited space cost calculations completed by survey respondents and the interest in building knowledge, resources and capacity to secure space, many NPOs could benefit from learning more about real estate "basics", such as determining what their total occupied square footage is, or how much they pay on a dollar per square foot per year basis. This presents an opportunity for a knowledge building program, possibly provided by supporters such as funders, investors, and/or government officials, that could include in-person and online resources, tools and knowledge-sharing platforms. To start, it may be worth exploring a presentation or workshop on the findings of the Richmond NPO Social Purpose NPO Space Needs Review.

PARTNERSHIPS

Organizations indicated interest in and opportunities to partner with other social purpose organizations/agencies to advocate for the creation of affordable, suitable spaces from the City of Richmond and the private sector; to work together to create and deliver tools that support the development of, and investment in real estate; provide more opportunities for leasing and renting; and increase the number of community-owned assets and shared spaces that better serve the community.

COLOCATION

Nearly half of respondents indicated that they already share space, and other respondents indicated that they would consider co-locating. In addition, most respondents require more space, especially meeting rooms, staff rooms and flex program rooms. Some respondents indicated that they are addressing their space challenges by exploring co-location opportunities, building relationships with like-minded organizations, or seeking partners and funders. There were a number of respondents who suggested the

need for more availability of co-location and community hub spaces, or for more co-location development projects be introduced by the local government. These results present an opportunity to explore ways of making more shared space and co- location opportunities available for NPOs. To start, it may be worth exploring the establishment of an online information system or in-person colocation collaborative to communicate across NPOs who are interested in co-locating.

NON-PROFIT OWNERSHIP

In some cases, NPOs are able to raise and leverage the capital necessary to purchase a building and develop a multi-tenant non-profit centre. Often, a new non-profit corporation is created with the purpose of operating and managing the shared space. Space is leased to tenant organizations and, in some cases, short-term rental of other spaces (such as meeting rooms and gallery space) is made available to the broader community.[61] This requires a significant amount of financial investment for purchase, renovation, and operations. There is an opportunity for NPOs to pursue intensive capital campaigns, private investment, fundraising and loans in order to purchase a building if needed.

LOCAL GOVERNMENT OPPORTUNITIES

SOCIAL DEVELOPMENT PLANS

Many respondents indicated strong support for the expansion of a social development plan that specifically targets the space needs of NPOs. The City of Richmond currently has a social development framework in place that could be amended or updated to focus on the space needs of the nonprofit sector, as identified in Actions 29 to 32. These actions present an opportunity for an updated social development plan that establishes clear goals, targets and strategies that support nonprofit organizations in providing their programs and services and ensuring they have adequate, appropriate and affordable space to do so.

DEVELOPMENT PLANS AND REGULATIONS

Some respondents indicated support for local government to update its development plans and regulations to create clear goals, targets and strategies that ensure NPOs are considered with the new supply of space. For example, an updated Official Community Plan (OCP) and neighbourhood plans can provide decision makers with the guidelines and tools needed to proactively create space for NPOs. In the Richmond OCP, there could be an emphasis on facilitating the provision of space for community agencies. For example, in the existing Richmond City Centre Area Plan (2009), implementation policies can be expanded to include the development of social purpose real estate, including shared and co-located spaces.

MUNICIPAL GRANT PROGRAMS

Some respondent NPOs identified City funded grants and other forms of public funding as crucial to their operations. The City of Richmond's current grant program assists Richmond-based community groups to provide programs to residents, to build community and organizational capacity to deliver programs, and to promote partnerships and financial cost sharing. Groups can receive funding in the following program areas: health, social and safety; parks, recreation, and community events; and arts and culture. There is the potential to add or integrate social purpose real estate into the existing program areas.

COMMUNITY AMENITY CONTRIBUTION OR DENSITY BONUSING POLICIES

Community amenity contribution or density bonusing policies can support NPO access to space. Municipalities can require or negotiate a community benefit contribution as part of a project that involves rezoning in return for the increase in land value that the developer gains. Given the importance of below-market space, or space donated and leased at nominal rates to NPOs in Richmond, there is an opportunity to consider updating or developing new policy so that community amenity contributions include affordable social purpose facilities or space for NPOs that benefit a neighbourhood.

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[61] The City of Edmonton. Edmonton Non-profit Shared Space Feasibility Toolkit. Accessed June 5, 2018. https://www.edmonton.ca/programs_services/documents/PDF/Non-profit-SharedSpace-Toolkit.pdf

In addition to requiring affordable housing and child care contributions from major project rezonings for the City's Child Care Reserve Funds, the City could also consider establishing community amenity zoning or density bonus contributions from major project rezonings to be allocated to affordable social purpose facilities or NPO space. This would assist with establishing social purpose facilities and spaces in private or public developments and in acquiring sites for lease. The design of appropriate social purpose space can be further enhanced with design guidelines that outline standards required by non profits for the delivery of their services.

UPDATE TAX EXEMPTIONS

The City of Richmond's Property Tax Exemption Policy allows the City to provide property tax exemptions to churches, private schools, hospitals. Charitable property tax exemptions are also allowed for properties where an NPO is using a municipal building as a licensee or tenant.[62] Survey respondents identified an opportunity to improve the tax exemption process for NPOs by clarifying and streamlining the exemption process. This may be as simple as improving the accessibility of resources for NPOs or restructuring the process for accessing exemptions. Additionally, many NPOs pay market rent in private properties and could also be given a tax receipt in lieu of below-market rents. For those who own or pay market rents, property tax deferral and forgiveness is another way NPOs can benefit and avoid barriers to secure and affordable space. This allows those with large property tax bills to defer payments or have the property tax payments forgiven.

USE OF PUBLIC SPACE AND FACILITIES

Many survey respondents identified the importance of accessing free space or space leased/rented at nominal rates. The City of Richmond has planned and developed City-owned land for lease at nominal rates to NPOs, often for child care facilities. There is an opportunity for the City and the School District to create clear policies on NPO use of public facilities and properties, with expanded strategies for NPOs such as a lease grant program that rents City-owned or school district land and spaces to eligible agencies at significantly reduced rates, guidelines around leasing community facilities on an ongoing basis to NPOs that provide social benefits or additional support for co-located spaces and service hubs. Survey respondents indicated support for further investment in the development of shared or co-located spaces and service hubs, like the "Caring Place", to enable complimentary or like-minded service providers to work together, collaborate on space needs and to improve convenience and community access.

CASE STUDY[63]

Richmond Caring Place (Caring Place) is a 35,000 sq/ft space that has supported dozens of non-profit and mission-based organizations under one roof since it opened its doors in 1994.[64] The simplicity of Richmond Caring Place' purpose has allowed this multi-tenant space to thrive as a hub for the streamlined delivery of many social services. The Caring Place was built to house non-profit social service agencies. Currently, Caring Place supports 12 non-profits by overseeing the operational and administrative responsibilities of a building, enabling organizations to focus on the delivery of their programs and services. A legacy of experienced Board Members continues to drive the Caring Place to emphasize the provision of a well-managed and maintained building offering security of tenure for non-profit organizations.

RCP benefitted from the availability of City owned land and a corresponding agreement with the City of Richmond to lease that land. The land lease was also the impetus for private donations, as it demonstrated support by the City of Richmond for the need and viability of the project.

The Richmond Caring Place Societies ability to open the Richmond Caring Place debt free is one of the reasons why the continued operation and maintenance of the space has been "relatively easy". The absence of a mortgage or tax implications has enabled the Society to focus revenue on creating a beautiful, impactful space for both users and service providers.

FUNDING & FINANCING (1995)

[62] City of Richmond. Building Our Social Future – A Social Development Strategy for Richmond 2013-2022, 2013

[63] Social Purpose Real Estate. Case Studies / Space Profiles. Retrieved June 7, 2018. https://www.socialpurposerealestate.net/content/richmond-caring-place-0

[64] Richmond Caring Plan Society. About Us. http://www.richmondcaringplace.ca/aboutus/. Retrieved April 13, 2018

Revenue:

- $1,500,000 – Land (In-kind contribution by City of Richmond)
- $1,650,000 – Capital Campaign
- $1,000,000 – Private Donation
- $750,000 – City of Richmond (cash contribution)
- $300,000 – City of Richmond (development cost waivers)
- $5,200,000 – Total Revenue

Expenses:

- $1,500,000 – Land (In-kind contribution by City of Richmond)
- $3,700,000 – Hard and Soft Construction Costs[8]
- $5,200,000 – Total Expenses

PRIVATE SECTOR OPPORTUNITIES

COLOCATION OR SHARED SPACE

Leasing and sub-leasing space from a private building owner is a shared space model. In such cases, a private owner (usually a real estate or development company) leases space to an anchor tenant or third party management organization. This organization, in turn, sub-leases to other non-profit tenant organizations and also manages the short-term rental of spaces such as meeting rooms and conference facilities. There is an opportunity for private building owners to lease/rent space to NPOs in Richmond.

CASE STUDY[65]

The Centre for Social Innovation (CSI) is a shared space in downtown Toronto which houses more than 100 organizations, projects, and individual social innovators.

Tonya Surman of the Commons Group and Margie Zeidler of Urbanspace Property Group came together in 2003 to envision a shared space for the social mission sector in Toronto. The Robertson Building is owned by Urbanspace Property Group and two floors are leased to the Centre for Social Innovation. Urbanspace paid for the leasehold improvements and the Ontario Trillium Foundation and the Harbinger Foundation also contributed with core operating grants to assist with start-up and operational costs. The Centre for Social Innovation is incorporated as a non-profit and is the primary leaseholder with Urbanspace. CSI serves as a third-party operator and sub-leases space to non-profit and other mission-based organizations. The landlord (Urbanspace) has no legal relationship with the sub-tenants. The initial 5% rent subsidy from Urbanspace to CSI has been normalized over the past 5 years.

The CSI also has a core staff of 7 people dedicated to animating the "shared space community" and providing opportunities for learning. From formal capacity building workshops to informal social mixers and open-space style message walls, the staff animates the community and provides the conditions for interaction, collaboration and learning.

PARTNERSHIPS BETWEEN NPO AND BUSINESS

Partnerships between NPOs and private sector organizations can be a way to strengthen the delivery of services to communities. Survey respondents indicated interest in partnering with the private sector to create and deliver tools that support the development of, and investment in social purpose real estate, to increase the supply of space that can be leased and rented and to increase the supply of community-owned assets and shared spaces that better serve the community. The private sector can partner with NPOs to assist them with securing the right space by increasing the supply of suitable space, by providing sponsorship, grants, space-related support, arrangements for discounted or pro-bono services and space, joint program delivery models, community engagement and advocacy and promotions for NPO needs.

[65] The City of Edmonton. Edmonton Non-profit Shared Space Feasibility Toolkit. Accessed June 5, 2018. https://www.edmonton.ca/programs_services/documents/PDF/Non-profit-SharedSpace-Toolkit.pdf

GRANTS AND FINANCIAL COUNSELLING Support from financial institutions for NPO programs, services and operations can come in the form of community grants, financial sponsorship, financial literacy programs and reduced or nominal rates for services. There is an opportunity for financial institutions in Richmond to more strategically work with local community-based NPOs to increase their financial literacy, to develop Fund Development Plans and to access grants and sponsorship where available.

9. CONCLUSIONS

The Richmond Non-Profit Social Purpose Space Needs Review has done its best to assess social purpose non-profit organizations space needs in Richmond. RCSAC will inform NPOs on the results of the Review and with this, increase understanding of both the challenges and opportunities NPOs face in accessing secure, affordable and appropriate space. RCSAC also aims to conduct ongoing monitoring of NPO space needs and will work with its member NPOs to determine what strategies they can take in moving forward to address their challenges and build upon their strengths and assets.

APPENDIX A: BACKGROUND RESEARCH & MARKET ANALYSIS REFERENCES

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APPENDIX B: SURVEY

Introduction

Richmond Not-For-Profit Space Needs Review

We invite not-for-profit organizations (NPOs) based in Richmond and/or serving Richmond residents with social services to complete the Richmond NPO Space Needs Survey!

Richmond is home to many NPOs that deliver essential social services to residents. NPOs depend on access to quality spaces that are affordable, located in appropriate neighbourhoods and secure.

The Richmond Community Services Advisory Committee, an advisory body to Richmond City Council on social, health and community matters, has launched a Richmond NPO Space Needs Review to understand the real estate needs and challenges affecting not-for-profits operating social services in Richmond and to guide planning and action for the future.

We need your help to understand your community, office, retail, and industrial space needs, challenges and opportunities so that we can build a clearer picture of social purpose real estate in Richmond. Social purpose real estate is any space/facility owned, rented and/or operated by non-profit/charitable organizations and social enterprises for the purpose of community benefit. Survey results will help the Committee provide advice regarding future policy development and make the case for supporting social purpose real estate in Richmond. Please help us by completing this survey and you will be entered to win a $100 VISA card!

Please complete the survey by March 30, 2018.

Section 1: About Your Organization

To start, we would like to learn about your organization and the populations you serve in Richmond to get a snapshot of current and future demand for your programs and services.

1. My organization's name is:_____

2. In case we need to verify or clarify any information, please provide your name and contact information:
   - O Contact person: _____
   - O Role/title: _____
   - O Email address: _____

3. My organization is a: Check all that apply.
   - O Registered not-for-profit
   - O Registered charity
   - O For-profit entity
   - O For-profit social enterprise
   - O Not sure
   - O Other:_____

4. My organization primarily serves the following population(s) in Richmond: Check all that apply.
   - O Children
   - O Youth
   - O Families
   - O Seniors
   - O Immigrants/ Refugees
   - O Individuals experiencing homelessness
   - O Individuals experiencing housing challenges
   - O Indigenous communities
   - O Linguistic oriented group
   - O Multicultural individuals
   - O LGBTQ2 communities
   - O Individuals with disabilities
   - O Individuals with mental health concerns
   - O Individuals with physical health concerns
   - O Individuals with substance use/misuse or addictions
   - O Individuals and families with low income
   - O Survivors of abuse
   - O People who are unemployed or precariously employed
   - O General population
   - O Other: ___

5. My organization primarily serves the following age range(s) of people in Richmond: Check all that apply.
   - O Under 12 years old
   - O 12-17 years old
   - O 18-24 years old
   - O 25-34 years old
   - O 35-44 years old
   - O 45-54 years old
   - O 55-64 years old
   - O 65-74 years old
   - O 75 years or older

6. The majority of my organizations clients / users come from:
   - O Specific neighbourhood(s) in Richmond (check all that apply on the map)
     - o Blundell
     - o Bridgeport
     - o Broadmoor
     - o Sea Island
     - o City Centre
     - o East Cambie
     - o East Richmond
     - o Hamilton
     - o Shellmont
     - o Steveston
     - o Thompson
     - o West Cambie
   - O Richmond city-wide
   - O Metro Vancouver

- O Province-wide
- O Canada-wide
- O Not sure

7. My organization's main area(s) of focus in 2018 is:
   - O Advocacy
   - O Arts and culture
   - O Child care
   - O Youth
   - O Women
   - O Seniors
   - O Families
   - O Community development
   - O Settlement services
   - O Education
   - O Employment
   - O Training
   - O Animal rights
   - O Energy
   - O Environment
   - O Food Security
   - O Health
   - O Mental health/Addictions
   - O Housing
   - O Homelessness
   - O Poverty reduction
   - O Human rights
   - O Legal services
   - O Religion/Faith
   - O Recreation/Sport
   - O Transportation/Mobility
   - O Waste management
   - O Other: ___

8. This fiscal year (April1, 2017 to March 31, 2018), my organization will:
   - O Add programs or services (please explain why)
   - O Expand programs or services (please explain why)
   - O Remove programs or services (please explain why)
   - O Reduce programs or services (please explain why)
   - O Maintain programs or services (please explain why)
   - O I don't know

9. This fiscal year (April 1, 2017 through to March 31, 2018), my organization will serve the following estimated number of clients or users in Richmond:
   - O 0 – 50
   - O 51 – 100
   - O 101 – 250
   - O 251 – 500
   - O 501 – 750
   - O 751 – 999
   - O 1,000 – 4,999
   - O 5,000+

10. How important is it that my organization remains in Richmond?
    - O Very important
    - O Somewhat important
    - O Not very important
    - O Not important at all
    - O Not sure
    - O Other (please explain)

Section 2: Human Resources

Next, we want to understand your needs for personnel who serve Richmond (even if they also serve other areas), and how this impacts your space needs.

11. How many people work in all of my organization's community, office, retail and industrial spaces in an average week?

	NA	1-2	3-5	6-10	11-20	21-50	51-100	Other
Full-time employees	o	o	o	o	o	o	o	___
Part-time employees (less than 30 hours/week)	o	o	o	o	o	o	o	___
Contract workers	o	o	o	o	o	o	o	___
Volunteers	o	o	o	o	o	o	o	___

12. What percentage of full time and part time employees work in an average week:
    a. On site?
        - O 0 – 25%
        - O 26 – 50%
        - O 51 – 75%
        - O 76 – 100%
    b. From home because there is no room on site and not out of choice?
        - O 0 – 25%
        - O 26 – 50%
        - O 51 – 75%
        - O 76 – 100%

13. Number of employees and volunteers who may be working with my organization over the next 5 - 10 years will:
    - O Increase
    - O Decrease
    - O Stay the same
    - O Not sure

Section 3: Space Needs

Next, we want to understand your organization's current space needs in Richmond. This will help us compile an inventory of NPO space demands in Richmond.

14. My organization operates the following number of sites (properties/units) in Richmond?
    _____

15. (If you answered none to the previous question), my organization wants to operate sites out of Richmond in the next 5 – 10 years?
    - O Yes. How many: _____
    - O No
    - O Maybe
    - O I don't know

16. My organizations current or future Richmond premises are or will be our:
    - O Sole location(s)
    - O Primary space or head office
    - O Branch/satellite office(s)

17. Do you currently share space with another organization in Richmond?
    - O Yes
    - O No

18. Please fill in the following information for each space your organization occupies in Richmond (including any shared community space that you use and excluding housing sites and child care facilities).

	Site #
Address:	
Size: What is the approximate size in total square footage of this space (excluding parking, housing sites and child care facilities)?	
Space type: My organization would describe this space as:	o Office building o Commercial/retail o Religious building (e.g., church, mosque, temple) o Public/community facility o Institutional building (e.g., school, college, hospital) o Light industrial/warehouse o Heavy industrial / production o Multi-use building o Co-work/shared space o Home office o Do not have dedicated space o Other: _____
Satisfaction: How much does this space meet my organizational needs?	o Very satisfactory o Somewhat satisfactory o Neutral o Not very satisfactory o Not at all satisfactory
Tenure: What type of tenure does my organization have?	o Owns o Rents from government o Rents from the private sector o Leases from government o Leases from the private sector o Sub-leases from another organization o Pays below-market rates o Uses space that is subsidized

	o Uses space that is donated at no cost o Other: _____
Security: How secure is my organizations space for the next 5 - 10 years (i.e. confidence in ability to renew lease or maintain space)?	o Very secure o Somewhat secure o Not very secure o Not secure at all o Not sure
Security: Does my organization need to move in the coming years?	o Yes, within the next 2 years o Yes, within the next 5 years o Yes, within the next 10 years o Yes, in over 10 years o No, we will not need to move o Not sure
Security: If yes, why will my organization need to move in the coming years?	o Adding/expanding/growing programs and services o Reducing/removing programs or services o Changing location and needs of clients/users o Rental/lease expiration o Financing o Other_____

If lease/rent, my organizations average total monthly total costs are:	o Can provide total only: ____
	o Can provide breakout:
	  o Base rent or lease payment: ___
	  o Utilities (excluding phone, cable, security, cleaning): _____
	  o Maintenance: ____
	  o Taxes: ____
	  o Facility reserve funds: ____
	  o All-in rent: _____

If lease/rent, the term/length of my organizations lease/rental agreement is:	o No written rental agreement o Month-to-month o Less than a year o Between 1 and up to 2 years o Between 2 and 5 years o Between 5 and 10 years o More than 10 years o Not applicable o Other: _____
If lease/rent, my organizations agreement terms or restrictions are: (such as a redevelopment clause, limited operating hours, demolition clause etc.)? (Optional)	

If own, my organizations monthly expenses (including mortgage payment) are on average:	o Can provide total only: ___
	o Can provide breakout:
	  o Mortgage payment: ___
	  o Utilities (excluding phone, cable, security, cleaning): _____
	  o Maintenance: ____
	  o Taxes: ___
	  o Facility reserve funds: ___
	  o Total monthly costs: ___

19. My organizations current space (or lack of space) has limited or inhibited our ability to offer programs and services:
    - O Yes. _____ (please explain)
    - O No

20. If owning, my organization would consider redeveloping any of our sites to better meet our needs?
    - O Yes
    - O No
    - O Maybe

21. Within the next 5 - 10 years, my organization's space will need to:
    - O Decrease
    - O Stay the same
    - O Expand (increase space)
    - O Add (an additional location in Richmond)
    - O Relocate to same sized premise
    - O Relocate to larger premises (it is not possible to expand at current site)

22. If my organization has plans to grow its space in the next 5 - 10 years, why and how much additional space is needed (provide estimated number of sites and square footage per site)?

23. If relocating or opening another premise is necessary in the future, my organization will need the following number of sites:
    - O Dedicated space: ____
    - O Shared space: _____
    - O Not applicable

24. In a future move or expansion, my organization would consider:
    - O Buying a single building space for your own organization
    - O Buying a space within a multi-tenant building
    - O Renting / leasing a single building space for your own organization
    - O Renting / leasing a space within a multi-tenant building
    - O Co-locating with other organizations
    - O Co-working / community spaces
    - O Locating in a community hub
    - O None of these

25. If relocating or opening another premise is necessary in the future, my organization would want to be in:
    - O Blundell
    - O Bridgeport
    - O Broadmoor
    - O City Centre
    - O East Cambie
    - O East Richmond
    - O Hamilton
    - O Shellmont
    - O Steveston
    - O Thompson
    - O West Cambie
    - O Outside Richmond
    - O Outside Metro Vancouver
    - O None of these

26. The type(s) of space my organization will need in the future are:
    - O Waiting room/reception
    - O Open offices
    - O Private offices
    - O Space to store confidential files
    - O Space for printing/photocopying
    - O Mail room
    - O Purchasing room
    - O Board rooms
    - O Multi-purpose / activity rooms
    - O Workshop / training rooms
    - O Meeting rooms
    - O Staff/lunch rooms
    - O Kitchen
    - O Program space
    - O Gallery / exhibition space
    - O On-site daycare
    - O Technical support space
    - O Outdoor space (e.g., play area, park)
    - O Warehouses

- O Storage rooms
- O Car parking
- O Bike parking
- O Pick-up / drop-off space
- O Other: _____

27. Please rank the most important factors my organization considers when choosing space.

Consideration	Not considered	Not very important	Neutral	Important	Very important
Location	O	O	O	O	O
Proximity to clients/users	O	O	O	O	O
Proximity to related organizations	O	O	O	O	O
Proximity to personnel	O	O	O	O	O
Signage/ branding potential	O	O	O	O	O
Features of space	O	O	O	O	O
Parking	O	O	O	O	O
Proximity to transit	O	O	O	O	O
Cycling access and facilities	O	O	O	O	O
Accessibility	O	O	O	O	O
Ground floor access and space	O	O	O	O	O
Secure or long-term leasing agreement	O	O	O	O	O
Landlord flexibility	O	O	O	O	O
Rent rates	O	O	O	O	O
Ability to vacate / exit	O	O	O	O	O
Exclusive use of premise	O	O	O	O	O
Ability to share premises with other organizations	O	O	O	O	O
Adequate size of space	O	O	O	O	O
Child friendly space	O	O	O	O	O
24 hour access to premises	O	O	O	O	O
Length of commitment	O	O	O	O	O
Availability for purchase	O	O	O	O	O
Availability for lease	O	O	O	O	O
Dedicated outdoor space	O	O	O	O	O
Kitchen / food space	O	O	O	O	O

28. The major building components, features or amenities that are important to my organization that we do not currently have access to are: (max. 200 characters) _____

Section 4: Finances

Next, we want to learn about your organization's financial situation to understand your ability to sustain your current space needs, and to consider expanding into new spaces.

29. This fiscal year (April 1, 2017 to March 31, 2018), my organization has to work with the following approximate budget:
    - O Less than $250K
    - O $250K - $500K
    - O $500K - $750K
    - O $750K - $1M
    - O $1M - $2.5M
    - O $2.5M - $5M
    - O $5M - $7.5M
    - O $7.5M+

30. This fiscal year (April 1, 2017 to March 31, 2018), my organizations total annual expenses/operating costs are: _____

31. The approximate per cent of my organization's annual expenses/operating costs go towards the following (fill in what you can):
    - O Mortgage _____
    - O Rent / Lease _____
    - O Building Maintenance _____
    - O Building Renovations _____
    - O Property Taxes _____
    - O Capital Expenditures _____

32. My organization is currently paying more / less or the right amount for space relative to what we can afford?
    - O More
    - O Less
    - O Right amount

33. My organizations maximum monthly cost that we can afford and could spend on space-related costs is: (this could be triple-net rent, all-in rent or total costs including mortgage payment, utilities, maintenance, and taxes) _____

Section 5: Challenges & Opportunities

Lastly, we want your help identifying key challenges and opportunities to the delivery of affordable, appropriate, accessible and secure space for social service NPO's in Richmond.

34. The main challenges my organization faces in securing affordable and suitable space are: (max. 200 characters)_____

35. The strategies or approaches my organization is planning to undertake in the next 5-10 years to respond to space challenges are: (max. 200 characters) _____

36. The opportunities my organization is interested in exploring associated with securing or maintaining space in the next 5 - 10 years are: (check all that apply)
    - O Strategic planning within my organization
    - O Planning to co-locate with other organizations
    - O Networking with planners, potential funders, potential space providers, developers, other NPO's and so on.
    - O Researching social purpose real estate
    - O Building knowledge, resources and capacity to secure space (such as with site selections, capital investment plans, due diligence, management approaches, decisions about tenure, and maintenance schedules). (please explain)
    - O Advising regarding policy development (such as land use policies and regulations, social development infrastructure plans, municipal community amenity contribution zoning and density bonus policies, tax structures, set-asides for not-for-profits in commercial developments, not-for-profit enterprise zones etc.). (please explain)
    - O Seeking financing and funding (such as grants, property tax exemptions, low-interest loans and assistance on raising funds and purchasing space). (please explain)
    - O Generating more revenue for space (such as through finding new donors, fundraising, and improving capital campaigning). (please explain)
    - O Increasing the number of public facilities, institutional spaces and community-owned assets and shared spaces in Richmond. (please explain)
    - O None of the above
    - O Other: ____

37. The main suggestions my organization has for funders, advocacy groups and/or governments to assist us in achieving affordable, suitable and secure space are: (max. 200 characters and optional)
    _____

APPENDIX C: SURVEY SUMMARY TABLES

My organization is a .. (check all that apply)		
Registered Not-for-profit	32	82%
Registered Charity	28	72%
Other	1	3%

My organization primarily serves the following population(s) in Richmond (check all that apply)		
Linguistic oriented group	4	10%
Other	4	10%
Individuals experiencing housing challenges	10	26%
Survivors of Abuse	10	26%
Individuals experiencing homelessness	11	28%
Individuals with substance use/misuse or addiction	11	28%
Indigenous communities	12	31%
LGTBQ2 communities	12	31%
Individuals and families with low income	12	31%
Individuals with physical health concerns	13	33%
People who are unemployed or precariously employed	13	33%
Immigrant Refugees	15	38%
Multicultural individuals	15	38%
General population	17	44%
Seniors	18	46%
Individuals with disabilities	18	46%
Individuals with mental health concerns	18	46%
Youth	19	49%
Children	23	59%
Families	25	64%

My organization primarily serves the following age range(s) of people in Richmond (check all that apply)		
10 and under	23	59%
11-19	29	74%
20-29	32	82%
30-39	33	85%
40-49	33	85%
50-59	33	85%
60-69	32	82%
70+	27	69%
All	14	36%

Most of my organizations clients/users geographically live/commute from		
Richmond citywide	33	85%
Metro Vancouver	10	26%
Specific Neighbourhoods in Richmond	3	8%
Province-wide	2	5%
Canada-wide	2	5%
I dont know	1	3%

Check all that apply	
Blundell	2
Bridgeport	2
Broadmoore	2
Sea Island	2
City Centre	2
East Cambie	3
East Richmond	2
Hamilton	2
Shellmont	2
Steveston	2
Thompson	2
West Cambie	2

My organization's main area(s) of focus in 2018 are (check all that apply)		
Transportation & Mobility	1	3%
Religion/Faith	1	3%
Legal services	3	8%
Arts and culture	3	8%
Human rights	4	10%
Settlement services	5	13%
Recreation/Sport	5	13%
Poverty reduction	5	13%
Food security	5	13%
Child care	6	15%
Education	7	18%
Other	8	21%
Housing	8	21%
Homelessness	8	21%
Women	10	26%
Training	10	26%
Employment	10	26%
Community development	10	26%
Advocacy	10	26%
Mental health & Addictions	11	28%
Seniors	12	31%
Health	12	31%
Youth	14	36%
Families	19	49%

This fiscal year (April 1, 2017 to March 31, 2018) my organization has/will:		
Add programs or services	9	23%
Expand programs or services	10	26%
Maintain programs or services	19	49%
I dont know	1	3%

This fiscal year (April 1, 2017 through to March 31, 2018), my organization has / will serve the following estimated number of clients or users in Richmond		
# Clients / Users	**Org. #**	**% Respondents**
0-50	1	3%
51-100	5	13%
101-250	4	10%
251-500	8	21%
751-999	1	3%
1000-4999	11	28%
5000+	8	21%
I dont know	1	3%

How important is it that my organization remains in Richmond	
Very important	35
Somewhat important	3
Other	1

The approximate percentage of my organization's annual expenses and operating costs go towards the following (check all that apply and then fill out amounts in the fields that appear below):	
Rent or Lease	24%
Building Maintenance	10%
I don't know	8%
Building Renovations	5%
Mortgage	3%
Property Taxes	4%
Capital Expenditures	4%

My organization is currently paying more / less or the right amount for space relative to what we can afford?	
Right amount	28
More	7
I don't know	3
Less	1

This fiscal year (April 1, 2017 to March 31, 2018), my organization has / will work with the following approximate budget:	
Less than 250K	10
250K - 500K	3
500K - 750K	4
750K - 1M	3
1M - 2.5M	9
2.5M- 5M	2
7.5M +	5
I don't know	2

The opportunities my organization is interested in exploring associated with securing or maintaining space in the next 5 to 10 years are (check all that apply):		
Other	1	3%
I don't know	5	13%
Increasing the number of public facilities, institutional spaces and community owned assets and shared spaces in Richmond	11	28%
Building knowledge resources and capacity to secure space	12	31%
Advising regarding policy development such as land use policies, community amenity contribution zoning and density bonus policies tax structures set aside for NPOs	12	31%
Researching social purpose real estate	13	33%
Strategic planning within my organization	17	44%
Planning to co-locate with other organizations	18	46%
Seeking financing and funding such as grants, property tax exemptions, low interest loans and assistance on raising funds and purchasing space	18	46%
Generating more revenue for space such as through finding new donors, fundraising and improving capital campaigning	20	51%
Networking with planners, potential funders, potential space providers, developers and other NPOs	25	64%

*If you answered none to the previous question. My organization wants to operate sites in Richmond in the next 5 to 10 years		
Yes	6	55%
No	2	18%
Maybe	2	18%
I don't know	1	9%

Number of sites in Richmond		
0 sites	5	13%
1 site	18	46%
2 sites	9	23%
3 to 10 sites	7	18%

My organization currently shares space with another organization in Richmond		
Yes	18	47%
No	20	53%

My organization's current or future Richmond premises are or will be our:		
Sole locations	15	39%
Primary space or head office	12	32%
Branch/satellite offices	8	21%
I don't know	1	3%
Other	2	5%

Space type: My organization would describe this space as:		
Other	3	8%
Home office	1	3%
Commercial building	2	5%
Institutional building	2	5%
Co-work or shared space	2	5%
Do not have dedicated space	2	5%
Religious building	3	8%
Public or community facility	17	44%
Multiuse building	11	28%
Office building	13	33%
Light industrial or warehouse	1	3%

Satisfaction: How much does this space meet my organization's needs?		
Very satisfied	8	22%
Somewhat satisfied	18	50%
Neutral	1	3%
Not very satisfied	9	25%

Tenure: What type of tenure does my organization have?		
Uses space that is subsidized	1	3%
Rents from government	2	5%
Leases from government	2	5%
Other	2	5%
Rents from the private sector	3	8%
Subleases from another organization	3	8%
Pays below market rates	3	8%
Owns	4	10%
Leases from the private sector	7	18%
Uses space that is donated at no cost	9	23%

Security: How secure is my organization's space for the next 5 to 10 years (i.e. confidence in ability to renew lease or maintain space)?		
Very secure	13	35%
Somewhat secure	13	35%
Not very secure	3	8%
Not secure at all	4	11%
I dont know	4	11%

Security: Does my organization need to move in the coming years?		
Within the next 2 years	6	16%
Within the next 5 years	2	5%
Within the next 10 years	1	3%
We will not need to move	15	41%
I dont know	13	35%

Security: If yes, why will my organization need to move in the coming years?		
Adding/expanding/growing programs and services	5	26%
Reducing/removing programs or services	1	5%
Changing location and needs of clients and users	1	5%
Rental/lease expiration	5	26%
Financing	1	5%
I don't know	1	5%
Other	5	26%

If Leasing/Renting: The term/length of my organization's lease/rental agreement is:		
Other	2	7%
Less than a year	2	7%
Between 5 and 10 years	2	7%
More than 10 years	2	7%
Not applicable	2	7%
Month to month	2	7%
Between 2 and 5 years	6	22%
Between 1 and up to 2 years	9	33%

My organization's current space (or lack of space) has limited or inhibited our ability to offer programs and services:		
Yes	24	62%
No	15	38%

If owning, my organization would consider redeveloping any of our sites to better meet our needs?		
Yes	7	39%
No	4	22%
Possibly	3	17%
I don't know	3	17%
Other	1	6%

Total ownership costs		
$10,000.00 - $19,999.00	1	20%
$20,000.00 - $29,999.00	2	40%
30,000.00 +	2	40%

Total monthly lease/rental costs		
$0 - $999.00	5	18%
$1000.00 - 1999.00	6	21%
$2,000.00 - $4,999.00	5	18%
$5,000.00 - $9,999.00	6	21%
$10,000 +	6	21%

Approximate Size of Organizations Space		
0 - 999 sq ft	20	34%
1000 - 1999 sq ft	5	9%
2000 - 2999 sq ft	12	21%
3000 - 3999 sq ft	4	7%
4000 - 4999 sq ft	6	10%
5000 - 9999 sq ft	6	10%
10,000 + sq ft	5	9%

Within the next 5 to 10 years, my organization's space will need to:		
Expand/increase space	11	28%
Stay the same	11	28%
I don't know	6	15%
Add an additional location in Richmond	5	13%
Relocate to larger premises it is not possible to expand at current site	4	10%
Relocate to same size	2	5%

In a future move or expansion, my organization would consider:		
Renting or leasing a space within a multitenant building	6	15%
Co-locating with other organizations	6	15%
Locating in a community hub	6	15%
I don't know	6	15%
None of these	4	10%
Buying a single building space for my own organization	3	8%
Coworking community spaces	3	8%
Other	3	8%

If relocating or opening another premise is necessary in the future, my organization would ideally be located in (check all that apply):		
Other	1	3%
Outside Richmond	1	3%
None of these	1	3%
Hamilton	1	3%
Outside Metro Vancouver	2	5%
Broadmoor	4	10%
East Cambie	4	10%
East Richmond	4	10%
Shellmont	4	10%
Thompson	5	13%
Blundell	6	15%
West Cambie	6	15%
Steveston	7	18%
I don't know	7	18%
Bridgeport	8	21%
City Centre	27	69%

The type(s) of space my organization will need in the future is / are (check all that apply):		
Warehouses	2	5%
Onsite daycare	3	8%
I don't know	3	8%
Other	4	10%
Gallery/exhibition space	4	10%
Mail room	4	10%
Technical support space	6	15%
Pickup/drop-off space	9	23%
Outdoor space (e.g. play area park)	11	28%
Bike parking	14	36%
Waiting room/reception	16	41%
Boardrooms	16	41%
Storage rooms	16	41%
Open offices	17	44%
Kitchen	17	44%
Staff/lunch rooms	19	49%
Meeting rooms	21	54%
Space to store confidential files	23	59%
Program space	23	59%
Car parking	24	62%
Private offices	25	64%
Space for printing/photocopying	25	64%
Workshop/training rooms	26	67%
Multi-purpose activity rooms	29	74%

The most important factors my organization considers when choosing space are (please rank):				
	Location	Proximity to clients/users	Proximity to related organizations	Proximity to personnel
I don't know	1	1	1	1
Not considered	0	0	0	2
Very important	28	28	12	4
Important	9	5	13	13
Neutral	0	3	10	13
Not important	0	2	2	3
Not very important	0	0	1	2

The most important factors my organization considers when choosing space are (please rank):						
	Signage/ branding potential	Features of space	Parking	Proximity to transit	Cycling access and facilities	Accessibility
I don't know	1	2	1	1	1	1
Not considered	2	0	0	0	1	0
Very important	6	21	18	28	5	28
Important	10	15	16	9	13	8
Neutral	11	1	2	1	14	1
Not important	5	0	2	0	4	1
Not very important	3	0	0	0	0	0

The most important factors my organization considers when choosing space are (please rank):					
	Ground floor access and space	Secure/long-term leasing agreement	Landlord flexibility	Rent rates	Ability to vacate/exit
I don't know	1	1	1	1	1
Not considered	0	3	4	3	3
Very important	15	19	13	26	8
Important	11	13	15	6	12
Neutral	10	2	5	3	12
Not important	2	0	0	0	2
Not very important	0	1	1	0	1

The most important factors my organization considers when choosing space are (please rank):					
	Ability to share premises with other organizations	Adequate size of space	Child friendly space	24 hour access to premises	Length of commitment
I don't know	1	1	1	1	1
Not considered	1	1	4	1	1
Very important	3	24	11	6	13
Important	15	13	13	13	20
Neutral	13	0	6	10	4
Not important	4	0	2	4	0
Not very important	2	0	2	4	0

The most important factors my organization considers when choosing space are (please rank):				
	Availability for purchase	Availability for lease	Dedicated outdoor space	Kitchen/food space
I don't know	1	1	1	1
Not considered	7	4	2	1
Very important	5	10	6	13
Important	6	14	9	15
Neutral	10	9	13	7
Not important	7	0	4	0
Not very important	3	1	4	2

Please MAKE A NEW COPY and complete this document to record your agency's office, program and meeting room space needs.
For the purposes of this survey, please do not include residential uses (e.g. affordable housing, shelters, group homes), child care space, school-based programs or parking needs. Please estimate size in square feet (SF).

Organization	Address	Current space size – see exclusions above (SF)	Current tenure (rent, lease or own)	Current Length of Tenure (e.g. 2-year lease)	Is your tenure secure (e.g. sufficiently renewable or long term)? Yes/No	Is your current space the right size? Yes/No	If not, how much additional space do you require (SF):		If needed, would you have sufficient funding for additional SF, based on current space costs? Yes/No/Unsure	Community impact of space loss or shortage (e.g. program, clients, numbers)	Other Comments (note special requirements e.g. warehouse, outdoor space)
							Now (e.g. in next 5 years)	Long term (e.g. in 10 – 15 years)			
AutismBC	3688 Cessna Dr.	750	Lease	2 years	no	no	100	250	unsure		Tenant of Pacific Austism Family Centre
Chimo											
Site 1: CHIMO	120 - 7000 Minoru Blvd.	2469	Lease	2-year lease	yes, Based on the Caring Place	no	2000	4000	yes	We served 16,000 unique clients last year across all our programs. Transition House, Secomd Stage Housing, Crisis Line, Settlement Services, Out reahc and Advocacy, Family law and Counselling	Store Front/Accessible/ workshop/meeting space/kitchen
Site 2: Counselling	310 - 7000 Minoru Bl	500	Lease	2-year lease	yes, Based on the Caring Place	no	500	1000	yes		Accessible and secure
Community Mental Wellness Assoc of Canada	250-5726 Minoru Blvd.	1500	Rent	month to month	no, redevelopment app. Is submitted	Yes			No	Relocation upheavel on redevelopment, interm space needs, impacts program attendance, clients, availablity of other programs	we require plenty of notice of redevelopment, we engage adults and seniors, people in recovery, we need elevator access, now only 18 stairs to 2nd level
Connections Community Services (new location)	110-5751 Cedarbridge Way	5100 sq ft	Lease	5 years	No (option to renew not included)	Yes, a little larger than we need			Unsure	Although we had to change offices the location relative to the skytrain and bus is approximately the same but the lack of parking in the area has impacted a number of our programs, especially the ones for seniors who find it difficult to get here.	The space is a bit larger than we need with respect to program space so we partnered with RMCS and rented them two program rooms (1465 square feet).
Family Services of Greater Vancouver	7000 Minoru Blvd.	1984	Lease	2-year lease	Yes	Yes			No	Community would lose low cost counselling for over 300 people per year. Community could lose over 100 sessions of parenting skills workshops	
Multicultural Helping House Society **Please note that this organization is undergoing significant administrative challenges and needs to stabilize prior to further consideration of space needs.**	4802 Fraser street, Vancouver (seeking a Richmond location)	n/a	no foot print	n/a	n/a	n/a	200 - 400 sf		unsure	MHHS will require new funding in order to expand services and justify an office and permenant footprint in Richmond. Our key activities with seniors and youth will continue to require space for activities	We currently have use of space for Zumba and other activities for seniors and youth on an adhoc and regular bases. We have submitted a proposal for 5 years funding with Federal Government (IRCC). With the approval of funding we would have satelite offices that are staffed to provide easier access to citizens of Richmond

Organization	Address	Current space size – see exclusions above (SF)	Current tenure (rent, lease or own)	Current Length of Tenure (e.g. 2-year lease)	Is your tenure secure (e.g. sufficiently renewable or long term)? Yes/No	Is your current space the right size? Yes/No	If not, how much additional space do you require (SF):		If needed, would you have sufficient funding for additional SF, based on current space costs? Yes/No/Unsure	Community impact of space loss or shortage (e.g. program, clients, numbers)	Other Comments (note special requirements e.g. warehouse, outdoor space)
							Now (e.g. in next 5 years)	Long term (e.g. in 10 – 15 years)			
Pacific Autism Family Centre Society	3688 Cessna Dr.	10000	Own						unsure	Property tax bill leading to $150,000 loss programing ability	Centre space also leased out to other business and government services. Tenants need more space, including one non-profit, Autism BC (see entry)
Pathways Clubhouse Society of Richmond	315-8111 Granville Avenue	11,000	Own	NA	Yes	Yes	15000	15000	Yes	Clients and programs	We are good with our current space at this moment. However, as our organization grows, we might be in need of adding some space in the future. Having less than what we have will impact us negatively in terms of clients and programs. Our size is just the right size, no more and no less.
RCRG											
Site 1: Richmond Cares, Richmond Gives	190-7000 Minoru Blvd.	1760 sq. ft.	Lease	2-year lease	Yes	No	200	400	No	It is hard to expand based on the needs of the community when there is not adequate space.	The Caring Place is great in terms of rent as well as location. However, the building is not built for offices. The walls are not straight with a lot of curve walls. The use of space is awkard.
Site 2: Childcare Resource and Referral Centre (CCRR)	325-7000 Minoru Blvd.	583 sq. ft.	Lease	2-year lease	Yes	No	340	500	No	This is the CCRR space and the challenge is the space requires staff and resources to be together. With a great library and resource room we would love to have space just for the library but we also need staff in the same area	Having the ability to have joint meeting room space has been great for big events, but with every organizations' programs and services growing in the building it is harder to plan ahead. We would like to add additional space not just for our programs but also a space dedicated for programs. CCRR runs many drop in programs in partnership but the ability to have a space dedicated for programs for family and children would be great.
Richmond Addiction Services Society											
Site 1: Richmond Addiction Services Society	105 - 8080 Anderson Rd.	2500	Lease	year 2 of 5	Yes	Yes			No	250 clients and 5000 community members for Community Prevention	
Site 2: FOUNDRY Richmond	currently looking			NA	NA	NO	8500-12000		Yes	Services unable to start for 2 years since 2017	Office and group room space - street level, with free parking
Richmond Centre for Disability	Unit 842-5300 No. 3 Road, Lansdowne Centre	5300 sq ft	Lease	5 years lease to December 2023	Yes, but we probably won't renew as we have plan to move in 5-year's time, current site will be re-developed in 10 years' time	Yes	OK now	2000 sq ft	No	There is great hindrance in program development, especially the ability to introduce new programming; also number of participants will be impacted when current programs can't be expanded to accommdate more people.	Storage space is always a problem, and we need accessible washrooms which is of higher cost and more space required. It is absurd that accessibility does come in a higher price.

Organization	Address	Current space size – see exclusions above (SF)	Current tenure (rent, lease or own)	Current Length of Tenure (e.g. 2-year lease)	Is your tenure secure (e.g. sufficiently renewable or long term)? Yes/No	Is your current space the right size? Yes/No	If not, how much additional space do you require (SF):		If needed, would you have sufficient funding for additional SF, based on current space costs? Yes/No/Unsure	Community impact of space loss or shortage (e.g. program, clients, numbers)	Other Comments (note special requirements e.g. warehouse, outdoor space)
							Now (e.g. in next 5 years)	Long term (e.g. in 10 – 15 years)			
Richmond Chinese Community Society	Unit 205-8271 Westminster Hwy	2300	Lease	5-year lease to Feb. 2023, no renewal option afterwards	No	No	3000 SF		Unsure	Currently we have over 200 seniors (age over 65). They will lose all the activities including birthday party, workshop health seminars. They are Chinese speaking and they will be difficult to find specific program (Chinese oriented) for them.	
Richmond Family Place Society	8660 Ash street	3800 SF	Lease	5 years, 3 years remaining	Renewable every 5 years. We have a history of secure renewable leases for 40 years.	We make it work but would like more office space for the increase number of staff.	300 SF	300 SF	Not if there is a cost involved to use additional space	The loss of this site would have a great impact on our organization, there would be a huge reduction in services and supports available to the community without it. Operations would be challenged as we have office as well as program space in this building. Program delivery is stretched at times and we need to limit the number of families accessing the site, however we are now considering the use of other spaces in the building and may reassess if we have sufficient staffing costs in place to support this. Program delivery would be impacted greatly with the loss of this space as approximately half of our clients in the past two years were accessing this site; it follows then that the number of clients accessing our services would decrease dramatically.	At our current site, we have outdoor spaces, this would be necessary at a new site in order to provide the resources for healthy programming. We also have offsite programs running at approximately 14 sites throughout the year through community partnerships of in-kind space in order to take the services and resources to clients less able to attend the main site. These sites are located within libraries, community centres, the food bank, neighbourhood learning centre and community parks, if any one of those sites were to be unavailable to us in the future, this would cause challenges to our ability to provide our services to the community as space is increasingly difficult to find (some challenges already exist where the space is unavailable during certain times of the day, times that families find easiest to attend may be unavailable to us at times).
Richmond Food Bank Society	100-5800 Cedarbridge Way, Richmond BC V6X 2A7	8848 sqft	Lease	5 years	No	Warehouse space is sufficient. Parking space is a an ongoing challenge especially on distribution days.			We have a small relocation fund but will have to fundraise if purchasing property in central Richmond	1,400 people are helped weekly with grocery assistance, 230 active volunteers engage in various food recovery and distribution tasks and activities, 19 different community agencies and programs supported with surplus food, recover over 899,897lbs annually. 70% of the total food recovered is perishable food which would have ended up in the landfills.	We would love to have garden plots where we can grow food and move towards creating a sustainable food system. 10 additional parking spots or make street parking free for food bank clients. RFB also distributes at three churches.
Richmond Food Security Society	7611 Ash Street	900	In-kind	4 years	Long term	Yes			Unsure	Affects programming, administration, and management of our society	Have shed space outside 10x12
Richmond Mental Health Consumer and Friends Society (RCFC)	210-7671 Alderbridge Way	510	In kind (VCH)	N/A	Yes	No	300-500	300-500	No	Loss of space would result in 10 to 15 of our monthly programs not being offered to our clients.	Our space is hard to access easily through transit. Most bus stops are at least 3 blocks away. This makes it hard for some clients to come to our programs

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							Now (e.g. in next 5 years)	Long term (e.g. in 10 – 15 years)			
Richmond Multicultural Community Services											
Site 1: Main Office	7000 Minoru Blvd	2500	Lease	2-year lease	yes	no	2500	5000	no	Workshops, computer lab for job search, childminding services, less staff working one on one	Programs offered at Caring Place have higher participation rates than those at this site due to proximity to services, schools, etc.
Site 2: Program Space	110-5751	1465	Lease	6 months	no	unsure	unsure	unsure	Unsure	Temporarily leasing space from	
Richmond Society for Community Living											
Site 1: Quantum Community Inclusion Program for adults with an intellectual disability	170-5726 Minoru Blvd.	3082 square feet	Lease	Month to month as owner does not want to renew the lease.	No. The owner has applied for a development application.	Yes			Yes	30 people with an intellectual disability that spend their day at the program will be displaced. Families will be without care for their son/daughter.	The space must be wheelchair accessible, with ground floor access and in-suite washrooms.
Site 2: New Community Inclusion program	TBD						2500 to 3000 square feet		Yes, as long as the lease rate is reasonable.	Youth graduating from high school that have an intelectual disability and require care during the day will not be able to access a program in Richmond. Families will not have care for their son/daughter.	The space must be wheelchair accessible, with ground floor access and insuite washrooms.
Richmond Women's Resource Centre	110-7000 Minoru Blvd.	709 sq feet	Lease	2-year lease	Yes	No	400 sq feet	800 sq feet	Unsure	It limits the provision of programs in terms of size, variety and frequency and it also reduces clients' accessibility to services.	
The Heart of Richmond AIDS Society	303-6411 Buswell Street	478 sq ft	Lease	2 yr	Yes	Yes			No	Limited no of members can attend workshops/programs	Fortunate to have South Arm Church provide accommodation for members dinners & use King George park for summmer bbqs
Touchstone Family Association (new location)	3031 Viking Way	12000	Lease	beginning Oct. 2019 for 10 years	Yes	Yes	0	0	Unsure	TFA is leaving the core due to a shortage of adequate space without demolition clauses that come with adequate parking	Some outdoor space would be a benefit for our young children and youth.
Turning Point Recovery Society (Homelessness Resource/Drop-in Centre)	8280 Gilbert Street	1500 sq. ft.	Lease	6 months increments	No	No	2500 - 3500 sq. ft	2500 - 3500 sq. ft	No	This is the only Drop-in Centre in Richmond for homeless and at-risk of homelessness indivduals. We provide critical linkages to health care and other social services from this location	Our lease is not secured at our current location. This would be a signficant loss to the community should we have no new space.