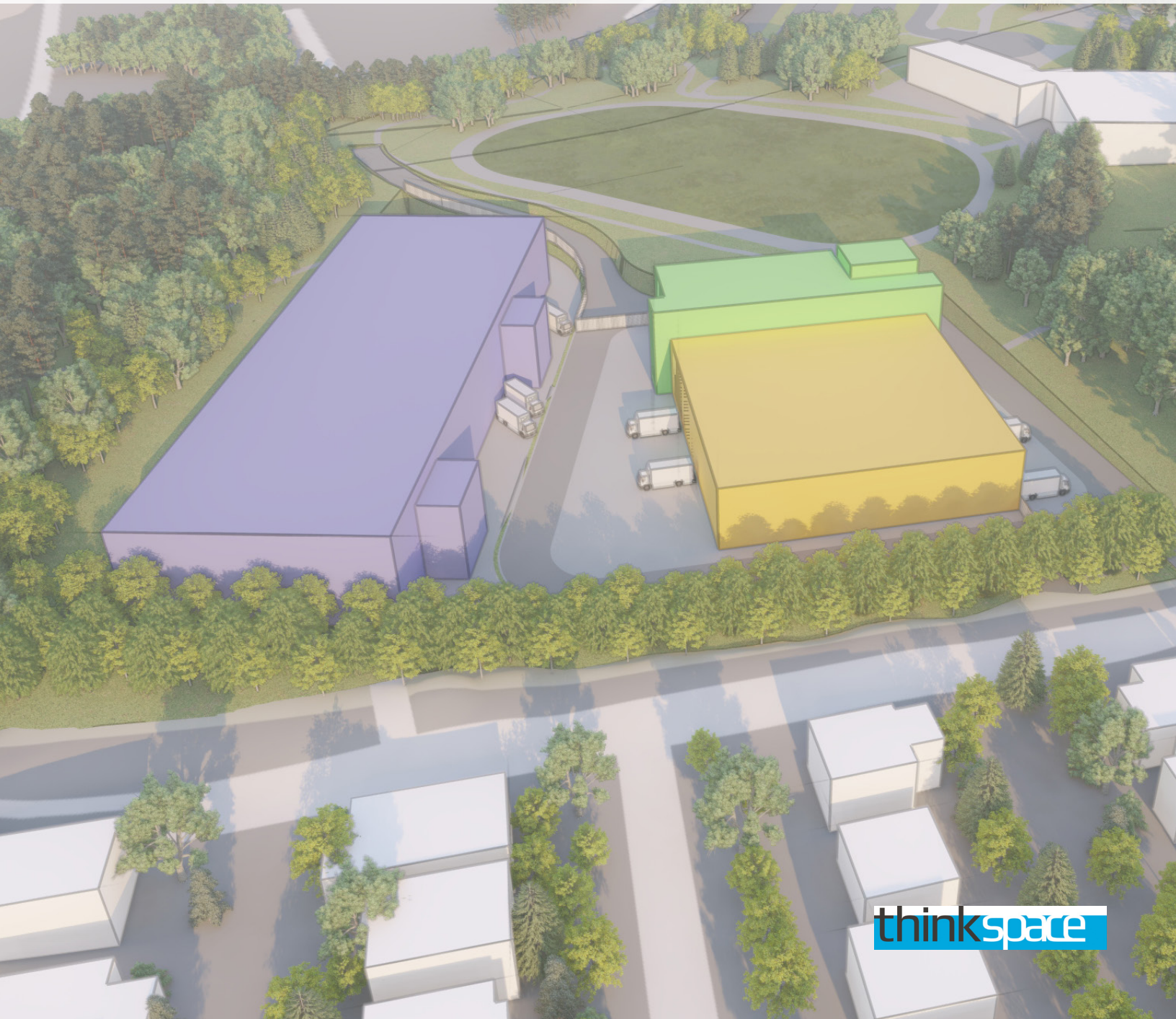




# Centre for Film and Digital Media Education Business Case Report





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# SECTION A AND B

## Executive Summary

In April 2021, the provincial government provided Camosun College with \$150,000 in funding to assist the College to explore educational opportunities for students in the BC film industry and the potential development of an on-campus film studio. The purpose of the funding is to enable the College to further develop the concept and business case for a Film Studio and Education Centre on the Interurban Campus.

A team of Industry consultants were retained to research and develop the production sector context for the business case and evaluate the project within the current business climate and context of BC's motion picture industry. Twenty-one interviews were conducted with stakeholders from across industry, including with representatives from studio facilities, educational institutions, production companies, labour organizations, specialized equipment suppliers and industry partner organizations. Anecdotal opinions were also collected from additional stakeholders and corresponding research and analysis across existing industry data sets was also carried out. The following paragraphs highlight the key findings from this research.

The global motion picture industry has seen dramatic growth in recent years, with technology driven market shifts, a fundamental reimagining of US-based studio interests, and an unprecedented surge in demand for creative content across distribution platforms. BC's motion picture industry has been one of the main beneficiaries of increased global investment, with production expenditures in BC exceeding \$3.6 billion during the fiscal year ending March 31, 2020.

Competitive advantages that contribute to BC's strong value production include:

- > Stable government incentive programs.
- > World leading post, visual effects, and animation capabilities.
- > Deep and experienced talent pool.
- > Extensive production infrastructure.
- > Favourable exchange rate with the United States.

These factors have all played an important role in building the province's reputation as one of the most competitive jurisdictions for film and television content production in North America and helped to attract major investment and global entertainment companies to the province.

New trends in industry market conditions, seen worldwide through the lens of a global creative economy on the rise, have presented mature production hubs like British Columbia with new and expanding opportunities to capitalize 'locally' on what is taking place globally.

Industry stakeholders' opinions collected in the course of this research strongly reinforce the need for workforce development and investment in infrastructure to support regional growth of BC's motion picture industry on Vancouver Island. Based on industry research and feedback from stakeholders, some of the key factors that support the business case for a Centre of Film and Digital Media Education at Camosun include:

- > Strong outlook for future growth of production activity in Greater Victoria.
- > Growing demand for skilled regional film crew.
- > Increased demand for film and creative technology training programs in BC.
- > Limited availability of studio infrastructure to meet increased demand.
- > Growth in the number of experienced film professionals who live and work in Greater Victoria.
- > Willingness of labour unions to increase access and availability of local hires.
- > Opportunities to partner with educational institutions and labour organizations to leverage and further develop existing film crew training programs.
- > Desire and commitment by employers and broader industry to build a more diverse workforce and work collaboratively as a sector to tackle shared labour challenges.

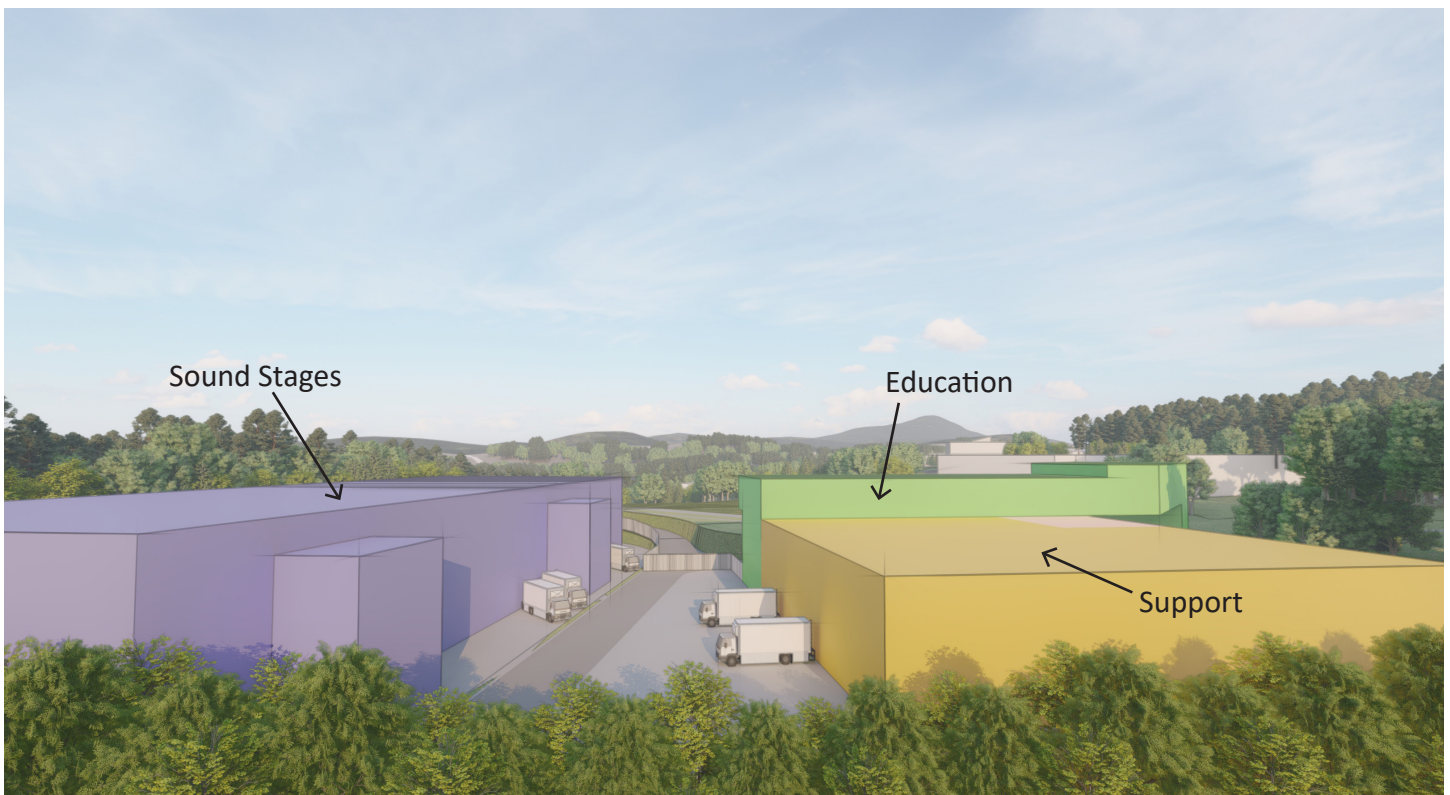
Taken together, these factors highlight the opportunity for Camosun College to work with industry and government partners to expand the training landscape for film crew occupations within the motion picture industry in BC. New models of learning and engagement are also needed to champion a more dynamic and inclusive workforce. Benefits of this new approach extend to students who could gain industry experience at a working production studio and employers and labour unions that could provide critical input into workforce priorities and access a growing regional film crew talent pool.

A Centre for Film and Digital Media Education at Camosun College has the potential to grow the quality and quantity of skilled industry labour and encourage BC's motion picture industry to expand beyond its hub in Greater Vancouver, creating new jobs and business opportunities that can drive economic activity in BC and throughout Vancouver Island. Now is an opportune time in the history of BC's production industry to invest in needed infrastructure and industry training in Greater Victoria to generate new jobs, investment, and business opportunities that a skilled and growing motion picture industry workforce in British Columbia can provide.

## **Concept Design**

Preliminary plans have been developed for the Centre for Film and Digital Media Education. When completed, the proposed Centre will include the following main elements:

- > State-of-the-art, purpose built sound stages.
- > Adequate support space for filming needs.
- > Production offices.
- > An educational building to house sound and digital editing, classrooms, and workshops.
- > Appropriate, functional, safe, accessible learning spaces to meet programming needs.
- > Strengthen the image of the College as a leading institution in the film industry.
- > Develop the south end of the Interurban campus, consistent with and supports the campus master plan.
- > Create a strong identity and sense of place for film industry training.



Proposed Concept

### ***Cost***

The projected budget prepared by Advicas Group Consultants, for the Centre for Film and Digital Media Education is based on current costs for this type of construction.

### ***Implementation***

Camosun College will complete an assessment for determining the optimum method for procurement.

Key criteria will be used:

- > The potential to “fast-track” the project for early accommodation of new film production training.
- > Competitive pricing and certainty of construction costs.
- > Ability to manage construction.
- > High level of design control to ensure the specific requirements of both the film production and education needs are met.

A preliminary schedule has been developed and identifies next steps for the project. These steps include further site review, engagement, AHJ and zoning, procurement, and building.

# SECTION C - PROGRAMMING

## Educational Programming

Camosun College has strong technology and trades programming, and with this, has the basis to develop specialized curriculum to train workers for the British Columbia film industry with special focus on behind the camera work that makes up the core of employment in film productions as well as the key digital post-production training. This new educational programming for film will allow Camosun to expand their vibrant learning and working environment to help address changes in the workplace, as Canada moves to a more digital economy.

The education programming will include post-trade extension and specialized courses in areas such as production assistant, electric, gaffing, set design and construction, camera and lighting, hair and makeup, and costume design. In addition, Camosun plans to offer a diploma in special effects/animation program.

## Indigenous Education

A strong emphasis for the development of education programming will be on ensuring access for indigenous learners. Work has already begun to communicate with local first nations and indigenous leaders on the development of the studio and their participation the clear benefits of the jobs and creative opportunities accruing from both the education programs to be offered by Camosun and that of the film studio itself. Camosun will ensure that whoever engages with us as an operational partner in the studio will engage proactively with local first nations.



## Anticipated Education FTEs

Behind the camera, trades related programming will be targeted at current working professionals with a base skill set in the specific area of their film production interest. Programming will be offered through Camosun's Professional Studies and Industry Training Department (PROsit) with the emphasis on short, stackable courses that will lead to industry and union recognized employable skills. Programming will be offered based on industry and learner demand and so FTEs will vary depending on the demand. On average, each sound stage will require approximately 300 workers per show so we can anticipate a continuous training need over many years given the increase in productions Vancouver Island is likely to experience in the next twenty years. Training facilities for these programs will be primarily located at existing trades facilities at Interurban Campus.

The special effects and animation programming will be part of Camosun's School of Trades and Technology offering. Given its highly specialized requirements Camosun is likely to partner with an education provider that currently offers a similar program in order to use already developed and tested curriculum. It is anticipated the program would start at approximately 50 FTE's and ramp up over time to include approximately 200 FTE's when fully operational. Facilities for this program will be purpose built on the studio site in order to accommodate the students and faculty in what will be a premium facility.

## Program Delivery and Tuition Revenue

Tuition for all programming will be assessed at market rates that will cover all College overheads and an approximate ten percent profit margin to the College. PROsit programming will vary in cost depending on the time, cost of instruction and required materials. Special effects and animation programming will be charged at market rates based on a review of public and private sector tuition fees for similar programs. Currently domestic students in British Columbia are being charged an average of \$30,000 to complete the Diploma while international student fees are approximately \$50,000. These tuition fees reflect the high cost of instruction provided by instructors with highly specialized skills.

# Section D - Project Context

The proposed project supports regional development in British Columbia's thriving motion picture production industry. The project is founded upon perceived demand from both industry and students that could, with strategic industry investment and development, lead to a substantially more integrated and robust production hub on Vancouver Island.

## Overview of the Motion Picture Industry in BC

The global motion picture industry has seen dramatic growth in recent years, with technology driven market shifts, a fundamental reimagining of US-based studio interests, and an unprecedented surge in demand for creative content across distribution platforms.

New trends in industry market conditions, seen worldwide through the lens of a global creative economy on the rise, have presented mature production hubs like British Columbia with new and expanding opportunities to capitalize 'locally' on what is taking place globally.

BC's production sector is well-positioned to continue its evolution as a key player in the ambitious business of 21st century motion picture production. From a steep growth trajectory over the past three decades, BC's motion picture industry has emerged as a mature business cluster made up of live-action, animation, visual effects and post-production business interests. The industry comprises an array of key competitive advantages within an industry ecosystem that has become a significant driver of BC's broader, knowledge-driven creative economy.

### ***BC Production Industry Value Proposition***

**A Key Production Market in North America:** BC meets the highest standards in production infrastructure and expertise across physical production, post, visual effects and animation. Primarily known as a jurisdiction that produces medium-to-high budget episodic television and made-for-TV movies, a large number of big budget feature films, award winning documentaries, and high-end television commercials are also produced in BC. Competitive advantages that contribute to BC's strong value proposition include:

- > Expansive studio infrastructure matched by sophisticated supply chain.
- > Deep talent/crew-based fluctuating workforce of 60,000-70,000 with capacity to simultaneously serve 50+ productions.
- > Globally connected independent producers/production companies.
- > Dependable and collaborative labour force.
- > World leading post, visual effects & animation capabilities.
- > Diligent and evolving industry sustainability strategies.
- > Reliable tax incentives.
- > Diverse and spectacular locations.
- > Robust Provincial/Regional/Municipal film commission network.
- > Strong public-private stakeholder relationships & collaboration.

**Industry Partners:** The BC production industry captures (but is not limited to) a diverse complement of industry stakeholders who together form the backbone of the province's uniquely collaborative ecosystem. Key industry stakeholders include:

- > Actsafe Safety Association.
- > Association of Canadian Film Craftspeople (ACFC) West Local 2020.
- > Animation & Visual Effects (AVFX) Alliance.
- > BC Council of Film Unions (BCCFU).
- > Canadian Media Producers Association-BC (CMPA BC) Canadian Producers.
- > Directors Guild of Canada BC (DGC BC).
- > Interactive & Digital Media Industry Association (DigiBC).
- > International Alliance of Theatrical Stage Employees (IATSE) Local 891.
- > International Cinematographers Guild (ICG) Local 669.
- > Motion Picture Alliance Canada (MPA Canada) US Studios/Producers.
- > Motion Picture Production Industry Association of BC (MPPIA).
- > Provincial Film Commission at Creative BC.
- > Regional Film Commissions (8 across the province).
- > Teamsters Local Union 155.
- > Union of BC Performers (UBCP/ACTRA).
- > Vancouver Film Commission/Vancouver Economic Commission & Municipal Film Offices across Metro Vancouver.

**Technology Cluster:** In addition to robust physical production activity, BC is home to an award-winning visual effects (VFX), animation and post-production sector, both across the Lower Mainland and ingrowing regional hubs, particularly in the Okanagan and on Vancouver Island. Competition for skilled talent in this space is strong and training, recruitment and retention are key priorities in this dynamic sub-sector. BC's strengths in this sub-sector include:

- > Deep technology & talent pool that supports over 60 companies within the VFX & animation cluster in BC.
- > Extensive digital picture and sound post-production, VFX and motion capture facilities.
- > Near-set and facility dailies lab services.
- > Editorial services and support.
- > 4K/HDR finishing and DI Theatres.
- > Maximized connectivity to all corners of the world.
- > Atmos Sound Stages.
- > VR/AR/MR capabilities.

**Infrastructure Landscape:** To date, BC has developed a robust and growing studio and supply infrastructure. A broad range of purpose-built studios that include some of North America's largest, are complemented by strategically located converted warehouse facilities that together comprise a broad network of studio facilities that operate in high demand year-round. BC's infrastructure strengths include:

- > 2.5+ million sq. ft. of stage and support space.
- > 42 new stages reported to be in varying stages of development.
- > Traditional, VFX and boutique sound stages with end-to-end capacities and turnkey production office space.
- > Driven by leading technologies and progressive industry practices.
- > Extensive matching inventory of the latest in camera and production supply.
- > Outfitted to minimize the industry's environmental footprint.

**BC Gateways:** The Provincial Film Commission at Creative BC is the province’s primary industry gateway working in partnership with regional, municipal, national and international networks, as well as industry stakeholder associations, to ensure smooth domestic and international production activity in BC. Creative BC’s competitive strengths include:

- > Connection to 8 regional film commissions.
- > Collaboration with 22 municipal film offices.
- > Location services World of Looks™.
- > Familiarization tours and Digital library.
- > Community Industry Relations leadership.
- > Key collaborator with MPPIA, MPA Canada/US studios, CMPA BC/BC. Producers and labour organizations.
- > ReelGreen.ca oversight.
- > Creative Pathways oversight.

**Provincial Tax Incentive Programs:** Tax incentive programs have developed worldwide to become a competitive necessity in nearly every production jurisdiction. Administered under the umbrella of Creative BC, the provincial tax credit programs – Film Incentive BC (FIBC) and the Production Services Tax Credit (PSTC), were first introduced by the BC government in 1988. FIBC applies to BC-based and Canadian controlled production companies, while the PSTC applies to Canadian or international film and TV production companies with a permanent establishment in BC.

Both tax credit programs target qualified labour costs, based on amounts that are paid by eligible production companies to BC residents to work on eligible projects. BC’s tax incentive programs – while not the ‘all-spend’ type common in other provinces and countries – are considered reliable and competitive, as well as transparent and logical due to their direct ties to BC job creation.

**Federal Tax Incentive Programs:** The Government of Canada also offers two federal tax credits for film and video production that provide an additional tax credit on Canadian labour costs of 16% for international production and 25% for domestic production. These programs are co-administered by the Canadian Audio-Visual Certification Office (CAVCO) and the Canada Revenue Agency (CRA).

### Production Services Tax Credit (PSTC)

TAX CREDIT	VALUE
Basic PSTC	28%
Regional PSTC	6%
Distant Location Tax Credit	6%
Digital Animation, Visual Effects + Post-Production (DAVE)	16%

Source: Creative BC

### Film Incentive BC (FIBC)

TAX CREDIT	VALUE
Basic FIBC	35%
Regional Tax Credit	12.5%
Distant Location Regional Tax Credit	6%
Digital Animation, Visual Effects + Post-Production (DAVE)	16%
Training Tax Credit	30%
Scriptwriting	35%

Source: Creative BC

**Economic Impact:** When a film or television series shoots on location, it brings with it jobs, revenue, and related infrastructure development. Physical productions provide a significant and immediate boost to the local economy, creating a ripple effect on job creation and innovation in other industries. It is worth noting that film and television productions can also generate additional economic, community and social benefits. These may include the creation of opportunities for trainees or interns, the development of business partnerships, the creation of spin-off companies and contributions to the local community and culture. In some cases, popular productions can also boost tourism. Film induced tourism (FIT) is the phenomenon of films and television programs encouraging viewers to visit the country or region where filming occurred. FIT and its related tourism impacts have increasingly been viewed as an important component of tourism marketing.

According to the Vancouver Economic Commission, spending on film, TV, post-production and animation in BC equaled \$3.4 billion in 2020, despite COVID 19 production pauses. This represents a modest decline compared to the previous record topping \$4 billion in 2019, and easily accounted for when considering the public health crisis and prolonged industry pause last year.

The Motion Picture Association (MPA) Canada publishes production case studies that highlight the economic impact of a single film or television project on a local economy. A recent case study on the feature film, *Sonic the Hedgehog*, which was shot partially on Vancouver Island, reported that the project spent over \$37 million in BC, including \$22 million on local labour (creating 1,450 jobs for BC cast and crew) and \$15.5 million on local goods and services (i.e. \$490,000 on catering and food items, \$350,000 on hardware and lumber supplies and \$1.6 million on hotels and accommodation). Some of the film locations included Shelter Point Distillery in Campbell River, the Diplomat Motel in Nanaimo, Stawamus Chief Park in Squamish and the Cook Creek highway interchange on Vancouver Island.

As evidenced by the data above, the economic impacts resulting from the production of a long-running television series, major feature film, or digital animation project can be substantial. These benefits can include increased economic activity and investment, local employment opportunities, trade for local businesses, contributions to tourism, and synergies with other industry sectors that contribute to the advancement of a diversified economy.

### ***Production Demand – Global***

Rapid growth in BC’s motion picture industry has been driven by global expansion in entertainment content production. New delivery platforms, new markets and worldwide growth in mobile technologies and devices have fueled this demand. From scripted TV series to feature films, animated programs to factual documentaries, entertainment content demand has been driven by competition for new audiences. Streaming providers including Netflix, Amazon Prime, Apple and Hulu and the major US production studios are increasing investment in entertainment content and production.

According to a recent Kemps Film TV Video article, global film and TV production spending rose by 16 percent to \$220 billion in 2020, despite the COVID pandemic which halted production for several months of the year. During the pandemic, audience demand, production spending, and TV budgets reached all-time highs.

Research from Purely Streamonomics reported that Walt Disney Company was the largest spender on content in 2020, estimated at \$28.6 billion, with Warner Media spending \$20.8 billion, followed by Netflix with \$15.1 billion. Amazon came in fourth at \$11.8 billion. Over the next few years, audience demand for streaming services is expected to see continued growth, fueling the demand for new content with streamers anticipated to spend over \$250 billion in 2021.

### ***Production Activity - BC***

BC’s film and television industry is a major economic contributor to a strong knowledge-based economy in the province and a major source of private sector employment. According to Creative BC tax credit data, BC is one of the most competitive motion picture production jurisdictions in North America, behind only California and New York in terms of its volume of production expenditures. During the fiscal year ending March 31, 2020, the motion picture industry in BC spent an estimated \$3.6 billion on over 400 film and television projects.

**Creative BC Provincial Tax Credit Data by Fiscal Year ending March 31, 2020**

<b>Fiscal Year</b>	<b>2020</b>	<b>2019</b>	<b>2018</b>	<b>2017</b>	<b>2016</b>	<b>2015</b>	<b>2014</b>	<b>2013</b>	<b>2012</b>	<b>2011</b>
<b>Expenditures (\$ millions)</b>	\$3,601	\$3,207	\$3,443	\$2,624	\$1,922	\$2,023	\$1,448	\$1,476	\$1,336	\$1,663

Source: Creative BC



Live action projects represented the largest share of production expenditures, followed by digital animation and visual effects (VFX) projects. In terms of production formats, TV series represented the largest number of productions (111 projects) followed by feature films (73 projects) and TV movies (68 projects). Creative BC estimates that \$3.6 billion in production expenditures in fiscal year 2019/20 resulted in labour expenditures of \$2.1 billion, demonstrating the strong job creation that results from production activity in the province.

### ***Production Activity - Vancouver Island***

Although the province has seen major growth in the film and television industry, production activity has mostly been concentrated in the Lower Mainland. According to Creative BC’s 2019 Labour Market report however, there is a growing trend for productions to move and establish themselves in locations outside the Lower Mainland/Southwest economic region, not solely for creative reasons but also for affordability. Over the last several years, higher volumes of production activity in Greater Vancouver has driven more domestic and some foreign productions to locate in other regions of BC, with Vancouver Island emerging as a secondary hub.

According to Vancouver Island South Film and Media Commission, Greater Victoria had a record year for production in 2020, even with an extended industry shutdown due to COVID 19. Greater Victoria hosted 38 productions in 2020 with an estimated \$55 million in direct spending, more than doubling the previous year’s total.

### **Production Activity in Greater Victoria**

**Jan 1 to December 31, 2020**

<b>Project Type</b>	<b>Number of Projects</b>	<b>Shoot Days</b>
TV Movie	7	82
TV Series	11	305
Commercial	5	11
Music Video	8	11
Other	7	162
<b>Total</b>	<b>38</b>	<b>571</b>

*Source: Vancouver Island South Film and Media Commission*

Maid, a 10-episode Netflix series from the producers of Shameless and Promising Young Women, is about a single mother who struggles to survive through poverty and homelessness. Recently shot entirely in Greater Victoria, the series is estimated to have spent \$10 million, making it the biggest TV production ever to shoot in the region. Production began in September 2020 and the series wrapped shooting in April 2021, creating jobs for over 200 crew and benefiting hundreds of local businesses, from hotels and restaurants, to BC Ferries.

According to stakeholders interviewed, there has been a major growth in both interest and landed production in Victoria in the last 5 years. The region hosts a consistent number of Hallmark TV movies with budgets between \$3 and \$4 million. These projects provide steady employment for a small but growing local crew base, typically employing about 200 locals for about 6 weeks, with 3 weeks of shooting. According to one local producer, salaries for the mostly non-union crew who work on these projects can range from \$80,000 to \$150,000 a year, with crew usually finishing one project and starting on the next. It is important to note that productions of this size and scale would typically not use a purpose-built studio because of the cost and dependence/preference for on-location shooting.

Higher budget productions are also attracted to Victoria but tend to be less frequent. These projects generally shoot for short periods and bring the majority of crew from the Lower Mainland. Up until recently, larger budget productions have been reluctant to locate an entire project outside of Metro Vancouver, due to the challenges associated with relocating cast and crew and the extra costs associated with transportation and logistics. With the recent success of the series Maid, more attention and interest from producers to locate production in Victoria is anticipated. Creative BC's October 2021 production list currently includes 3 productions (Reginald the Vampire – Season 1, Ballistic – Season 1 and Phantom Pups – Season 1) with production offices located in Victoria.

Other parts of Vancouver Island have also experienced increased production activity in the last 3 years. Island North Film Commission reported that 31 projects filmed in the region in 2018, with the feature film, Sonic the Hedgehog, spending a reported \$11 million in the region. The Apple TV+ original series See starring Jason Momoa also filmed for over a year and a half in the region. Shooting began in October 2018 with the series filming in Campbell River's decommissioned pulp and paper mill and Strathcona Park. Large sets were built at both locations. Production activity on Vancouver Island has been also supported with the opening of Vancouver Island Film Studios in Parksville in October 2017. The facility offers six stages ranging in size from 5400 to 8400 sq. ft. and has been used for the filming of the Hallmark series Chesapeake Shores. Infilm also was instrumental in developing a regional film crew pilot training program in partnership with industry and North Island College in 2018 to increase local labour to service the growth in production activity.

## Labour Supply in BC

Entertainment content production is a highly collaborative process that depends on input and cooperation from hundreds of creative artists and skilled technicians. One of BC's greatest strength in attracting production is its human capital – very few regions in the world have the volume and depth of skilled labour that can attract investment and major companies like Disney, Warner Bros, Netflix, Apple and Sony. Creative BC's labour market study released in December 2019, estimated that the BC based motion picture industry workforce, including film, TV, animation, VFX and post-production, included over 70,000 people in 2017, with an estimated payroll of \$2.1 billion.

According to the report, two thirds of the 70,000 people who work in the motion picture industry in BC are made up of “below-the-line workers”. These are the film technicians, craftspeople, artists, managers and designers whose occupations form a very diverse workforce. From construction coordinators to animal trainers, production managers to visual effects supervisors, the industry creates diverse and well-paying jobs that span trades, business, art and technology occupations.

Most production workers are freelancers, and are represented by one of several local labour unions that are responsible for negotiating labour contracts with employers and providing benefits and training to members. Given the industry's strong employment growth, it has attracted young workers as well as experienced workers from other industries with transferable skill sets.

The digital production sector, which includes animation and visual effects work, has also been expanding rapidly in BC. Demand and competition for experienced talent has been steadily increasing year-over-year across all creative and technical occupations. Unlike the live-action sector, workers in digital production are non-union and tend to move regularly between projects and employers. With the volume of work in the visual effects and animation sector globally and ongoing labour shortages in BC and across Canada, visual effects and animation companies have had to depend on international recruitment to fill the talent gap.

The B.C. Labour Market Outlook 2018 projects the Motion Picture and Sound Recording industry to be one of the province's fastest growing industries, with employment growth estimated at 3.3 percent from 2018 to 2023, compared to 1.1 percent average annual rate for BC overall employment growth. The industry is expected to have about 16,500 job openings between 2018 and 2028, including 6,130 new jobs created to meet replacement demand and 10,396 new jobs created to meet expansion demand.

Assuming steady growth in global content production, Creative BC's labour market report identified the need for BC's motion picture industry to develop and grow its workforce to maintain its competitive advantage among other production jurisdictions. According to the report, recruitment will be imperative to meet workforce growth. The report also estimates that over the next 10 years, the motion picture industry below-the-line workforce will need to increase by 5% to 10% each year, representing both replacement and expansion demand. Workforce development strategies were recommended to meet this demand as well as to increase the skills base of the industry's existing workforce.

### ***Labour Supply in Greater Victoria***

One of the perceived obstacles to film industry growth in Greater Victoria has been the depth and availability of experienced local crew. Because regional film work can be sporadic, skilled crew that do live in the regions will often travel to the Lower Mainland where work opportunities are more abundant, resulting in crew labour shortages in the region. Insufficient supply of local crew in turn increases production costs as the production must pay for accommodation and per diem for non-resident cast and crew, as well as transportation costs, which may more than offset incentives received under the distant regional tax incentive.

Given that availability and access to skilled crew is an important factor in determining where production companies decide to locate production, industry stakeholders were asked to comment on the current capacity and perceived shortages within Greater Victoria's motion picture workforce. Stakeholder comments and feedback are summarized in the following paragraphs.

It was noted by interviewees that there is a respectable cross section of resident production crew on Vancouver Island, but during busy periods labour supply may not be aligned with labour demand. The result is persistent pressures in some departments to find experienced workers. Vancouver Island South Film and Media Commission estimates that Greater Victoria currently has a crew capacity to support 3 projects at a time depending on the scale and size of production. The Commission's local crew database has over 800 experienced film workers who are registered to work in Greater Victoria as local hires.

Positions that would typically be hired locally include production and location assistants, security, drivers, lighting, grip, paint, catering, craft service, greens, hair and make-up, set decoration, and background extras. Entry-level crew (as opposed to skilled trade/professions) still comprises the largest portion of local crew hires on higher budget productions.

Higher budget productions generally bring in heads of departments, but will draw from locals who are living in the area with transferable skills or who are semi-retired. One interviewee commented that occupations that are more trades focused, (i.e. electricians, grips, security, hair and make-up) can be picked up and integrated more easily as local hires.

Interviewees also were asked to comment on perceived labour shortages. Departments and specific occupations that were identified as difficult to hire locally included cinematographers, camera operators, focus pullers, rigging grips, production coordinators, production managers and experienced costume and hair and make-up professionals. Other occupations with perceived labour shortages include directors, (1st AD, 2nd AD) production accountants, and production designers. One interviewee commented that there is currently little demand for carpenters in Greater Victoria because very few sets are being built with the high percentage of location shooting. With the opening of a film studio however, trained carpenters for set builds will be needed.

Despite some labour shortages, there is a strong priority for productions to crew locally because of the significant cost savings for producers. One producer reported being able to hire nearly all crew positions locally, except for dolly grip, camera and hair and make-up. It was also noted that there can sometimes be a disconnect with respect to hiring local crew. Vancouver-based production managers are often reluctant to hire locally, given their preference to bring their own crew from Vancouver, especially for larger budget projects.

To help support regional production, IATSE 891 recently surveyed its membership to create an accurate list of members that have residences or local ties to communities outside the Lower Mainland and would be willing to work as “local-hires”. As part of the Master Agreement with producers, IATSE is obligated to provide a list of local hires when a production films in a distant location. According to IATSE 891 data, more than 2,500 members either reside or are willing to work as a local hire on Vancouver Island.

While it was noted that these members are often employed full-time in Metro Vancouver, with growing production activity on the Island, many members with connections to Greater Victoria may consider moving back to the region, given its relative affordability and high quality of life. Local film workers could also be tapped to help develop and deliver industry-led training programs and create networking opportunities to help build the region’s crew capacity.

## Infrastructure Supply in BC

Over the last 5 years, there has been major expansion in film and television production infrastructure in BC. Studio owners and operators have invested in new construction and facility improvements in both Metro Vancouver and other regions of the province. Private sector infrastructure investments have significantly increased the industry's production and employment capacity.

In 2021 Creative BC mapped over 2.5 million square feet of stage space with a network of stages ranging from 2,000 sq. feet at their smallest to more than 120,000 sq. feet at the top end of the scale. From purpose built sound stages to industrial warehouses converted for production use, BC now offers over 120 sound stages, more than 130 animation, VFX and post-production companies, as well as an estimated 160+ expert industry supply companies.

Physical production facility expansion has occurred across Metro Vancouver, most notably in the municipalities of Burnaby, Vancouver, Surrey, Langley and Richmond, as well as other regions of the province, including the Okanagan and Vancouver Island.

There are a total of five purpose-built studio facilities in BC, with three located in Burnaby, one in North Vancouver and one in Vancouver. As of August 2021, these purpose-built facilities provided a total of 47 stages and close to 725,000 square feet of stage space. In addition, Martini Film Studios is currently developing a new studio facility in Langley that will feature 600,000 square feet of purpose built sound stages, offices and production support buildings. This new studio development is expected to raise Greater Vancouver's film capacity by as much as 15 percent. According to several interviewees, even with growing infrastructure, facilities in Metro Vancouver report very low vacancy rates.

Digital animation and visual effects studios have also expanded their investment in infrastructure as the volume of visual effects and animation work has grown in BC. Most animation and visual effects facilities are located in Vancouver, or the Greater Vancouver area, although regional hubs are developing in the Okanagan and Vancouver Island. With remote work practices brought on by COVID, more visual effects and animation companies may choose to locate facilities outside Greater Vancouver. This could in turn bring new skilled talent to the regions and expand the need for experienced local talent that can support company development and project needs.

### ***Infrastructure Supply in Greater Victoria/Vancouver Island***

One of the strategies identified by the South Island Film and Media Commission to increase film and television production in the region is the development of a purpose-built studio. The current state of the production ecosystem/supply chain on Vancouver Island means that stage-based production is not yet a key driver of increasing production activity. According to the Film Commissioner, during the last few years it has been increasingly difficult to find suitable facilities to accommodate productions in Greater Victoria. The result has been that several projects interested in locating in the region have been turned away because of lack of infrastructure.

Industry stakeholders were asked to comment on the viability of a purpose-built film studio in the region. Stakeholder comments and feedback are summarized in the following section.

The Film Commission and broader industry stakeholders agree that a production studio is needed in Greater Victoria. A studio facility would enable the region to attract a wider range of productions, including TV series and bigger budget features and strengthen the region's desirability as a production destination. It was also suggested that studio development would help anchor the industry and encourage the development of a cluster, further benefiting the region's production capacity and economic and job creation potential.

Interviewees commonly mentioned Victoria's location assets, including its diverse neighborhoods and architectural styles, urban and natural settings and desirable city infrastructure in terms of its accommodation and restaurants. The region also has an international airport. While there was broad agreement that studio infrastructure would help drive production, it was not seen as the only critical factor. One interviewee felt that even with a studio, it would still be hard to get productions to leave the Lower Mainland because of the advantages that Vancouver offers as a full service production centre. Transportation to Vancouver Island is logistically challenging and travel time is an issue.

One interviewee commented that attracting a TV series, with a \$3 to \$4 million budget per episode that would set up their entire production in Victoria would be ideal for the region. A relationship drama, with a rural, nature focused setting like the TV series *Virgin River* or *Gracepoint* would offer stable employment and greater certainty of work for local crew. It was also suggested that with the recent success of Netflix's series *Maid*, the region's desirability and value proposition as a film destination could increase.

Other regions of Vancouver Island have invested in studio infrastructure. Vancouver Island Film Studios, located in Parksville, is a 49,000 square foot converted facility, with 6 small stages, ranging in size from 6,250 to 8,750 square feet, in addition to office space, construction and paint shop. According to the website, the facility is fully booked until January 2022. MBS opened Wellington Film Studios in Nanaimo in July 2020. The facility offers 43,000 square feet of space that can be divided as needed and includes AC, heat and 130 parking spaces. It is anticipated that growth in industry infrastructure in the region will encourage more productions to locate on Vancouver Island, further expanding the demand for locally available crew.

### ***Studio Development Criteria/Considerations***

Interviewees were asked to provide feedback on the key factors that could impact the development and operation of a film studio at Camosun. Stakeholder comments and feedback are summarized in the following section.

For studio infrastructure, purpose-built space is preferred by most productions due to the unique considerations of motion picture production. However, interviewees also commented on the high cost to develop purpose-built stages. It was equally noted that flexibility in the use of space, or hybrid models are seen as being advantageous – to adapt to changing needs of productions and/or for mixed use to mitigate the ebb and flow of production demand.

In addition to stages, it was recommended that a facility include construction workshops, wardrobe and set decoration storage, production offices and other support services. Sound proofing, 24-hour security, clear span ceilings, accessible parking, adequate power, high-speed data transfer, and proximity to popular filming locations and accommodations were also thought to be key considerations in terms of a facility's perceived desirability. In order to attract production activity, it was recommended that rental rates be lower than those offered in the Lower Mainland. It was also recommended that studio facility operators be experienced industry professionals with established relationships with domestic and foreign production studios.



## Motion Picture Education and Training in BC

BC's education and training programs have played an important role in developing the talent needed to grow the motion picture industry in the province. BC is home to at least 50 film and television programs and courses, collectively offered by more than 20 public and private post-secondary institutions. In addition, BC production companies, studios, labour organizations and trade associations have also invested in training and professional development and play an important role in expanding the depth and quality of BC's education infrastructure and local talent base.

Public educational institutions that offer motion picture-related degree and diploma programs include:

- > British Columbia Institute of Technology
- > Capilano University (Nat and Flora Bosa Centre for Film and Animation),
- > Centre for Digital Media (Masters of Digital Media) partnership between SFU, Emily Carr and UBC
- > Emily Carr University of Art and Design
- > Langara Community College
- > Simon Fraser University (the Centre for Contemporary Arts)
- > University of British Columbia (Film and Theatre Department and Computer Science Department)

Private industry education institutions/programs offering live-action and digital production training include:

- > Art Institute of Vancouver
- > Blanche Macdonald Centre
- > Centre for Arts and Technology
- > CG Masters School of 3D Animation and VFX
- > InFocus Film School
- > Lost Boys Studios
- > Nimbus School of Recording and Media
- > Think Tank Training Centre
- > Vancouver Acting School
- > Vancouver Film School
- > Visual College of Art and Design

### ***In Focus: Capilano University School of Motion Picture Arts***

The \$40 million Nat and Flora Bosa Centre for Film and Animation opened its doors in 2012. Home to the School of Motion Picture Arts (MOPA), the school includes programs in animation, visual effects, motion picture art, documentary and indigenous film making, along with film crafts that include costuming, grip and lighting.

MOPA's Film and Digital Training Programs include:

- > 2D Animation and Visual Development Diploma
- > 3D Animation for Film and Games Diploma
- > Animation Fundamentals
- > Bachelor of Motion Picture Arts Degree
- > Motion Picture Arts Certificate
- > Motion Picture Arts Diploma
- > Costuming for Stage and Screen Diploma
- > Documentary Certificate
- > Indigenous Digital Film making Certificate
- > Indigenous Digital Film making Diploma
- > Visual Effects for Film, Streaming and Immersive Media Diploma
- > Lighting for Digital Imaging and Film (4 week intensive)
- > Grip Work for Digital Imaging and Film (4 week intensive)

MOPA was established with input from industry veterans to help ensure that graduates are equipped with in-demand skills that enable them to be job-ready. The award-winning 70,000 square foot facility provides everything necessary to create live-action, animated or 3-D production. Facilities include virtual reality and motion-capture equipped studios, high speed rendering, professional film making equipment and 3D printers. Equipment includes two stereoscopic 3-D camera rigs, a 200-seat 3-D theatre, HD cameras including Panasonic HPX 300, Sony F3, Arri, Alexa and Red, sound mixing and recording studios, costuming studios, and visual effects labs.

### ***Film Training Demand in BC***

Interviewees report that demand for film-related training has increased over the last 5 years with student demand expected to continue in pace with increased employment opportunities in the industry. Capilano University reported they have hundreds of applications for their film and digital training programs that they are unable to accommodate from both BC and international students. A recent Digi BC report on BC's Creative Technology Ecosystem found that student interest for training in this sector exceeds available seats. According to the report, over the past three years, student applications to creative technology programs were two to 10 times higher than admissions.

### ***Industry Sponsored Training Initiatives***

BC labour organizations and employers also require tailored educational programming to better respond to industry workforce needs, including customized equity and diversity programs, ongoing safety requirements, COVID work practices and skills training in new and emerging technologies.

IATSE 891 for example, has developed a training guide for its members that provides training information on Actsafe and BC Fed Safety Training programs as well as approved training for each of its 19 departments (which represent a particular entertainment industry trade or craft). Departmental training includes skills-based custom designed courses, hands-on workshops and master classes provided by industry members, as well as training provided by approved educational institutions. Training for members is either free or partly subsidized by the union and each department reviews available training programs annually. Actsafe is a not-for-profit health and safety association supporting British Columbia's arts and entertainment industries. Actsafe provides resources and training to employers, workers, and supervisors to achieve a healthy and safe workplace. The association offers virtual, in-class, and practical classes for those who are either presently working or seeking work in the motion picture, television, live event, or performing arts industries. Some of Actsafe's course offerings include:

- > COVID 19 Safety Procedures Course
- > Aerial and Scissor Lift Training
- > Firearm Safety Level One
- > Fall Protection Training
- > Motion Picture Safety 101
- > Motion Picture Safety for Supervisors
- > Motion Picture Industry Orientation
- > Occupational First Aid – Level One
- > Reel Green Climate and Sustainable Production Course
- > Workplace Hazardous Materials Information Systems (WHMIS)

According to Actsafe’s training dashboard, the association has provided 15,971 Motion Picture Safety Awareness Workshops and Online Training Completions to date, demonstrating strong demand for its course offerings.

To meet growing demand for trained crew in the camera department, the International Cinematographers Guild Local 669 offers a camera trainee program that is designed to provide skills and on-set experience to train participants to become 2nd Assistants. The training program teaches students foundational knowledge, skills, and abilities that are required to work on set in the camera department and in a union environment. The program provides indispensable work techniques and habits, familiarity and experience with camera systems, and ensures trainees can make valuable contacts within the industry. On average, most of the Camera Trainees graduate from the program after one to two years, depending the volume of activity in the industry. Once a trainee has completed the required training, they become formal Camera Trainees eligible for dispatch on union shows.

### ***Reported Gaps in Film Training***

Although there is a wide variety of motion picture industry education and training programs in BC, interviewees noted that there are very few programs or courses that offer introductory training or skills development for the broad range of occupations in the motion picture industry. Gaps in training identified by interviewees included short-term courses that could increase awareness of how to work effectively and safely on a film set, as well as entry level and advanced skills training for specific occupations and departments. Interviewees were asked to comment on motion picture industry film crew training in BC, identify any perceived gaps and provide insight regarding best practices in current training programs. Feedback is summarized in the following paragraphs.

In terms of industry training, interviewees from educational institutions and industry strongly supported the need for more below-the-line film crew training to grow the current and future labour needs of the industry. Most film training programs in BC are not targeted to film crew occupations, and tend to be more focused on talent development for occupations considered to be “above the line” positions in writing, directing, acting and producing.

One interviewee commented that because of the unique labour dynamics, which include the project-based nature of work and predominance of contract workers rather than long term employees, there is very little formal training available for film crew occupations. Another challenge identified is that there is little incentive for individual film and television production companies to provide training for freelance workers. Interviewees commented that for most crew positions, training has been gained informally through on-the-job work experience. However, with the rapid pace of most productions, there is very little time for knowledge and skill transfer, which could erode minimum skill competencies over the long-term.

Key gaps in training that were identified included a foundational skills program for new industry entrants that builds on existing industry orientation courses and provides more in-depth exposure to the on-set work environment, expectations, communication protocols and safety requirements. Other occupations or departments that were identified as needing more formal training programs included production design, set decoration, production accounting, production coordination, greens, and special effects.

One opportunity that was identified to support workforce development included increasing awareness of film-related occupations among local trade workers and current trade students who may have transferable skills to the film industry. Given Camosun College's strong focus on apprenticeship training for trades, interviewees commented that there could be an opportunity to incorporate a focused film industry component to existing trades training programs.

### ***In Focus: North Island College Film Crew Training***

Building a skilled and qualified local crew base has been a priority for the Vancouver Island region for several years. Infilm, the film commission in Campbell River has been working with North Island College (NIC) and industry on a series of film trades training programs first piloted in the region in 2017 to address the need for film crew workers. The Ministry of Advanced Education provided NIC with funding to develop and deliver short-term film crew training to Vancouver Island residents, including tradespeople and First Nation community members. The film crew training programs were delivered by experienced film industry professionals at NIC College Campbell River and Port Alberni campuses between October 2017 and February 2018.

A total of 132 students graduated from four program streams that targeted training specific to entry-level positions in production (PA), set construction, grip and lighting. The pilot program engaged a broad range of community and industry stakeholders to ensure training aligned with labour force needs and was recognized by film industry unions and employers. It was also envisioned that the program would establish a model for future film crew training that could be expanded to other areas of the province to help grow film production opportunities in areas outside of the Lower Mainland.

NIC's film training programs have recently expanded to include customized training for occupations in the craft service and production accounting departments. In response to COVID 19, four micro credential film skills training programs were developed and delivered online to 116 participants throughout BC. Students graduate from these programs with their motion picture orientation tickets and other certifications that are required by industry unions to work as entry-level crew.

According to InFilm, regionally available film crew training has increased the availability and quality of local crew and strengthened the region's growth and reputation as a regional filming centre. Graduates of the program have reportedly gone on to find steady work in the industry both on Vancouver Island and throughout BC.

### ***Best Practices in Film Training***

Interviewees were asked to provide feedback on best practices and delivery options that they felt are critical to the development and success of film crew training programs. Stakeholder comments and feedback are summarized in the following section. According to interviewees, key success factors include (but are not limited to) the following:

- > Experienced instructors with direct, hands-on 'real world' knowledge who ideally live and work in the region.
- > Experiential learning opportunities that include 'real world' exposure and practical skills development.
- > Applied curriculum and instruction that demystifies industry jargon, practices and culture.
- > State-of-the-art facilities and production equipment.
- > Collaborative program delivery in partnership with educational institutions, labour or other industry/trade organizations.
- > Integrating required industry certifications into core training.
- > Encouraging flexibility and making training programs both accessible and affordable through hybrid delivery models.
- > Attracting in-kind industry contributions to help offset the high costs of training delivery.

Interviewees unanimously agreed that training by experienced industry professionals is essential to ensure students learn to navigate the many unique aspects of production and be prepared for success on set. Scenario-based hands-on learning combined with mock or real on-set experience was considered the best way to prepare students to succeed in film crew occupations. It was suggested that to start, Camosun's film crew training programs could target entry-level occupations that require the largest number of workers on a production (e.g. construction, production assistant, grip, lighting, costume and set decoration). Entry-level training for occupations in these departments is seen as a priority as these positions would offer the most job opportunities for graduates.

Collaboration and alignment with other post-secondary institutions and industry stakeholders was strongly recommended to ensure that training programs are not duplicated. Opportunities to complement and build on existing film crew training that has been developed by North Island College and Capilano University was also seen as being a critical success factor. Both institutions indicated a strong willingness to collaborate. Local production companies also indicated a willingness to partner in the delivery of regional film crew training and could provide on-set work experience for students and entry level jobs for new graduates.

To increase job readiness of the local labour force, it was suggested that Camosun act as a satellite institute on Vancouver Island for teaching entry-level motion picture certificate courses that all new film crew workers entering the industry must have (i.e. ACTSAFE – safety, MPIO, safety for supervisors). Short-term customized motion picture industry training could also be developed to reskill workers in related trade occupations (i.e. hair dressers, costume, security, catering, paint, greens, construction). Other industry training options, such as specialized master classes for experienced film professionals were suggested to expand local opportunities for professional development.

As well, interviewees regarded trades training in collaboration with local/community-based businesses as an excellent means of creating instruction capacities that simultaneously integrate industry with local business and community interests.

## Summary of Key Findings

Industry stakeholder opinions collected in the course of this research strongly reinforce the need for workforce development and investment in infrastructure to support regional growth of BC's motion picture industry on Vancouver Island.

A Centre for Film and Digital Media at Camosun College offers a new model of workforce development, one that combines an operating film studio with an education centre that can deliver creative and technical competencies required for high demand film occupations. By offering industry-led, competency-based film craft and trades training to entry level workers and mid-career industry professionals on Vancouver Island, Camosun can champion workforce development, introduce new pathways to education, and work collaboratively to address emerging labour priorities needed to sustain industry growth.

### ***Key Factors that Support the Business Case***

Based on our research, some of the key factors that support the business case for a Centre of Film and Digital Media at Camosun include:

- > Strong outlook for future growth of production in Greater Victoria.
- > Ongoing regional labour shortages in a wide number of production-related occupations.
- > Growing student demand for film and creative technology programs in BC.
- > Limited availability of studio infrastructure to meet increased production levels.
- > Growth in the number of experienced film professionals who live and work in Greater Victoria.
- > Willingness of labour unions to increase access and availability of local hires.
- > Opportunities to partner with educational institutions and labour organizations to leverage and further develop existing film crew training programs.
- > Desire and commitment by employers and broader industry to build a more diverse workforce and work collaboratively as a sector to tackle shared challenges.

Taken together, these factors highlight the opportunity for Camosun to work with industry to expand the training landscape for film crew occupations within the motion picture industry in BC. New models of learning and engagement are also needed to champion a more dynamic and inclusive workforce. Benefits of this new approach extend to students who would have opportunities to gain industry experience at a working production studio and to employers and labour unions that could provide critical input to industry training and workforce priorities, and access a growing regional film crew talent pool.



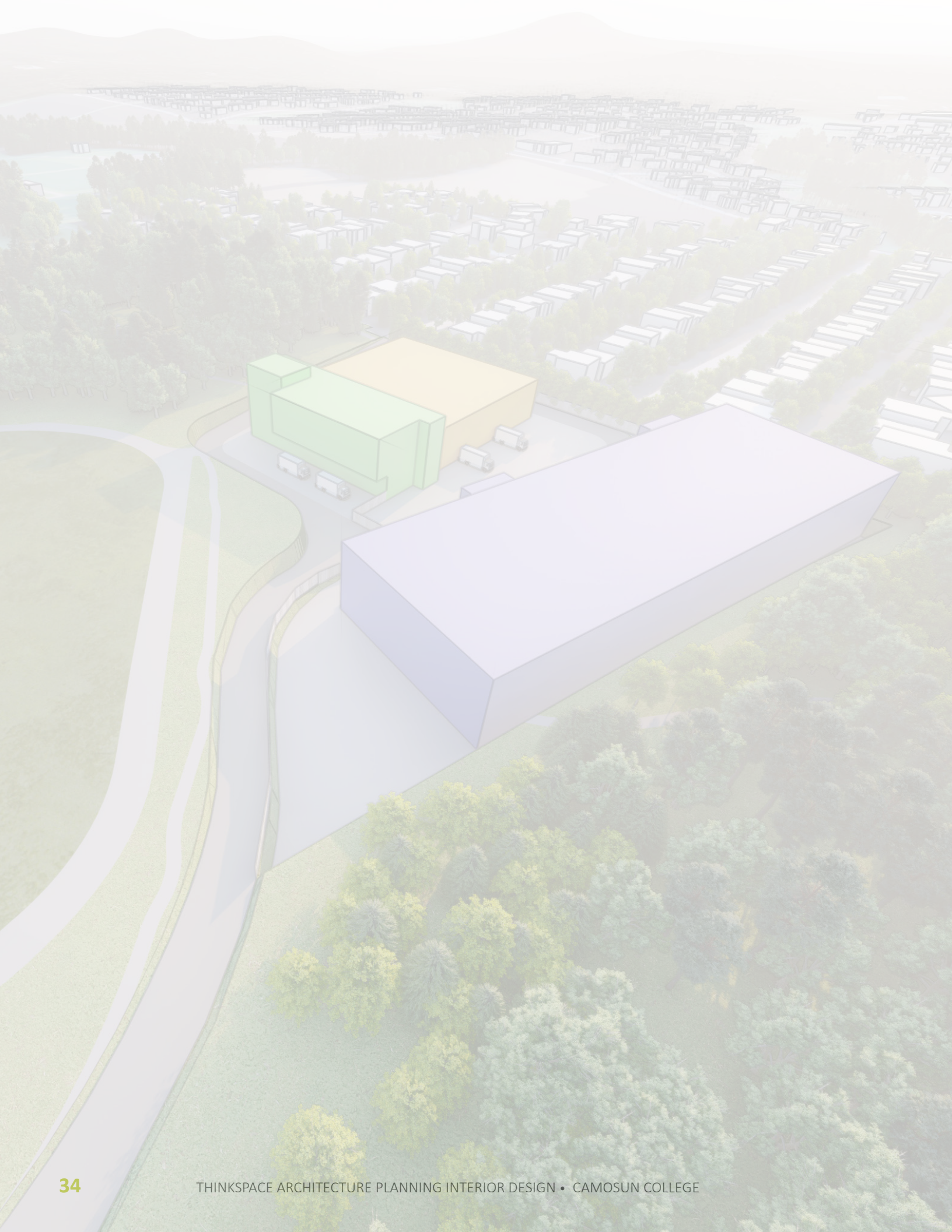
Co-locating industry education with operational studio infrastructure is a yet largely untried model in BC (and beyond) with few exceptions. Some interviewees commented that the operation of film studio and educational centre would need to be mutually exclusive, at least initially. However, this message is embedded in the context of rapidly shifting industry norms and practices that are being deconstructed by strong, current trends in creative pathways and workforce development policies. This work, driven from all sides by stakeholders engaged in the production industry, is setting up to broaden and equalize representation across the industry workforce. This trend, coupled with increasing general demand for skilled crew/trades, could lead to unprecedented cooperation among industry studio/production proponents and institutions driving local pipeline development in skilled industry trades and professions.

### ***Looking Ahead***

Even with the exceptional circumstances of the global health crisis that continues to play out nearly two years after its onset, BC's motion picture production sector continues its strong forward motion, demonstrating the resilience, cohesiveness and adaptability that has helped it to overcome industry challenges and continue to thrive. At the same time, if the historic growth trajectory in BC is any indicator, most industry stakeholders believe that ultimately BC's key regional production hubs – and especially Vancouver Island – must inevitably grow to alleviate oversaturation in the logistically favored Metro Vancouver production zone.

The global marketplace points to even more exciting times ahead in motion picture production worldwide. According to the Motion Picture Association (USA) 2019 Theme Report, the global theatrical and home mobile entertainment industry topped \$100 billion US for the first time in 2019, continuing a significant upward trend. The seemingly endless stream of global production business driving the growth trend in BC while positive, also brings inherent challenges, particularly with respect to BC's workforce capacity. Looking ahead, training and infrastructure development will continue to be a top priority to address and overcome arising gaps in BC's industry value chain.

A Centre for Film and Digital Media at Camosun College has the potential to grow the quality and quantity of skilled industry labour and encourage BC's motion picture industry to expand beyond its hub in Greater Vancouver, creating new jobs and business opportunities that can drive economic activity in BC and throughout Vancouver Island. Now is an opportune time in the history of BC's production industry to invest in needed infrastructure and industry training in Greater Victoria to generate the jobs, investment and new business opportunities that a skilled and growing motion picture industry workforce in British Columbia can provide.



# Section E - Options

## Concept Design

Camosun College is proposing a film campus and educational building at the Interurban campus, consisting of 3 sound stages, support and production offices, and a new classroom space to support film training program. Currently, the educational program does not exist, and the College sees this as an opportunity to create training programs and facilities to support a growing industry. This project is being developed with both education and film industry expertise to ensure optimum building requirements for both film and industry needs are met, as well as education requirements. This will allow the college to acquire opportunities for new revenue streams derived from new trades and technology educational programs, in addition to potential income from sound stage rentals.

The new Centre for Film and Digital Media Education will provide the following:

### ***Film Production***

- > Facilities to support a growing industry.
- > Purpose-built sound stages.

### ***Education***

- > Modern classrooms and computer labs for collaborative teaching methods.
- > Flexible and collaborative learning spaces for students both in and out of the classroom.
- > Suitable storage for equipment.
- > Staging areas for training programs.

# Campus Master Plan

In 2019, a new campus master plan was completed for Camosun College for both the Interurban and Lansdowne campuses. The purpose of this plan is to guide the long-term planning of Camosun's campuses. It is a document that is intended to inform college decisions in a manner that continually builds toward the outcomes envisioned, to support and enhance the high-quality core elements of the existing campuses. While the campus master plan did not necessarily consider a film campus, the plan did anticipate future growth at the south end of the campus. The master plan serves as a framework approach allowing for a variety of program and building types to be added to the campus over time as needs evolve.

## Project Objectives

The planning process has established several design and programmatic objectives for the project:

### *Design Objectives*

1. To provide a 21st century learning and film facility that meets the educational needs for Camosun College.
2. Provide appropriate, functional, safe, accessible learning spaces to meet anticipated needs.
3. To create a strong identity and sense of place for film industry training.
4. Strengthen the image of Camosun College as a leading institution in the growing film industry.
5. Optimize a healthy learning environment with natural light, attention to air quality, etc.
6. Ensure the plan is consistent with, and supports the Camosun College Master Plan.

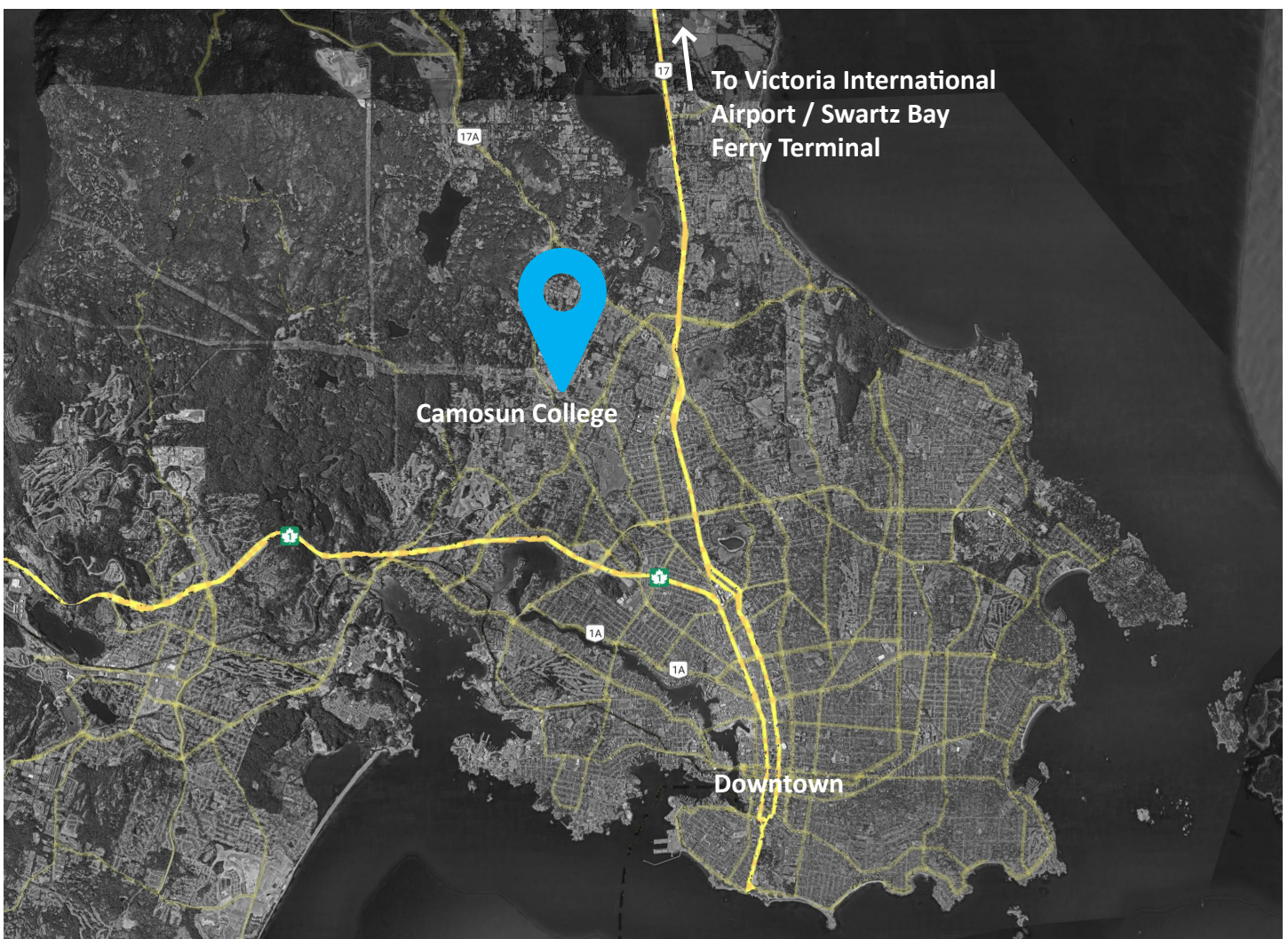
### *Programmatic Objectives*

1. Ensure student learning and programs maintain and improve opportunities for student populations in the work force.
2. To ensure the program supports labour market demands for emerging and growing professionals.
3. To ensure program continuity with existing trades programs.
4. Create more opportunities for partnerships.
5. Draw new students, provide upskilling to recent graduates, provide a direct pathway to employment.

## Site and Location

### ***Regional Context***

The site is centrally located in the region, being approximately 25 minutes driving time to both Victoria International Airport, Swartz Bay Ferry Terminal and downtown Victoria.



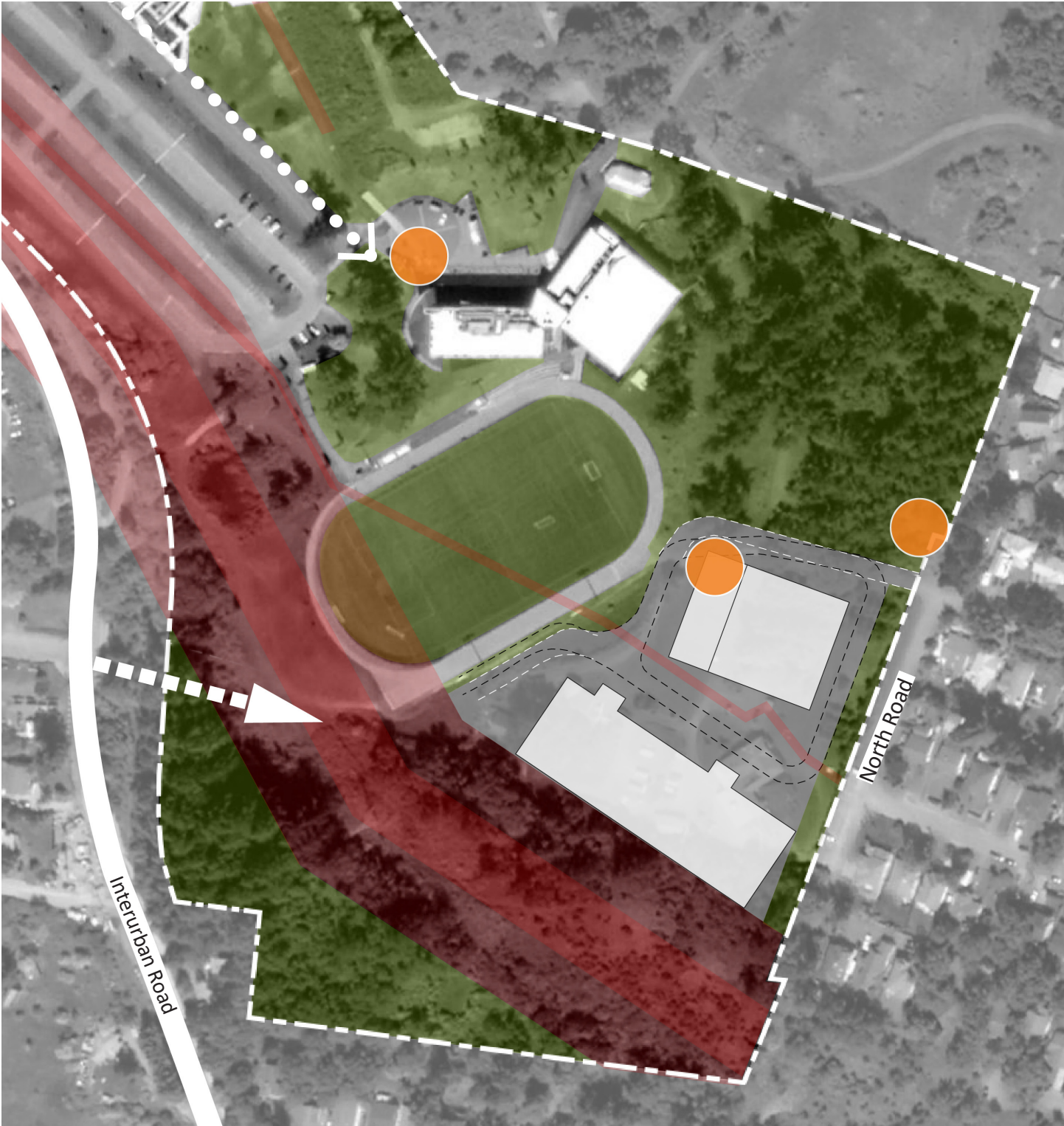
Regional Context

### **Campus Context**

The proposed Centre is located on the south end of the Interurban campus. With the college's strong technology and trades programs already at Interurban, a film campus of this scale complements the current campus programming and provides opportunities to develop specific curriculum to train workers for the film industry. This project will maximize the campus lands at this location, which under the current campus master plan is not planned for development for many years.



Interurban Campus



Proposed Site and Location, Interurban Campus

# Section F - Financial Analysis

## Capital and Operating Budget Development

A preliminary capital budget has been prepared by Advicas Group Consultants. An operating budget for the studio will be developed by the studio operating proponent once they have been identified.

Camosun will develop a separate operating budget for the education programming to be offered both on the and off the studio site. The principal objective for Camosun will be to offer relevant programs leading to well paid jobs in the film industry with the requirement to generate a small revenue to the college's bottom line after tuition expenses and overheads.



# Section G - Stakeholders

## Consultation

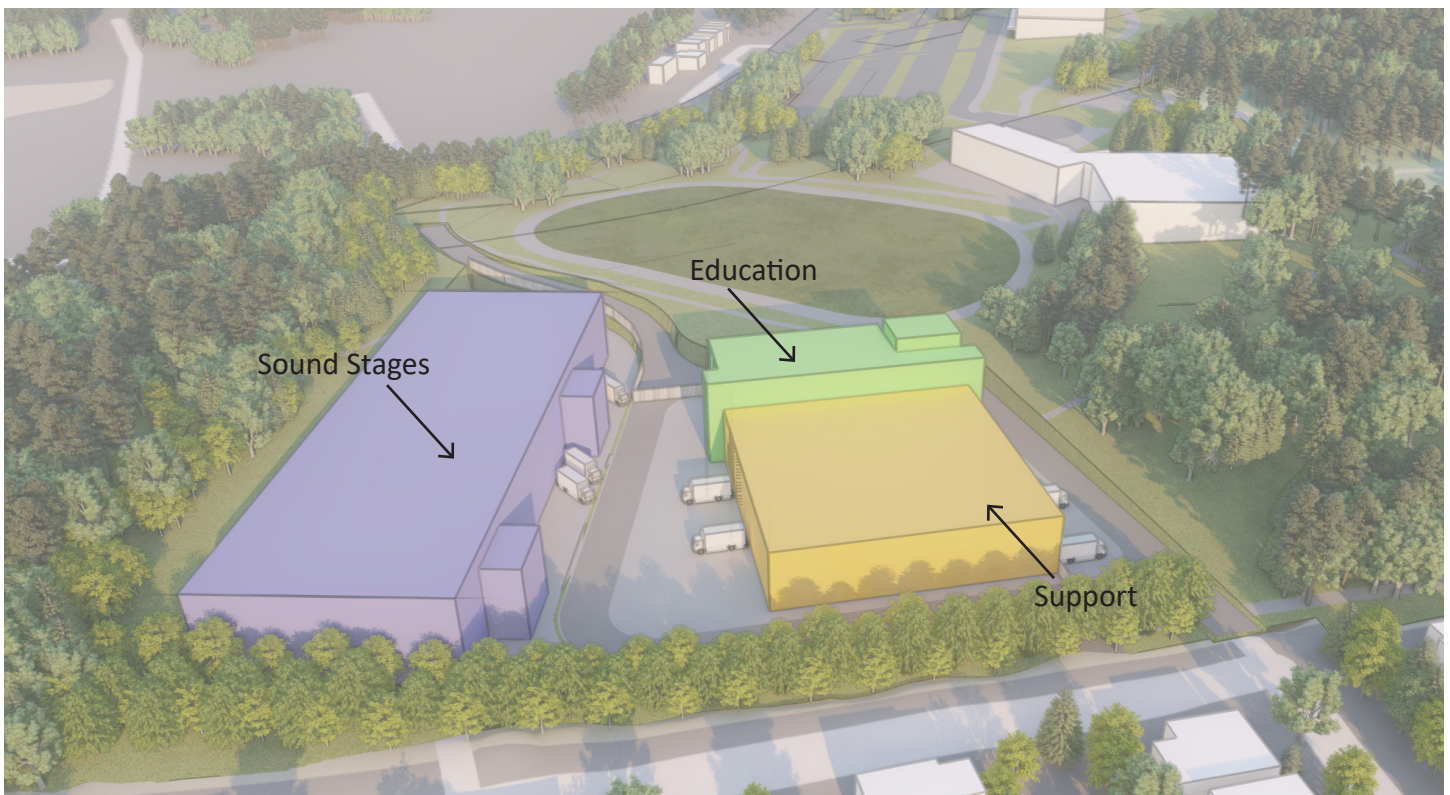
Twenty-one industry stakeholder (group or individual) interviews from across the spectrum of motion picture industry subsectors were conducted between July 15 and September 15; anecdotal opinions were also collected from additional stakeholders, and corresponding research/analysis across existing industry data sets was also carried out.

Key sectors polled in stakeholder interviews:

- > Primary Industry Labour Organizations
- > Studio Owner/Operators
- > Specialized Equipment Supply
- > Domestic & International Producers
- > Animation & Visual Effects/Digital
- > Industry Educational Institutions
- > Pertinent Government Partners

# Section H - Operations

Studio operations will be managed by an experienced third-party company with experience in the film industry. Camosun will retain oversight of studio operations through membership in the studio governing body. Education operations on the studio site will be the responsibility of Camosun and will remain separate from the studio operations.



# Section I - Risk Assessment

Below is a summary of key project risks :

## Centre for Film and Digital Media Education Risk Register

	5	5	10	15	20	25
PROBABILITY	4	4	8	12	16	20
	3	3	6	9	12	15
	2	2	4	6	8	10
	1	1	2	3	4	5
		1	2	3	4	5
	IMPACT					

RISK DESCRIPTION	IMPACT DESCRIPTION	IMPACT LEVEL	PROBABILITY LEVEL	PRIORITY LEVEL	MITIGATION NOTES	OWNER
Give a brief summary of the risk.	What will happen if the risk is not mitigated or eliminated?	Rate 1 (LOW) to 5 (HIGH)	Rate 1 (LOW) to 5 (HIGH)	(IMPACT X PROBABILITY) Address the highest first.	What can be done to lower or eliminate the impact or probability?	Who's responsible?
Zoning and building height	There is precedent with Saanich about exceeding building height on the Interurban campus	5	2	10	Early discussions with District of Saanich	Consultant/Camosun
Glendale Lands covenant	Projection of sound stage and road into current covenants	5	3	15	Review and modifications required to the previous	Camosun
BC Hydro connections and Hi Tension constraints	Road alignment, site access, setbacks for buildings	5	1	5	The viability of the impact and the high tension lines has been reviewed during the business case. continue to document and monitor design	Consultant
Surrounding Environment	Neighbouring community impact and concerns with height and adjacent land use for film studio	2	1	2	Set up early community engagement sessions	Camosun
Trees and environment	Trees will need to be cleared for the new entry road	5	2	10	Survey of trees impacted, obtain arborist report	Camosun
Parking		5	2	10	Parking plan for the academic and film studio. Leverage TDM from masterplan to reduce parking	Camosun/Consultant
Building and site grades	The business case was based on contours from a survey provided during the master plan stage	3	1	3	Begin survey work early in the process to confirm indicative design grades relate to actual current grades	Camosun/Consultant
Building design meeting academic needs and standards	Academic buildings require a particular level of design, finish and quality	2	2	4	ensure clear description of quality, assemblies to be used for academic building space	Camosun/Consultant
Sustainability requirements	Achieving BC step code and beyond LEED Gold has cost impact	4	2	8	Ensure targets for sustainability are clear to builder	Consultant/Camosun
Soils Conditions	Unknown soils conditions and impact on footings, structure and roadway infrastructure	5	3	15	complete geotechnical review and engage structural engineer to review footing options and compare to business case budgets	Consultant/Camosun

KEY

LEVEL

1
2
3
4
5

# Section J - Implementation Strategy

## Procurement Method

Key Criteria for determining a procurement method:

- > The potential to “fast-track” the project for early accommodation of new film production training.
- > Competitive pricing and certainty of construction costs.
- > Ability to manage construction.
- > High level of design control to ensure the specific requirements of both the film production and education needs are met.

Camosun will complete a structured assessment of procurement methods to determine the optimum method for delivering these key criteria.

## Preliminary Schedule

A preliminary schedule has been included to identify next steps for the project. These steps include:

- > Site - further site review to identify and minimize risks on site and impact to proposed buildings
- > Engagement - engagement with key stakeholders
- > AHJ and Zoning - review and define approach with the District of Saanich
- > Procurement - review procurement methods
- > Building - schedule for design and construction

\*See following page for schedule.

# Camosun Film Studio

November 29, 2021

## Next Steps Schedule

		2022				2023				2024			
		1	2	3	4	1	2	3	4	1	2	3	4
<b>1.0 Site</b>													
1.1	Survey												
1.2	Review existing site grades with business case design grades												
1.3	BC Hydro applications concluded												
1.4	Trees and environmental impact report initiation												
1.5	Trees and environmental report												
1.6	Parking plan initiation												
1.7	Parking plan report												
1.8	Geotechnical investigations												
1.9	Review Impact on footings, shoring, cut and fill												
1.10	Structural review and recommendations for footings												
1.11	Review Sustainability requirements												
1.12	Costing updates												
1.13	Review lease of current buildings on site												
<b>2.0 Engagement</b>													
2.1	Review and confirmation of business case design by Camosun												
2.2	Map all stakeholders, and discuss their roles and responsibilities												
2.3	Develop a plan for community engagement												
2.4	Townhall 1												
2.5	Townhall 2												
<b>3.0 AHJ and Zoning</b>													
3.1	Review access roads with AHJ												
3.2	Agreement in principle on process with AHJ												
3.3	Agreement in principle on building height and zoning												
3.4	Agreement in principle on approach to parking												
3.5	Agreement in principle on sustainability requirements												
3.6	Define approach to modification of Glendale land agreement												
3.7	Legal modification to Glendale land agreement												
<b>4.0 Procurement</b>													
4.1	Review design build approach with procurement												
4.2	Further refine parameters of indicative design for EOI/Design Build												
4.3	Define Approach to Quality control: determine internal peer review												
4.4	Document standards and specifications for academic space												
4.5	Determine and document deliverables by Camosun vs builder												
4.6	Investigation of potential builders												
4.7	Public EOI - call for expressions of interest based on business case scope												
4.8	Develop design build agreement												
4.9	Review EOI submissions												
4.10	Initiate design build procurement with one or up to three proponents												
4.11	Receive bids and evaluate pricing												
4.12	Award contract to design builder team												
<b>5.0 Building</b>													
5.1	Site works and mobilization												
5.2	Monitor construction and progress payment												
5.3	Bi weekly site meetings												
5.4	Quality control and review of project												
5.5	Select preferred contractor and finalize final contract												
5.6	Occupancy												

## Governance Structure

The studio governance structure will be determined through negotiations between Camosun College, the studio developer and operator. Camosun expects to retain the right to have representation on a studio oversight body as part an agreement to operate a studio on its campus.

