



# Business Plan

2024 - 2025

Approved by the Board of Directors on December 13, 2023

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## EXECUTIVE SUMMARY

The Ontario Heritage Trust (OHT or the Trust) is an agency of the Ministry of Citizenship and Multiculturalism (MCM) with a provincewide mandate to conserve, interpret and share Ontario's heritage.

The Trust is a Commission Public Body, property owner, steward, lessor, business operator, attractions operator, conservation partner and sector leader. It is an enterprise agency with a proven business model and a diversified revenue base that operates efficiently and effectively, providing value for money to taxpayers. In delivering its legislated mandate, the Trust offers a range of programming and activities, delivered in collaboration with public and private sector partners, designed to tell Ontario's stories, conserve provincially significant heritage sites and leverage the province's investment in supporting communities across the province.

The Trust collaborates with partners in urban, rural and remote communities throughout Ontario. The Trust conducts programs and activities that are accessible to approximately 85 per cent of Ontario municipalities and 99 per cent of the people of Ontario directly in their own communities. The Trust works to ensure that its programs are aligned with its strategic direction and mandate, and that programs are accessible, equitable and integrated, and provide good value for money.

Trust programming effectively promotes diversity and inclusion, reconciliation, and anti-racism initiatives by providing access to all. It also builds a sense of belonging in communities, boosts civic pride and volunteerism, contributes to local economies, supports tourism, delivers educational activities, and builds engagement in and community capacity for celebrating and promoting heritage.

### Key impacts

As of December 2023, key impacts of the Trust included:

#### Community outreach and programming

- Welcomed over 500,000 participants to our sites and programs
- Promoted anti-racism and diversity through inclusive interpretation of history, commemoration activities and events
- Engaged with 85 per cent of Ontario's municipalities
- Strengthened collaborative relationships with Indigenous communities
- Created and launched public education initiatives that provided space for Ontarians to share their heritage perspectives
- Contributed to the quality of life of Ontarians and supported economic resiliency in local and regional communities

#### Protection of Ontario's heritage

- 7,378 hectares (18,232 acres) of environmentally sensitive lands protected
- 189 properties owned and conserved by the Trust
- 251 easement properties conserved
- Nearly 1 million archaeological artifacts and over 25,000 cultural artifacts related to Trust properties managed and interpreted
- The Trust has researched, developed and unveiled approximately 1,290 provincial plaques since 1956

## **Sector resilience and engagement**

- Raises over 65 per cent of its yearly gross revenues, helping to provide economic stability in the heritage conservation and tourism sectors
- Supported by nearly 3,000 volunteers
- Nearly 36 million annual social media impressions
- Social media fan base of more than 32,000 followers

## **Annual visitation snapshot**

### *The Elgin and Winter Garden Theatre Centre*

- Nearly 7,500 visitors at Doors Open Ontario (DOO) in 2023
- Over 75,000 patrons for theatrical events from April to September 2023

### *Fulford Place*

- Nearly 4,000 visitors in attendance

### *Niagara Apothecary*

- Over 55,000 visitors in attendance

### *Josiah Henson Museum of African-Canadian History*

- Nearly 5,000 virtual and in-person visitors

### *DOO in-person programming*

- 22 in-person events, complemented by 276 digital DOO sites and ~1 million page views

Government-wide commitments for board-governed provincial agencies, such as the Ontario Heritage Trust, include the following key priorities for 2024-25:

- Competitiveness, sustainability and expenditure management
- Transparency and accountability
- Risk management
- Workforce/Labour management
- Diversity and inclusion (*Josiah Henson Museum of African-Canadian History, collaborating with Indigenous communities, working with racialized communities, "Expanding the narrative" web content and addressing outdated plaques*)
- Data collection, sharing and use
- Digital delivery and customer service (*OHT website refresh and geomapping tools*)

In addition to supporting the government priorities noted above, the Trust also supports MCM with the following areas of focus:

- Continuing to provide key services (*through our three pillars of Conservation and stewardship; Telling Ontario's Stories: Commemoration and interpretation; and Business development and revenue generation*)
- Red Tape Reduction
- Doors Open Ontario (DOO)
- Focusing on in-person programming (*including DOO, museum programming and plaque unveilings*)
- Ontario Heritage Act (OHA)
- Public events/communications
- Economic growth and development
- Addressing direction related to the Community Jobs Initiative (CJI) and Centralization of Broader Real Estate Authority (CBREA)

## **Background**

The Trust continues to build on years of thoughtful examination of the agency's legislated mandate — how and for whom it is delivered and why it matters to Ontarians. The results are noteworthy. It is an agency that is focused and accountable, continually and successfully diversifying its revenue base, and following a proven and demonstrable plan for long-term sustainability.

By leveraging funds the Trust receives from the Province of Ontario, it has earned, on average, 65 per cent of its yearly gross revenues. We work in 85 per cent of Ontario municipalities (and with an increasing number of Indigenous communities) protecting land and easement properties, providing educational programming and visitor experiences, and building conservation capacity. This work contributes significantly to the quality of life of Ontarians and engages the interest of Canadians within the province and beyond. This work also supports economic growth in local and regional communities.

The Trust's programs and activities for 2024-25 are organized into three pillars:

- 1. Conservation and stewardship**
- 2. Telling Ontario's stories: Commemoration and interpretation**
- 3. Business development and revenue generation**

This work supports the Trust's legislated mandate, directly supports Minister Ford's Letter of Direction and integrates Ministry priorities in operational approaches leading to accountable performance measures and programming. The Trust's work supports the government's intent to conserve and commemorate key places with heritage significance, all in the context of promoting sustainable development. Its heritage work gives shape to providing a sense of belonging, contributes to the well-being of Ontarians and provides economic, educational and numerous social benefits to support MCM goals.

The broad reach of its programming and partnerships across the province has uniquely positioned the Trust to lead the culture and heritage sectors moving into 2024-25. It is leading by example, showcasing and role-modelling innovative business approaches. The Trust can contribute further by providing spaces and opportunities for its partners to continue to function and grow moving forward through the pandemic recovery period.

Additionally, the Trust is home to a dedicated and talented team of specialized staff, each directed at optimizing its organizational capacity to support the best possible public service delivery. Specialized staff who have the expertise and experience in areas such as archaeology, communications, cultural heritage, finance, fundraising and natural heritage are required to ensure that the Trust meets the agency's broad mandate and legislated responsibilities.

## **Continued rebuilding into 2024-25**

The Trust will continue to support the sustainability of the sectors with which it works and strive towards the continued rebuilding of Ontario's economic recovery. The Trust works in partnership with commercial and not-for-profit organizations, tenants, sponsors and donors whose viability and recovery will be critical to its success.

The Trust creates strong relationships with corporate sponsors and foundations, whose support is important for the delivery of core programs. It will work to expand support from corporate sponsors, philanthropic foundations and individual donors, to explore naming rights opportunities and to leverage the key role of the Board of Directors in supporting fundraising.

Looking ahead, the Trust's business model remains a solid foundation to build on. The Trust will continue to identify new revenue-generating opportunities, and, with continued government guidance, it will serve as a leader in rebuilding the economy while sharing Ontario's stories.

The Trust works within a constantly changing environment and marketplace. As a transformation-focused agency, however, the Trust has abundant experience in planning and adapting. It reacts efficiently and with purpose, all directed to conserving and stewarding Ontario's heritage.

## **STRATEGIC DIRECTION (2020-23)**

### **OUR MANDATE**

The Ontario Heritage Trust has a provincewide mandate to conserve, interpret and share Ontario's heritage. The Trust acts as a centre of expertise and serves as the heritage trustee and steward for the people of Ontario. The Trust conserves provincially significant cultural and natural, tangible and intangible heritage, interprets Ontario's history, celebrates its diversity and educates Ontarians on its importance in our society. [*Ontario Heritage Act, R.S.O. 1990*]

In September 2023, following the retirement of the Trust's CEO, the Ontario Heritage Trust's Board of Directors extended the Strategic direction (2020-23) for one year to allow for the recruitment of a new, permanent CEO. The Strategic direction will be updated thereafter, to reflect the Strategic direction (2024-26).

### **OUR VISION**

The Trust envisions an Ontario where we conserve, value and share the places and landscapes, histories traditions and stories that embody our heritage, now and for future generations.

### **OUR MISSION**

- Demonstrate excellence in the conservation and stewardship of places and landscapes, objects, traditions and stories
- Expand the narrative, spark new conversations, give voice to the diversity of Ontario's people and places
- Share knowledge and expertise while fostering an understanding of our histories and heritage in everyday life
- Build mutually rewarding relationships with new and current partners

### **OUR VALUES**

1. Integrated approach to conservation
  - Integrated approach to conservation and stewardship of cultural, natural, tangible and intangible heritage
  - The centrality of heritage conservation in the effective stewardship of the environment and in the creation of sustainable and resilient communities
  - Landscapes of memory, storytelling, tradition and language as irreplaceable heritage resources of cultural significance

2. Respect and inclusion
  - Inclusive, multi-faceted representations of the province's heritage that reflect our diversity and complexity
  - The discovery, knowledge and insight generated by cultural heritage fosters cultural affiliation and reconciliation and enables us to understand ourselves better
3. Inspiration and innovation
  - The potential of heritage to inspire, stimulate creativity and motivate us to bequeath knowledge, narratives and histories, and a diverse and authentic cultural environment for future generations
4. Co-operation and collaboration
  - Mutually rewarding relationships with new and current partner organizations
  - Create partnerships to build and enhance conservation capacity in communities
5. Public good
  - Holistic, sustainable planning that serves the public good and establishes a sense of place, civic identity and permanence
  - Empowering partners and individuals to be conservation leaders in their own communities

## ENVIRONMENTAL SCAN

### Internal

- The Trust continues to collaborate with its partners to overcome the lingering economic and social impacts of COVID in terms of revenue generation, stability of partnerships, volunteer support and site and program visitation.
- In-person programming is a priority. Digital communication is also a key programming tool that expands the Trust's reach to remote and rural communities and new audiences. Moving into 2024-25, the Trust is working to find the balance between in-person offerings and continuing digital programming access to resource these program areas appropriately. Digital offerings allow us to expand our outreach beyond our physical site locations. This is a significant benefit, as many of our sites are in remote regions of the province. But this additional virtual visitation also stretches the capacity of site staff.
- The Trust has a broad mandate, and it serves numerous audiences. As such, it needs to ensure that information technology resources, priorities, and tactics are aligned to deliver this broad mandate to these many audiences.
- The Trust has completed an in-depth review of a significant portion of its property portfolio and provincial plaques. The Trust has a current and complete understanding of these key areas of its work, providing a solid base for strategic planning.
- A portion of the Trust's property portfolio is lacking in current and detailed information (including Building Condition Reports and Baseline Documentation Reports, as examples). The Trust is working to acquire additional information on these properties to support planning activities and capital requirements.
- The Trust has opportunities to align educational and programmatic offerings to course curricula, expanding the opportunities for sharing and engagement.

- As many groups continue to struggle to recover in our post-pandemic world, the Trust has a role to play in supporting smaller not-for-profit organizations, particularly those representing Black, Indigenous, and People of Colour (BIPOC) and Lesbian, Gay, Bisexual, Transgender, Queer or Questioning, and Two-Spirit (2SLGBTQIA+) communities and Indigenous groups.

## External

- Ontario is a diverse province and home to Canada's most multicultural population. The Trust is working to ensure that its sites and programs are inclusive and serve Ontario's diverse society.
- Ontario is focused on supporting vibrant and inclusive communities and fighting racism and hate. The Trust's efforts to collaborate with communities to share inclusive, honest and authentic representations of our heritage provide an opportunity for leadership in the sector. This leadership is seen in the Trust's *Expanding the narrative* web content, the new direction of the provincial plaque program, increased focus on organizational diversity and anti-racism efforts.
- Legislative changes since 2020 have been impactful, particularly in respect to the Conservation Authorities Act. Some of the Trust's conservation authorities' partners have been removing themselves from responsibilities related to natural heritage management since these changes were made, directly impacting Trust operating partnerships.
- Lack of grant support for heritage conservation, declining memberships and changing operational needs in partner organizations, along with deferred building maintenance, have resulted in a marked increase in requests to heritage organizations for technical support, funding support, annual funding for stewardship, and pressure on its site partnerships.
- Municipalities in Ontario continue to face a variety of challenges both coming out of the pandemic, as well as from a variety of other global challenges, including inflation, rising interest rates and labour shortages, among other challenges (see <https://www.amo.on.ca/policy/finance-infrastructure-and-economy/municipal-finance-background>). With the Trust's reliance on municipal partners to steward properties and deliver programming, this work will be impacted by these ongoing constraints.
- In *June 2023*, the *National Trust for Canada* commissioned an updated survey to seek Canadians' views on heritage places and the field of heritage conservation. Eighty-nine per cent agreed with the importance of preserving heritage places and sites. When asked which heritage conservation subjects are of interest, the general population ranked as their top three: the beauty of historical architecture and landscapes, significant buildings and structures, and reusing older buildings instead of demolishing them. The survey also indicated that heritage is seen as an important part of individual and collective identities.
- Developing and evolving digital programming toward emphasizing various forms of interactivity may be the key to engaging the younger audiences that the Trust needs to maintain the social relevance of engaging the next generation in preserving our heritage.
- Younger cohorts of the population are interested in exploring the connection between heritage conservation and climate change.
- Expanded use of the Trust's trails and natural areas to support physical and mental health may result in increased demands on site maintenance, visitor amenities and operating partnerships.
- The Trust's revenue streams have been adversely impacted by a variety of factors — the slow return of live theatre, film industry strikes, slowing charitable donations, and high real estate vacancies.
- As of the first quarter of 2023, real GDP for the live performance domain was still 5.3 per cent away from its pre-pandemic level. (Source: *Statistics Canada*, [Table 36-10-0652-01 National culture and sport indicators by domain and sub-domain](#), real GDP (constant 2012 dollars), seasonally adjusted, released: 2023-08-09.) The Canadian Association for the Performing Arts



(CAPACOA) considers the industry to be out of the recovery phase and in a “new post-COVID reality,” meaning that whatever distance between pre-COVID levels that exist will remain constant. (Source <https://capacoa.ca/en/research/covid-impact-statistics/#attendance>)

- The *New York Times* reported in their August 21, 2022, article, *Live Performance Is Back. But Audiences Have Been Slow to Return*, that audience numbers are down by as much as half. A North American study by *TRG Arts* found that ticket sales were down by 40 per cent from pre-pandemic numbers. A report by *Wolf Brown’s Audience Outlook Monitor* corroborates this, stating that 15-20 per cent of non-returning audience may never return. In Ontario, *Wolf Brown’s surveys* were conducted through the *Ontario Arts Council*.
- Currently, there are an estimated 170,000+ charities and non-profits in Canada, clearly creating intense competition for charity support.
- According to The Status of Canadian Fundraising 2023 Benchmark Report, the top three concerns for fundraising are the challenging economy, retaining and recruiting talent, and “communicating the cause” in relevant ways.
- Giving participation rates (that is, the per cent of Canadians who claim charitable donations on their tax returns) have been falling for decades. As published in the 30 Years of Giving in Canada report by Imagine Canada and the Rideau Hall Foundation, the aggregate giving participation rate sat at 29.5 per cent in 1990. By 2010, it had dropped to 23.4 per cent, and in 2020 it dropped to 18.4 per cent. This change represents an alarming 11.1 percentage point drop in 30 years, with almost half of the drop, five percentage points, in the last 10 years alone.
- A slight improvement in giving participation rates by Canadians under 25 years of age is apparent, but the same is not true for those aged 25-34, 35-54 and 55 and older where there is a drop of 5.7, 6.3 and 5.0 percentage points respectively.
- Volunteer programs that existed prior to 2020 report that the total number of active volunteers in the last year is below pre-pandemic levels, with 22.4 per cent reporting that total active volunteers are significantly below pre-pandemic levels.
- The shrinking of the volunteer sector (as volunteers lose interest and get older) is driving the need for the Trust to engage with innovative technologies to meet visitor demand at public sites.
- Overall, Canadian office vacancy rates have continued to rise, reaching a new high of 18.1 per cent, a level not seen since 1994.
- Many real estate managers have been reducing their portfolio allocations to the office sector. This trend is influenced by the reduction in office demand and the growing trend of converting office buildings to residential spaces.

## KEY DELIVERABLES

The Trust’s key deliverables follow the five strategic themes that were developed for the 2020-23 Strategic Plan. These key deliverables fulfill the following seven goals:

1. Build an equitable Ontario and promote a sense of belonging
2. Foster sustainable economic growth while actively supporting the government’s anti-racism and inclusion initiatives
3. Support a resilient cultural fabric that reflects the diversity and strength of Ontario’s communities
4. Modernize delivery of the mandate with new operating models, digital delivery options, innovative collaborations and community partnerships
5. Contribute to the continued recovery of the tourism, heritage and live theatre sectors
6. Contribute to the Trust’s business lines

## 7. Address government priorities

### **Strategic theme #1: Lead**

- Provide leadership in the areas of archaeology and cultural and natural heritage conservation.
- Continue to deepen and strengthen partnerships to meet the needs of communities and help Ontarians connect to their shared history and heritage. Lead inclusive partnerships that support community conservation, build citizenship and civic pride.
- Invest in anti-racism programming and work with the Black communities and Indigenous communities. Address older provincial plaques that include outdated language and terminology.
- Complete research and consultation on priority plaques for replacement by the Board of Directors and identify further plaques for replacement in future years through community consultations. Continue to develop website materials for Board-approved priority topics that provide historical summaries and context regarding the place of these subjects in public history and facilitate the sharing of diverse perspectives.
- Explore options to enhance and expand the provincial plaque program, including costs and staff resources.
- Build and maintain relationships with Indigenous communities to support the protection and celebration of Indigenous heritage and to promote understanding among all Ontarians.
- Support the Government's commitment to protect and commemorate burial areas at former Residential Schools in Ontario. Support the efforts of others in the Government who are leading the creation and maintenance of memorials at sites of former residential schools.
- Continue to showcase the Elgin and Winter Garden Theatre Centre (EWG) as a cultural hub and vital venue for live performance in the city and province.
- Continue development of adaptive reuse resources on the website. Demonstrate the Trust's leadership role and noteworthy results in adapting heritage buildings for reuse (examples include the Ontario Heritage Centre, the Elgin and Winter Garden Theatre Centre and George Brown House).
- Demonstrate the Trust's leadership role as a centre for heritage information and expertise, providing online tools, contributing to conferences and workshops, collaborating with partner agencies on the delivery of government priorities.

### **Strategic theme #2: Conserve**

- Actively conserve and steward Trust lands, cultural landscapes and cultural resources.
- Effectively administer the Conservation Easement Program to support conservation of cultural and natural heritage easement properties.
- Demonstrate an ongoing commitment to investing in conservation.
- Complete phases one and two of the Strategic Conservation Plan, as approved by the Board of Directors, and implement phase three, which includes the acquisition of priority archaeological properties, research related to BIPOC heritage, women's history and 2SLGBTQIA+ heritage, and implementation of community consultations on the plan; and survey, assessments and feasibility studies to support the identification of properties for potential acquisition in the future. Conduct research and feasibility studies to support the development of further phases of the Plan.
- At the Ellis Property, reopen access to the greenspace by restoring slopes, completing vegetation plantings, and re-opening a former trail on the Ellis property to connect Jordan Village and the Ball's Fall's Conservation Area. The Trust has made it a priority to collaborate with Indigenous stakeholders — such as Plenty Canada, Niagara Regional Native Centre, and the Mississaugas of the Credit First Nation — to establish a series of historical signs that speak

to the history and significance of local Indigenous presence in Niagara that has been underrepresented.

- Continue expansion of technological solutions to asset management systems, including the expanded use of GIS to meet property information requirements, with opportunities to share information publicly. Conserve, manage and present the Trust's cultural and archaeological collections and holdings. Work with external consultants to develop a long-term collections storage plan for OHT collections.
- Deliver the capital program through strategic capital investments that ensure conservation, address public health and safety, and support commercial viability and sustainability. Use new models for property stewardship and make strategic investments to stabilize stewardship and operating partnerships to ensure their viability in the long term.
- Implement the Board-approved plan to address issues related to the management of Trust properties with conservation authorities. Implement a new operating model at the Cheltenham Badlands.
- Continue to collaborate with Indigenous communities for the protection of sacred lands and culturally significant places, including Nochemowenaing, Moose Factory, Cahiague, Cummins, Fennel, Ellery, Hunter's South Orillia #14 and Allen.

### **Strategic theme #3: Educate**

- Showcase the uniqueness and diversity of the province's tangible and intangible heritage through inclusive, authentic and innovative programming.
- Continue to expand and enhance Doors Open Ontario to educate the public on the province's heritage and to promote local tourism and engage all Ontarians in the work and promotion of heritage conservation.
- Work with community organizers and faith groups to encourage places of worship to participate in local DOO events. Promote awareness of participation of places of faith in DOO as part of the DOO promotional campaign.
- Expand digital programming to engage new audiences, highlight multicultural content and remove geographic and socio-economic barriers to participation.
- Expand the narrative of Ontario's heritage and create opportunities for Indigenous and racialized communities to tell their stories through publications, provincial plaques and online exhibits. Some of the major deliverables, which have been approved by the Board, include updates to priority plaques and web resources for priority themes.
- Moose Factory: after completing the exterior restoration and interior conservation project at the Hudson Bay Staff House, per the Parks Canada Cost-share Program, in 2024-25, the refresh and restoration of Centennial Park will begin, starting with the initial site planning and schematic design work for tender documentation, in collaboration with the Moose Cree First Nation and Trust consultants.
- Use the Trust's geographically diverse sites, respected programs, informational websites, and impactful social media channels to deliver the interpretive theme for 2024.
- Continue to modernize museums and public sites with self-guided tour opportunities, based on the 2023 pilot program.
- Explore the expansion of facilities and programming at the Josiah Henson Museum of African-Canadian History.
- Support mentoring, youth employment and partnerships with educational institutions.
- Building on work done in 2023-24, commemorate the gravesite of former Premier William Davis in co-operation with the family, the cemetery board and other appropriate stakeholders, as approved by the Board of Directors.

- As part of the Minister’s consent regarding the First Parliament archaeological site in Toronto, Trust staff are working with Metrolinx on an Interpretation and Commemoration Plan (ICP) for the future subway stop. This plan will be completed in fiscal 2024-25 and guide design work at the subway station as well as interpretive materials outside the building.

#### **Strategic theme #4: Inspire**

- Enhance existing partnerships and build new ones to invest in community conservation.
- Administer the Lieutenant Governor’s Ontario Heritage Awards, celebrating the people and projects making exceptional contributions to heritage conservation, environmental sustainability and biodiversity, and cultural and natural heritage.
- Celebrate the EWG as a vibrant cultural asset and create opportunities for access at multiple points of entry — through partnerships, public programming and imaginative community relationships. Add programming opportunities to activate the lobby spaces, expand and elevate the public tour program using professional guides and enrich the Doors Open Ontario experience at the venue in addition to standard paid theatre events to engage a broader audience community.
- Welcome audiences to the EWG and engage with them through diverse, artistic offerings and varied programming. Become a “venue sponsor” to support exceptional artistic work by new Canadian artists and producers to assist them in expanding their audience capacity and ability to create work on the scale of the EWG. Offer reduced studio rental rates to Toronto-based independent creators to fill gaps in the rental schedule and support the creation of new work while maximizing the use of the space.
- Provide exceptional customer service to all user groups, including patrons and clients.
- Improve the user experience to grow the Trust’s brand and online presence and position the Trust as the centre of knowledge and expertise in the heritage sector.
- Expand the Case for support to engage new sponsors and donors in the work of the Trust.
- Secure sponsorship support for the EWG, the Doris McCarthy Artist-in-Residence Program and Doors Open Ontario.

#### **Strategic theme #5: Excel**

- Support the 2024-25 mandate review of the agency.
- The Trust has been identified in the Centralization of Broader Real Estate Authority (CBREA) as a “complex/integrated” entity. Continue to work with the process of the implementation of phase two of the initiative, as required.
- Work with the implementation of the Community Jobs Initiative (CJI), as required.
- Demonstrate high standards and best practices of good governance, transparency and accountability.
- Act in the best interests of Ontarians by being efficient and effective, and by providing value for money to taxpayers.
- Achieve 65 per cent self-generated revenue through business centres, the Elgin and Winter Garden Theatre Centre, Heritage Venues, museums and film, leases, grants, sponsorships, and donations.
- Continue work to review investment strategy and build capacity at the Trust with respect to oversight of the investments of the Trust.
- Develop and implement a robust strategy for corporate sponsorship, philanthropic foundations and individual giving; leverage the key role of the Board of Directors in supporting fundraising.
- Invest in business development opportunities at the EWG. This includes investment in new software and hardware to support an independent ticketing system. This investment would allow

EWG to manage its online and in-person box office on site for all ticketed events rather than using a third-party service provider. Diversified revenue generated through this step will modernize our practices and increase revenue, which will more than offset additional expenses. Having a staff member responsible for building the business, the EWG brand and maintaining our desired level of customer service will be a critical part of this business development and will allow the EWG greater control over patron information and communications.

- Showcase the EWG venues through unique, high-calibre programming and diversified offerings from varied user groups to attract audiences that reflect all Ontarians. Additionally, research energy and accessibility improvements for the EWG and conduct audits to review how best to update existing infrastructure to be more efficient and accessible, and to save money.

## OVERVIEW OF PROGRAMS AND ACTIVITIES

In delivering its legislated mandate, the Trust offers a range of heritage programs and activities, delivered in collaboration with public and private sector partners, designed to tell Ontario's stories, conserve provincially significant heritage sites and leverage the province's investment in supporting communities across the province.

The Trust's programs and activities include three pillars:

- 1. Conservation and stewardship**
- 2. Telling Ontario's stories: Commemoration and interpretation**
- 3. Business development and revenue generation**

This work supports the Trust's legislated mandate, directly supports Minister Ford's Letter of Direction, and integrates Ministry priorities in operational approaches.

The Trust collaborates with partners in urban, rural and remote communities throughout Ontario. The Trust conducts programs and activities that are accessible to approximately 85 per cent of Ontario municipalities and 99 per cent of the people in Ontario directly in their own communities. The Trust works to ensure that its programs are aligned with its strategic direction and mandate, and that programs are accessible, equitable and integrated, and that provide substantial value for money.

Trust programming effectively promotes diversity and inclusion, reconciliation and anti-racism initiatives. It also builds a sense of belonging in communities, boosts civic pride and volunteerism, contributes to local economies, supports tourism, delivers educational activities and develops engagement in and community capacity for celebrating and promoting heritage.

In 2024-25, Trust programs and activities will focus on continuing to provide key services in conservation, stewardship, commemoration and interpretation, delivering in-person events through museum programming, plaque unveilings, providing access to natural spaces and trail, and other in-person programs and events. Doors Open Ontario will showcase, among other things, places of faith and help to support diversity and inclusion in the Trust's work. The Trust will promote Black history in Ontario through the Josiah Henson Museum of African-Canadian History, continue to work with Indigenous and other racialized communities, and work across the province to tell their stories in their own voices by expanding the narrative and addressing outdated plaques. Significant focus will be given to expanding public access and reach through digital delivery and geomapping tools. The Trust, as a centre of excellence and as the province's heritage agency, will continue to conserve and commemorate key places with heritage significance that matter most to the people of Ontario.

### **Current focus**

In recent years, the Trust has reviewed its programs and properties to understand the diversity of its holdings better, to appreciate the portfolio's strengths, to identify any gaps in our work, and to support strategic planning for the Trust's work to conserve and commemorate Ontario's heritage.

The Trust is currently focused on expanding the narrative by ensuring that the heritage it protects and the stories it tells are a respectful, accurate and authentic portrayal of the peoples who have lived on, and contributed to building, the land we now embrace as Ontario. This narrative reflects over 10,000 years of human history.

The Trust strives to serve all Ontarians in all aspects of its work. This value is concretely reflected in the variety of activities it supports and the creativity with it approaches initiatives in business and community partnerships, storytelling, land protection, public and digital programming, and educational activities.

The Trust is collaborating with communities across the province to share their own stories in their own voices, to co-manage cultural and natural heritage sites, and to celebrate the diversity of experiences, languages, customs and perspectives of different people and places. This approach is embodied in the way the Trust forms policy, the way it listens and acts, and fundamentally how it respects others.

## **PILLAR #1**

### **CONSERVATION AND STEWARDSHIP**

#### **Legislated mandate to hold property**

The Trust is empowered through its legislated mandate to hold property of heritage value on behalf of the people of Ontario. Under the *Ontario Heritage Act, R.S.O. 1990*, the Trust is mandated to conserve properties of historical, architectural, archaeological, recreational, esthetic, natural and scenic interest for the benefit of the people of Ontario.

The Trust's portfolio of natural and cultural properties consists of 189 owned properties and 251 easement properties, including 165 registered archaeological sites. The Trust's conservation and stewardship activities aim to support communities across Ontario, contribute to the sustainability of heritage sites, reflect the diversity of places and people, and demonstrate best practices and excellence in conservation. The Trust's integrated approach to heritage conservation is designed to reflect the complex layering of history and the ways it is represented in our communities.

#### **Cultural heritage properties**

The Trust owns 24 cultural heritage properties. It also protects a further 197 cultural heritage properties through conservation easements. Many of these properties have archaeological sites or high potential for archaeological sites.

The Trust's property portfolio includes a diverse collection of provincially significant features, including rare vegetation communities, habitat for species at risk, unique examples of architectural styles and elements, and important archaeological sites that contribute to our understanding of the province's buried past, especially prior to European contact. The portfolio includes a wide range of artistic and educational sites including the Elgin and Winter Garden Theatre Centre, the Josiah Henson Museum of African-Canadian History, and the Doris McCarthy Artist-in-Residence Centre.

More than 90 per cent of the Trust's properties are managed with partners or leased. Operating models include business uses, adaptive reuse, commercial and residential leases, stewardship agreements with partner organizations, venues for film, conferences and meetings.

#### **Natural heritage properties**

The Ontario Heritage Trust's work helps to ensure that the Trust's natural environment — wetlands, woodlands, grasslands and geological land formations — remains a viable and significant part of our future.

The Trust owns 165 natural heritage properties and a further 54 natural heritage properties through conservation easements. These properties protect a variety of rare and sensitive environments, and

include wetlands, forested areas, cliffs, and a rare northern Ontario orchid habitat. Some of the Trust's natural heritage properties also contain provincially significant archaeological sites.

### **Partnerships**

Working with governments, Indigenous communities, conservation authorities, land trusts, heritage organizations and private landowners the Trust ensures responsible stewardship of its lands and easements, fosters vital community relationships and stimulates vibrant local participation. More than 90 per cent of the Trust's properties are managed with partners.

Trust ownership of these properties ensures the conservation of provincially significant cultural and natural heritage features, provides the public with access and educational opportunities, celebrates the province's diversity, and contributes to the economy.

### **Protecting heritage properties through conservation easements**

The Trust also protects properties it does not own through conservation easements. An easement is a legal agreement between the property owner and the Trust that is registered on the title of a property. It establishes mutually accepted conditions that will ensure the conservation of a heritage property in perpetuity without the Trust owning the property. The Trust holds conservation easements and natural heritage properties in 113 municipalities. An important part of protecting heritage on easement properties is collaborating with landowners to ensure that they understand how easements work and to provide guidance and ultimately approve or deny requests to make changes on the property, based on the assessed impacts to protected heritage elements. Working together proactively with landowners helps to build capacity and awareness of best practices for heritage conservation.

### **Strengthening community conservation**

The Trust is recognized for its expertise in conservation. In delivering its mandate, the Trust supports communities and community organizations by providing educational and technical advice on the conservation of Ontario's heritage, building local awareness and capacity for heritage planning, promoting adaptive reuse of heritage buildings to support increasing housing supply, and facilitating conservation solutions in communities across the province. The Trust adds value to its partnerships with property owners and communities, by finding innovative and cost-effective conservation solutions.

The Ontario Heritage Act Register is an important conservation and planning tool that strengthens opportunities for community conservation and supports informed decision-making in respect to planning and development. Available online, the OHA Register — among its many purposes — serves as a public database of all properties designated under the Ontario Heritage Act.

Other Trust conservation tools available online include the Places of Worship Inventory, the Plaque database and the Collections database of cultural and archaeological artifacts.

### **Ellis Property**

The Trust collaborates with its partners to enhance visitor experience and improve protection of natural heritage whenever possible. Currently, the Trust is leading a multi-year project known as the Twenty Valley Trail Restoration Project, working with a range of partners to make necessary trail improvements, install interpretive signs, enact important erosion control measures and undertake much-needed habitat restoration at the Ellis Property in the Village of Jordan. In 2024-25, the Trust will undertake Phase 1 of the Twenty Valley Trail Restoration Project, which will include necessary pre-construction archaeology, repair of the south entrance, erosion control of the slope along the river through the installation of a vegetated buttress, and re-establishing connections to the mail trail.



## **Managing impacts of changes to conservation authorities' partnerships**

Following changes to the *Conservation Authorities Act*, to the core mandate and financing mechanisms of conservation authorities (CAs), CAs are unable to continue operating Trust lands as they have in the past. Many CAs are renegotiating their stewardship agreements with the Trust, seeking compensation for work, and relinquishing responsibilities related to cultural heritage resources. The Trust is working to manage changes to its conservation authorities' partnerships.

In 2023, the Trust's operating partner, Credit Valley Conservation, notified the Trust that it would not continue to operate the Cheltenham Badlands. The Trust is now working to execute a new model for 2024-25 to operate the site directly using automated gates and an online reservation system. Once completed, this work is anticipated to generate revenue through park reservation fees for the Trust which can be reinvested into the property, to support additional site enhancements that are planned under a multi-year Master Plan. This site will open to the public in spring 2024.

## **PILLAR #2**

### **TELLING ONTARIO'S STORIES: COMMEMORATION AND INTERPRETATION**

#### **Strategic approach**

The Trust provides a coordinated and cohesive program of interpretation shaped through ongoing creative and strategic planning. This approach integrates programs, products and resources with branding and marketing and assists in securing funding support from grants and sponsors.

The Trust delivers its interpretive program to the public through a variety of tools including provincial plaques, exhibits and programming at museum sites, publications like *Heritage Matters* and *Heritage Matters ...more*, online exhibits and resources, Doors Open Ontario, Heritage Week programming, dialogues, presentations and workshops. The Trust integrates the perspectives of a wide range of partners and communities to ensure that a balanced, inclusive and objective narrative on Ontario's heritage is presented to the public.

#### **Program partners**

The Trust's public programming has province-wide reach. This work is done in partnership with others ensuring authenticity and integrity of the products. Trust programming is accessible, leverages the contribution of community partners, uplifts others and amplifies their voices.

The Trust engages with a wide array of partners across the province in the delivery of its programs and public activities. These partners currently include sponsors and corporate donors, Doors Open Ontario community organizations, plaque program partners, educational institutions, provincial and local heritage organizations, Doris McCarthy Artist-in-Residence partner organizations, Indigenous communities, and federal, provincial, and municipal governments. Since the pandemic and the resumption of in-person events, the Trust has engaged 20 to 25 Doors Open Ontario event partners annually.

In 2024-25, the Trust will hold targeted meetings with lapsed Doors Open communities (communities that have not participated in three or more years) to facilitate their return to the program with particular emphasis on rural/remote places like Chatham-Kent and Brockville. The Trust will also expand its influencer pilot to promote the program on its social media channels to target a younger and more diverse audience to attend in-person Doors Open event programming. In the 2024 season,

the Trust will also collaborate with Indigenous communities and build on existing partnerships to expand the Doors Open Program.

### **Expanding the narrative**

The Trust has developed policy, over the years, to ensure that its property portfolio and programming represent all aspects of Ontario's heritage. The Trust's Expanding the narrative initiative is designed to articulate:

- whose heritage is represented through the sites we own and protect;
- whose stories are told and by whom;
- whose values are recognized as relevant, and who is involved in those discussions.

The Trust collaborates with communities to help them share their stories, in their own voices, and to celebrate the diversity of their experiences, languages, customs and perspectives. This commitment is reflected in the Trust's policy-making process, the way it listens, and fundamentally, how it respects others through its actions.

The Expanding the narrative initiative focuses on re-imagining the Trust's commemorative and interpretive programming, delivered through such avenues as provincial plaques, Doors Open Ontario, educational programs, museum exhibits and digital programming.

### **Doors Open Ontario**

Doors Open Ontario is an annual, provincewide cultural heritage tourism program. The Trust launched Doors Open Ontario in 2002 to create access, awareness and excitement about the province's heritage. Doors Open Ontario events are held on weekends between April and October each year, providing an opportunity for people to access heritage sites in communities across the province, to boost tourism, to promote the importance of heritage, and to encourage people to take an active role in heritage conservation.

The program fosters strategic alliances with a range of community partners and attracts visitors to unique cultural tourism experiences that:

- Generate partnerships between arts, culture, and heritage organizations
- Create a positive sense of community and belonging
- Enrich a culture of heritage volunteerism
- Stimulate interest in local heritage, which translates into a tangible economic impact in participating communities by supporting small businesses.

Doors Open Ontario 2024 is expected to draw 20 to 25 in-person community events and represent each region of Ontario. If trends continue, visitation will exceed 300,000 site visits. The economic impact is estimated to be \$5.5 million, supporting COVID-19 recovery in vulnerable sectors as well as at least 20,000 volunteer hours. Doors Open Ontario will continue to offer online resources and experiences to ensure that the province's heritage is freely discoverable to anyone with an internet connection, regardless of other barriers to access.

For 2024-25 the Trust will ensure that Doors Open Ontario encourages further engagement and participation by faith-based organizations and other places of worship as a priority for 2024-25.

## **Provincial plaques**

With nearly 1,300 familiar blue and gold plaques displayed in communities across Ontario, the Provincial Plaque Program is the Trust's oldest and best-known activity. The plaques enliven Ontario's history, sharing stories of the people, places and events that have helped to shape the culture of the province. They enrich our sense of place and introduce newcomers and visitors to the unique character of regions, communities and Nations within the province.

Because the plaques reach back across more than 60 years of research and interpretation, and the Trust acknowledges that many of the plaques are exclusionary in their interpretation and include outdated terminology related to culture, race and gender. Our understanding of Ontario's heritage has expanded over the years through new research, revised terminology, and the sharing and valuing of additional perspectives. The text presented on several of the plaques needs to be revised to reflect new understandings emerging from the larger ongoing cultural conversations on various subjects raised on the plaques since they were originally inscribed.

In 2024-25, the Trust will be working with partners across the province to unveil plaques, including new plaques that tell untold stories and updated plaques that provide additional perspectives. Some examples of those plaques include:

- Montreal River Alternative Work Camp
- The Founding of Killarney
- Alderville Manual Labour School
- Mohawk Institute

## **Museum Sites**

The Trust owns and stewards several museums, historical sites, trail systems and natural areas in various communities across Ontario. Most of these properties are operated in partnership with local groups.

The Trust's museum sites promote several mandated goals, including education and community programming, conservation of the museum buildings, conservation of cultural and archaeological artifacts, visitor access, historical research and interpretation and commemoration. Some of the Trust's most popular sites are part of conservation areas, provincial and regional parks as well as major trail networks that draw visitors for ecotourism, recreation and wildlife viewing.

At the Josiah Henson Museum of African-Canadian History, in Dresden, the Trust interprets the history of racism and slavery in Ontario, and the struggle against these forces. The Trust has a strong commitment to Black history and anti-racism education. At the Josiah Henson Museum and through its programs, the Trust has worked to share some of the stories of Ontario's diverse heritage, significant individuals and settlements, although in some instances, no physical structures remain. We have explored these topics in museum exhibits, educational forums, provincial plaques, through our e-magazine *Heritage Matters*, the *Slavery to Freedom* web resource, events and social media. In 2024, a Youth Diversity Symposium will be held, bringing together students and educators to engage in conversations relating to inclusion and diversity. Through this event, students will learn to respect and recognize the background and experience of others and have the tools and confidence to engage in cross-cultural activities and dialogue. But there is much work yet to be done. There are heroes, inventors, creators, entrepreneurs and community leaders who have yet to be recognized and celebrated. Digital programming, with the ability to connect with youth and the public from anywhere in

the world will continue to be a source of growth and impact, which will also require additional resources to fully realize.

Fulford Place in Brockville is a magnificent Edwardian mansion overlooking the St Lawrence River. The museum tells the story of the Fulford family who influenced early 20<sup>th</sup>-century business and politics in Canada. Through its uniquely compelling collection of art and artifacts the museum gives visitors insight into the lives of the different members of the family who lived at the house and the service staff who cared for the household. In 2024, the museum will continue to expand the much-loved Music on the Veranda program and host open houses on holidays like Family Day and Canada Day. Staff are also working on a self-guided, digitally enhanced tour of the home to move visitors more efficiently through the house, while providing exceptional interpretation of the home's cultural collection and architectural details.

### **Lieutenant Governor's Ontario Heritage Awards (LGOHA)**

The Lieutenant Governor's Ontario Heritage Awards program, administered by the Trust, recognizes exceptional contributions to heritage conservation, environmental sustainability and biodiversity, as well as cultural and natural heritage. These juried awards, presented annually at a ceremony at Queen's Park in Toronto, are given for Youth Achievement, Lifetime Achievement, the Thomas Symons Award for Commitment to Conservation, Community Leadership and Excellence in Conservation. The program celebrates individuals and exceptional projects from communities across Ontario.

### **Doris McCarthy Artist-in-Residence Program**

The Trust operates the Doris McCarthy Artist-in-Residence Program at Fool's Paradise in Toronto — the former home and studio of Canadian artist Doris McCarthy. The program offers short-term residences to emerging visual artists, musicians and writers. Applications are reviewed by an expert advisory panel. Selected artists will live at Fool's Paradise while working in their creative disciplines. The program attracts nationally and internationally renowned artists and garners significant media coverage.

### **Heritage Week**

The Trust leads Heritage Week on behalf of the province. Heritage Week, the third week of February, is an annual opportunity to celebrate heritage in communities across Ontario.

### **Youth engagement, training and mentorship**

#### **Youth Strategy**

Supported by Canada Life, the Trust's Youth Strategy provides educational opportunities, mentoring forums, networking activities and points of connection that engage youth in communities across the province in heritage conservation.

#### **Mentoring/Teaching/University partnerships**

As part of our leadership role within the heritage sector, the Trust provides learning experiences and mentoring support for emerging professionals in various fields related to our mandate. The Trust partners with many universities and colleges on educational programming, including lecturing, credit-for-project courses, work placements and special research initiatives. Educational partnerships include:

- Algonquin College
- Fleming College

- Queen's Conservation Program
- Toronto Metropolitan University
- University of Toronto
- Willowbank School of Restoration Arts
- York University

These educational opportunities support community groups, members of the public, heritage organizations, professional associations and post-secondary educational institutions.

The Trust also actively supports the Ontario Internship and Internationally Trained Internship programs. We are committed to supporting youth employment through summer experience programs, internships and co-op placements.

### **Young Heritage Leaders (YHL)**

Since 2000, the Trust has collaborated with communities and schools to celebrate young volunteers' heritage activities. Recipients of these awards are announced during the annual LGOHA ceremony during Heritage Week. The Trust's Young Heritage Leaders program supports youth achievement in preserving, protecting, and promoting local heritage.

## ***PILLAR #3***

### ***BUSINESS DEVELOPMENT AND REVENUE GENERATION***

#### **Leases, rentals and license agreements**

The Trust has 35 lease agreements with businesses, not-for-profits and individuals in communities across Ontario. Through license agreements the Trust shares historical sites with local communities, allowing partners to participate in site care and interpretation. Additionally, the August 2021 agreement with Metrolinx provides coverage for the pre-existing lease at 265 Front Street East until 2033.

#### **Heritage Venues and filming**

In recent years, distinctive Toronto heritage venues have been promoted as unique, first-class facilities for meetings, weddings, corporate and special events. In addition to sharing these historical sites through adaptive reuse, revenues generated support the Trust's conservation and stewardship work. Furthermore, Trust sites — particularly those in or around the Toronto area (the Ontario Heritage Centre, the Elgin and Winter Garden Theatre Centre and Scotsdale Farm) — have successfully attracted filming activity.

#### **The Elgin and Winter Garden Theatre Centre (EWG)**

The EWG is a prime example of the Trust's mandate at work. The Centre's operations:

- Provide unique places of assembly and connection to complement the cultural infrastructure and serve the public interest in the heart of Ontario's capital city
- Deliver a variety of programs by leading entertainment practitioners from many disciplines across the province and around the world
- Offer an official provincial gathering place for the celebration of Ontario's artists, people, achievements and history
- Conserve, steward and interpret this unique national historical landmark, which is the last double-decker theatre operating in the world
- Demonstrate the continued modern-day use of the facility as it was originally designed and intended — as a home for live theatrical performances

The EWG hosts a broad range of live performances spanning theatre, dance, comedy, music and opera, as well as special events, concerts and festivals. The business model includes licensing of theatres, rehearsal studios and lobby spaces to provide unique places of assembly, inspiring creativity and innovation. The Trust also offers guided and group tours of the EWG, providing insight into its history and restoration.

In recent years, the Trust has been creating partnerships with private-sector producers to bring new productions to the EWG, resulting in exciting opportunities at both theatres for creative artists and audiences alike.

The EWG continues to focus on helping the live performance industry recover from the COVID pandemic by offering increased flexibility in venue booking to remove barriers and encourage diverse user groups. Additionally, the EWG expanded public access with new ventures, including a partnership with Haunted Walks Toronto, offering tours of our beautiful facility (and its many ghosts) to new audiences.

Redefining ticketing fees has allowed us to maintain revenue levels even while removing some ancillary fees and keeping license fees at pre-pandemic rates. These changes help producers and the client's budgets from an accuracy perspective, and keep their upfront costs more manageable, recognizing that the industry is still in recovery. Investment in a new ticketing system that can be managed in-house rather than through a third-party provider will expand our revenue opportunities as well as our ability to communicate directly with our patrons. It is expected to be in place by August 2024.

We are reviewing our concessions offerings with a focus on Ontario-made products. Introducing an Ontario-based craft beer company will allow us to streamline deliveries and increase profits as we will receive more preferred rates from these vendors. The installation of Wi-Fi on all levels of the cascading lobbies will allow clients to sell merchandise more efficiently and with greater flexibility. This will increase their profits and by extension, our percentage fees from these sales.

Completing an energy audit with the goal of removing fluorescent lighting and making other improvements will reduce the burden of our high annual utility costs in the longer term. Conducting an accessibility audit focusing on our backstage areas will help us determine the best steps to providing equitable access for artists and clients and become AODA compliant in all areas of the building.

The construction of the Metrolinx Ontario line along Queen Street in the downtown core is likely to cause operational disruption for the EWG to varying degrees over the next five to seven years. Transit, vehicle and pedestrian access will be restricted, and this may deter producers from choosing the EWG as the space for their event. The level of noise and vibration disruption is unknown at this time but will vary in intensity over the course of the project. Of particular concern will be matinee performances that would usually be scheduled during regular work hours. These impacts will be monitored and addressed through the OHT-Metrolinx Memorandum of Understanding.

### **Fundraising strategy**

The Trust raises philanthropic and sponsorship revenues through government grants, foundation grants, individual and major gifts, grants and corporate sponsorships as part of our annual giving program. Identification, cultivation, solicitation, stewardship and recognition are the cornerstone strategies employed to grow/build a loyal base of individual, corporate and organizational supporters.

## **Marketing and public awareness**

Building on the work done in 2023-24 on the Case for support, staff will procure a consultant to examine opportunities to bring greater awareness of the Trust as well as secure external funding to support its programs. We anticipate these opportunities will include:

- Naming rights opportunities, the timing and the value proposition for the Elgin and Winter Garden Theatre Centre
- Naming or sponsorship rights for programs and spaces such as lobbies and rehearsal studios at the Elgin and Winter Garden Theatre Centre
- Title sponsor for Doors Open Ontario
- Identification of key audiences and strategies for reaching them

## **Corporate sponsorships**

Staff will continue to prioritize multi-year corporate sponsorships by:

- Identifying corporate connections of our Board of Directors and the Senior Leadership Team
- Continue to tailor sponsorship proposals (Cases for support) for identified potential sponsors for the Trust's signature programs:
  - Doors Open Ontario
  - Emancipation Day/Diversity Symposia
  - Heritage Matters Live (TBD)
  - Careers in Heritage/Youth programs
  - Doris McCarthy Artist-in-Residence Program
  - Expanding the narrative
  - Black History Month programming
- Continue to steward existing corporate sponsors and develop new partnerships:
  - TD
  - Canada Life
  - RBC
  - Aird & Berlis
  - CI Global Asset Management
  - TD Private Wealth Management
  - Tenet Computer Group
- Continue to provide an exceptional level of benefit and stewardship

## **Stewardship**

Good stewardship is the cornerstone to repeat giving. Staff will ensure that we communicate our impact regularly through Constant Contact, social media and general awareness activities to build better and longer-term relationships. In addition, the Trust will:

- Identify/implement strategies for sponsor employee engagement in our programming
- Send invitations to special events, productions and screenings
- Explore a VIP event at a Trust site
- Provide regular Trust communications
- Establish a stewardship plan for each new sponsor

### **Performance measures**

- Secure \$255K in corporate sponsorships
- Submit four applications to new corporate sponsors

### **Foundations**

- Continue to identify Board of Directors foundation connections
- Develop program proposals tailored for specific foundations
- Deliver on reporting requirements
- Build on the pipeline in Grant Connect of existing, lapsed and potential foundation donors
- Identify local community foundation grant opportunities

### **Stewardship**

- Steward and grow current foundations
  - London Community Foundation
  - The William and Nona Heaslip Foundation
  - J.P. Bickell Foundation
  - Enoch Turner Schoolhouse Foundation
  - The Toronto Foundation
  - Greenbelt Foundation
  - RBC Foundation
  - Jackman Foundation
- Provide periodic updates on Trust initiatives and programming
- Invitations to special events, productions, and screenings
- Coordinate all agreement and reporting obligations
- Establish a stewardship plan for each new foundation

### **Performance measures**

- Secure \$50K in new foundation grants
- Submit four applications to new foundations

### **Grants**

- Apply to the Ministry of Citizenship and Multiculturalism (MCM) - Summer Employment Opportunities (SEO) Program for a minimum of five students
- Apply to Young Canada Works for funding students at Fulford/Homewood, the Josiah Henson Museum and the Ontario Heritage Centre. This employment program lasts between six and 16 weeks and supports organizations in Canada that have a heritage mandate.
- Apply for Capital Repair and Rehabilitation Program funding based on short- and long-term preservation, rehabilitation, restoration and operational needs of the Trust's provincially significant real property and non-property assets
- Apply to Parks Canada National Cost-Sharing Program for Heritage Places for \$250K
- Investigate Digital Museums Canada grant opportunities
- Research / explore additional new grant opportunities
- Steward the Canada Natural Infrastructure Fund application for \$1M for the Ellis Property project (depending on funding award)



### **Stewardship**

- Capital program report-backs to the Ministry of Tourism, Culture and Sport for Capital repair and rehabilitation funding
- Meet Ministry of Indigenous Affairs memorandum of understanding reporting requirements for \$35K annually
- Provide periodic updates on Trust initiatives and programming
- Coordinate all agreement and reporting/partnership/recognition obligations
- Establish a stewardship plan for each grantor

### **Performance measures**

- Funding for five SEO students from the Ministry of Citizenship and Multiculturalism (MCM)
- Funding for five Young Canada Works students
- \$4.0M in grants from other provincial sources
- \$281K in federal grants

### **Individual donors**

The primary challenge in attracting new individual donors is lack of public awareness of the Trust — who we are and what we do. This is also complicated by the breadth of the Trust's mandate and our government agency status. By using the Case for support, staff will develop a public marketing and communications awareness campaign for the Trust.

- Ensure that the website reflects the Case for support core fundraising information and highlights the circles of support
- Improve individual solicitations — both the timing and approach — to be more donor-centred and use a more consistent and relatable voice for the Trust's individual asks
- Develop a campaign for 2024 Giving Tuesday
- Continue to develop fundraising messaging for social media
- Build a major gift pipeline by identifying current, lapsed and prospective individual donors who may be capable of making a major gift
- Through renewal campaigns and direct work with the Board of Directors and Fundraising Committee, build the major gift pipeline: target the identification of up to 25 top prospects for personal cultivation and develop a solicitation strategy for a minimum of four major gift prospects from the Board's prospect list

### **Stewardship**

- Continue to solicit support from committee members and the Committee Chair in making personal calls to welcome new donors, thank existing donors and share the impact of their giving
- Use the Case for support to craft individual stewardship messaging (reports and impact reports)
- Continue to build the Trust's ability to acquire new donors by promoting donations at our sites, where appropriate, and build the Trust's Constant Contact distribution list
- Continue to look for opportunities and use Trust events to engage and steward individual and major gift donors with the Trust's programs and events

### **Performance measures**

- Reach 150 individual donors
- Achieve 100 per cent Board giving

- Achieve 100 per cent Senior Management giving
- Achieve \$50K in individual donations
- Achieve \$45K in major gifts of \$5K plus

### **Initiatives involving third parties**

The Trust maintains a wide range of relationships with tenants and operating partners, conservation authorities, municipalities, federal agencies, provincial ministries and agencies, Indigenous communities, land trusts, school boards, charitable foundations, universities and historical societies and other non-government organizations. While each body requires a slightly different approach, Trust staff collaborate closely with the parties in their portfolios to:

- Ensure that terms are clearly set out in contracts/leases/partnership agreements.
- Maintain strong and open channels of communication.
- Hold regular meetings to review and address issues.
- Audit sites regularly to ensure optimal stewardship and program implementation.

The Trust's partnerships include:

- 178 or about 90 per cent of natural and cultural sites managed with operating partners (including conservation authorities, naturalist organizations, land trusts, foundations, Ontario Parks, the Ministry of Natural Resources and Forestry, municipalities, Indigenous communities, friends' groups, ministries, educational institutions, and other non-government organizations)
- 251 conservation easement property owners, which include municipalities, public bodies, not-for-profit non-governmental organizations, private for-profit corporations, and individuals
- 228 municipalities with designated properties on the OHA Register

## PERFORMANCE MEASURES

Performance measures	2022-23 (Actuals)	2023-24 Targets	2024-25 Targets
<b>PILLAR #1 — Conservation and stewardship</b>			
Celebrating Ontario through total site/program participation	335,000	350,000	700,000
Total website visits	N/A	580,000	850,000
Social media fan base	28,000	29,400	34,000
Social media impressions	7.7M	4.25M	35M
Social media engagement	75,000	70,000	80,000
Youth mentoring hours (OIP, SEP, etc.+ unpaid)	7,000	7,000	7,500
Volunteers			2,800
Properties (cultural and natural) protected through ownership or easement — annually	483	483	440**
<b>PILLAR #2 — Telling Ontario's stories: Commemoration and interpretation</b>			
Ticketed attendance — Elgin and Winter Garden Theatre Centre — annually	90,000	75,000	150,000
Number of performances at EWG — annually	120	150	150
Number of artists who worked at the EWG — annually	n/a	500	650
EWG occupancy (days): studios, lobbies, event rentals and filming	420	450	500
<b>PILLAR #3 — Business development and revenue generation</b>			
Self-generated revenues* — annually	67%	65%	67%
Sponsorship/foundation/donor/capital/grant support (\$M)	\$2.6M	\$2.88M	\$4.8M

<b>Performance measures</b>	<b>2022-23 (Actuals)</b>	<b>2023-24 Targets</b>	<b>2024-25 Targets</b>
<b>Business centre revenue (\$M) EWG, Heritage Venues and museum sites</b>	<b>\$2.4M</b>	<b>\$3.1M</b>	<b>\$3.8M</b>
<b>Investment income (\$M)</b>		<b>\$0.74M</b>	<b>\$2.5M</b>
<b>Revenue from leased space — annually</b>	<b>\$1.09M</b>	<b>\$1.6M</b>	<b>\$1.7M</b>
<b>Economic impact of Doors Open Ontario — annually (<a href="http://www.mtr-treim.com/">http://www.mtr-treim.com/</a>)</b>	<b>\$6.1M</b>	<b>\$8.6M</b>	<b>\$8.4M</b>
<b>Economic Impact of the EWG — annually (<a href="http://www.mtr-treim.com/">http://www.mtr-treim.com/</a>)</b>	<b>\$2.0M</b>	<b>\$1.7M</b>	<b>\$3.4M</b>

\*The Trust's performance measures focus on the results of agency programs, services and general operations. Self-generated revenues include all grants secured through applications, sponsorships and donations from fundraising, business centres and investments.

\*\*Former property counting method counted parcels by acquisition, which were usually part of the same managed area and under the same property name. This counting method caused issues during reporting and working with partners. The new property counting method was determined to be more appropriate.

## **INVESTMENT IN CONSERVATION**

The Board of Directors approved the use of funds from the Investment in Conservation Fund (Partnership/Modernization) on December 14, 2022, for a group of priority projects. The following projects will use \$1,500,000 of funds from the Investment in Conservation Fund in this fiscal year:

Inge-Va — exterior repairs — \$200,000

Rockwood Academy — exterior repairs and HVAC upgrades — \$100,000

Eastern Ontario sites — preventative maintenance — \$100,000

Duff-Baby House — exterior conservation — \$400,000

Elgin and Winter Garden Theatre Centre — Yonge Street entrance repairs — \$400,000

Sir Harry Oakes Chateau — structural and building envelope repairs — \$300,000

We will also be completing \$975,000 of work that is a carryover from the \$1.95M previously approved for 2023-24 from projects, which includes work at Inge-Va, Moose Factory, Rockwood Academy, and several Eastern Ontario sites.

\$40K for GIS Phase 3, which will fully implement GIS mapping into OHT land management activities and make Trust data publicly accessible on the OHT website (HPC approval November 17, 2022).

\$200K updating and refreshing of Trust websites to promote critical program and business activities (HPC approval November 17, 2022).

\$175K to complete new research papers on 11 plaques prioritized for replacement. The funds will also be used for the casting, translation, and event production (\$270,000 approved for this work by HPC on March 4, 2022, of which \$175,000 will be spent in 2024-25).

\$25K for replacement of the plaque to the Mohawk Institute Residential School (approved by Finance and Investment Committee on June 8, 2022).

\$60K for the creation of Baseline Documentation Reports at 12 natural heritage properties to support the Strategic Conservation Plan priority (HPC approval March 4, 2022).

### **Strategic Conservation Plan**

Through extensive analysis of its property portfolio, the Trust has identified the strengths and weaknesses of its property holdings. In 2021, the Trust's Board of Directors directed staff to develop an acquisition plan to address strategic priorities approved by the Board. The framework was approved on September 22, 2021, and the plan was approved on March 23, 2022.

This plan demonstrates an ongoing commitment to investing in conservation. It will be implemented over sufficient time to allow the Trust to leverage new and existing partnerships to identify appropriate properties for acquisition or protection.

In 2024-25 the Trust will continue to implement the Strategic Conservation Plan by completing transfer of the following priority properties to the Trust:

- Phase I — \$792,000
  - Cahiaque Property, (Oro-Medonte) — transferring from Infrastructure Ontario (IO) to the Trust to support the protection of the provincially significant Indigenous archaeological site
  - Cummins Property (Thunder Bay) — transferring from IO to the Trust to support the protection of this provincially significant Indigenous archaeological site
- Phase 2 — \$350,000 - In 2024-25, the Trust will also be continuing to work with IO on the transfer of several additional priority properties, all with registered archaeological sites associated with the Huron-Wendat Nation
- Brent Property (Grey County) — transferring from IO to the Trust to support the protection of the Bruce Trail — \$50,000
- Vitali Property (Caledon) — transferring from IO to the Trust to support the protection of the Bruce Trail — Nil

## CAPITAL PLAN

The Trust will apply for funding to undertake the following projects:

### 1. Duff Baby House (Windsor) — restoration and repairs (\$450,000)

This project began in 2023-24 with \$450,000 in funding and is notionally approved for a further \$450,000 in 2024-25. The project undertakes exterior restoration and repairs to localized building envelope deficiencies including roofing, flashings, wood siding and window assemblies, and replace end-of-service-life heating, ventilation, and air conditioning equipment.

### 2. Elgin and Winter Garden Theatre Centre (Toronto) — exterior restoration and repairs (\$400,000)

To undertake the additional phase of repairs to the building envelope, which includes restoration of masonry walls on multiple elevations, the repair and recoating of siding on the south wall, the restoration of metal doors on the east wall stage door, and back-of-house accessibility.

### 3. Macdonell-Williamson House (Chute-à-Blondeau) — restoration and repairs (\$300,000)

To undertake necessary repairs to the building envelope and exterior elements including windows and doors, main entrance porch and accessible ramp, in addition to addressing roofing/envelope deficiencies to mitigate water ingress into the house.

### 4. McMartin House (Perth) — exterior restoration and repairs (\$400,000)

To replace the failed exterior concrete and steel accessible ramp.

### 5. Rockwood Academy (Rockwood) — adaptive reuse (\$400,000)

To support longer-term adaptive re-use through the stabilization and repair of the site's outbuildings (for example, the chapel, gazebo, shop and log cabins) and additional improvements that will provide for the transition from private residential use to potential new public uses and occupancies. This project is a business investment in the future use of the property.

**6. Scotsdale Farm (Halton Hills) — restoration and repairs (\$250,000)**

To undertake restoration and repairs to the agricultural outbuildings and barns, including road infrastructure improvements and care of cultural landscape features.

**7. Sheppard's Bush (Aurora) — restoration and repairs (\$300,000)**

To undertake projects to address building fabric and systems deficiencies. An architectural consultant will be initially engaged to perform an inspection and prepare a building conditions assessment report, identifying approaches for priority repairs and upgrades.

**8. Sir Harry Oakes Chateau (Kirkland Lake) — restoration and repairs (\$300,000)**

To undertake restoration and repairs of deficient building elements, including roofing replacement, structural repairs and elevator modernization to address current restrictions to on-site operations and museum programming. This is the second year of a three-year project and continues work begun in 2023-24 with \$280,000 in funding. This project supports important stakeholder and partnership relationships with the local community.

**9. Ontario Heritage Trust (multiple sites) — exterior painting and base building repairs (\$300,000)**

To undertake painting, building envelope repairs and other pro-active maintenance activities at multiple Trust built heritage sites to reduce the requirement for repeated major restoration projects.

**10. Ontario Heritage Trust (multiple sites) — fire-safety and security systems projects at Fulford Place (Brockville) and the Homewood Museum (Maitland) (\$400,000)**

To undertake the installation and replacement of a failing fire-safety system, including fire suppression and security upgrades, and interfacing restoration of affected building fabric caused by the work at Fulford Place and the Homewood Museum.

**11. Ontario Heritage Trust (multiple sites) — Accessibility for Ontarians with Disabilities Act (AODA) accessibility upgrades (\$100,000)**

To undertake AODA upgrades and improvements based on recommendations outlined in a previous AODA Accessibility Upgrade Report to implement accessibility improvements at key publicly accessible Trust sites/buildings in support of government-wide accessibility goals for 2025.

**12. Ontario Heritage Trust (multiple sites) — information technology renewal (\$400,000)**

To undertake the improved connectivity and Wi-Fi guest access at the Josiah Henson Museum of African-Canadian History, replacement of backup system and SQL licenses, MS Windows and SQL server licenses for three years, end-of-life replacement of financial system on the cloud, and full revamp of SharePoint.

## Capital Plan and two-year outlook

Property name/ Project name	2024-25 Budget	2025-26 Forecast	2026-27 Forecast
Ashbridge Estate — restoration and repairs	-	\$100,000	\$200,000
Bethune-Thompson House — restoration and repairs	-	\$250,000	-
Duff Baby House — restoration and repairs	<b>*\$450,000</b>	\$300,000	\$400,000
Elgin and Winter Garden Theatre Centre — exterior restoration and repairs	\$400,000	\$500,000	\$500,000
Fulford Place — restoration and infrastructure repairs	-	\$250,000	\$250,000
Homewood Museum — restoration and infrastructure repairs	-	\$250,000	\$500,000
Hudson's Bay Company Staff House and Centennial Park — exterior restoration and repairs	-	\$500,000	-
Inge-Va — exterior restoration and repairs	-	\$250,000	\$500,000
Macdonell-Williamson House — restoration and repairs	\$300,000	-	-
Mather-Walls House — infrastructure and repairs	-	-	\$250,000
McMartin House — exterior restoration and repairs	\$400,000	-	-
Ontario Heritage Centre — restoration and repairs	-	\$250,000	-
Rockwood Academy — adaptive reuse	\$400,000	\$250,000	\$250,000
Scotsdale Farm — restoration and repairs	\$250,000	\$250,000	\$250,000
Sheppard's Bush — restoration and repairs	\$300,000	-	\$300,000
Sir Harry Oakes Chateau — restoration and repairs	\$300,000	\$250,000	-
Ontario Heritage Trust (multiple sites) — exterior painting and base building system repairs	\$300,000	\$400,000	\$400,000
Ontario Heritage Trust (multiple sites) — fire-safety and security systems projects at Fulford Place and the Homewood Museum	\$400,000	-	-
Ontario Heritage Trust (multiple sites) — AODA accessibility upgrades	\$100,000	\$100,000	\$100,000
Ontario Heritage Trust (multiple sites) — information technology renewal	\$400,000	\$310,000	\$500,000
<b>TOTAL</b>	<b>\$4,000,000</b>	<b>\$4,210,000</b>	<b>\$4,400,000</b>

\* Project was notionally approved by MTCS in 2023-24 for funding in 2024-25.



## FINANCIAL ASSUMPTIONS

### Revenue:

MCM operating grant — The annual operating grant from the Ministry of Citizenship and Multiculturalism (MCM) is expected to remain at the 2023-24 level of \$3,809,300.

### Other provincial grants and project funding

- The annual contribution of \$20,000 for the Premiers' Gravesites Program is expected (as set out in the MOU for this program)
- The capital repair and rehabilitation funding allocation is estimated at \$4M.
- The Trust can support student employment at a level of 24 students per year from all programs. The budget is based on recent Ministry allocations of five summer students, equating to \$25K.
- Applications will be made to the Ontario Internship Program, the Black Alliance Internship Program and Indigenous Internship Program through MCM.
- The Trust fosters and develops various partnership opportunities with ministries and other agencies, including the Ministry of Indigenous Affairs for Nochemowenaing at \$35K (per MOU).

### Federal grants

- The Parks Canada National Cost-Sharing Program for Heritage Places contribution is estimated at \$250K.
- Young Canada Works is anticipated at \$31K.

### Sponsorship and fundraising

- The target is to raise \$429K from donations, corporate sponsorships, events and community partner contributions.
- Sponsorships from RBC for the Doris McCarthy Artist-in-Residence Program (\$60K) and RBC for Emancipation Day are in approvals for the year. Currently, sponsorship from Canada Life for the Youth Strategy (\$75K) is approved.

Doors Open Ontario sponsorship — Doors Open sponsorship for \$75K from TD is approved for the second year of a three-year commitment.

Business revenue — Includes revenue generated from the adaptive reuse for business purposes of selected heritage properties within the Trust's portfolio.

Lease rentals — Income from commercial, not-for-profit and residential leases are expected to drop this year due to increased vacancies. On average, commercial leases will increase 2-3 per cent and residential leases 2.5 per cent in 2024.

Heritage Venues and Filming — Revenue from renting heritage spaces for special events (including weddings) is expected to continue to return to pre-pandemic levels. Corporate meetings have not recovered to this point and are expected to continue to generate minimal revenue. Rentals for film locations and activities are projected to continue to be strong. Total revenue is projected at \$496K.

EWG Theatre Centre operations — Anticipated revenues of \$3.3M are expected. Investments are planned to result in increased revenues over the long term. These investments are projected in both the general fund and the restricted fund budgets.

### Investment income

Investment is estimated to generate \$2.51M. Investment returns are significantly impacted by the volatility of financial markets including escalating interest and uncertain equity and bond markets that will impact investment returns.

### Museum admissions and gift shops

Museums are open seasonally and will continue to provide access and education by supplementing in-person activities with online programming opportunities. It is anticipated that the museums will gradually see the return of international visitation to pre-pandemic levels. Group and bus tours are anticipated as the tourism industry continues to recover.

Currently, there is no effective model to monetize the Trust's online programming, and options are being investigated. No fees are budgeted currently for educational activities or online special events.

### Other income

Revenue is expected from the Ontario Heritage Act Register searches.

## **Expenditures:**

### Salary and benefits expenses

This includes the cost for 58 full-time equivalents (FTEs). An approximate annual increase of 2 per cent is built in during the planning horizon to address negotiated collective agreements for staff.

A recovery/off-set from selected project-specific restricted funding is applied each year representing the cost of staffing resources spent to deliver project-specific initiatives for which those funds were raised.

Retirement impact on employee future benefits is anticipated to increase significantly over the next five years.

## **Operating and program delivery expenses:**

### Business centre operations

This includes Heritage Venues and the EWG's direct operating expenses and heritage venue activities. These flow-through expenses are expected to increase 4 per cent and are recovered through receivables from the venue licensee.

### Property portfolio management

This includes expenses such as utilities, building systems maintenance and repairs, general property management, maintenance of infrastructure and visitor amenities and realty taxes required to upkeep and steward the Trust's portfolio of cultural and natural heritage properties. Increased public activity at Trust sites requires increased levels of upkeep and maintenance resulting in a 9 per cent increase in the budget.

In addition, costs of services and materials have increased significantly due to labour shortages, supply chain issues, transportation and fuel costs, and inflation.

### Program delivery

The budget amount is expected to increase in restricted fund spending for digitization projects,

marketing costs, expanding the narrative priorities, the Provincial Plaque Program and the Lieutenant Governor's Ontario Heritage Awards.

Doors Open Ontario expenses

The budget reflects a year-round digital program in addition to in-person events.

Capital restoration expenses

These expenses correspond with the level of capital funding allocated from external sources: the Ministry and carry over projects. These projects address priority conservation, health and safety and business needs.

Board-restricted investment in conservation (Fund 306)

The Board-restricted budget supports work to address development of new operating models and partnerships, older provincial plaques that include outdated language and terminology, and funds to offset base rent at the First Parliament Site until 2034. The impact of changes to the Conservation Authorities Act and associated regulations are not fully known and are projected based on current assumptions. The most efficient and cost-effective solution is to transition to fee-based arrangements with conservation authorities where possible. Where this is not possible, the Trust will have to manage properties directly. It is anticipated that \$4.48M will be spent in 2024-25, including recovery of staff time.

Externally restricted investment in conservation (Fund 616)

The externally restricted budget supports work to address continued implementation of the Strategic Acquisition Plan, and work to support the commitment related to commemorating Residential School burial areas. It is anticipated that \$1.4M will be spent in 2024-25, including recovery of staff time.

**Operating surplus/ (deficit):**

The Trust's core operation is forecasted to result in a surplus of approximately \$140K in the general fund and a combined deficit of \$6M including restricted funds.

# BUDGET AND TWO-YEAR FINANCIAL OUTLOOK

ONTARIO HERITAGE TRUST	2022-23	2023-24			2024-25			2025-26	2026-27
OPERATING FINANCIALS	ACTUAL AUDITED	BUDGET			FORECAST			FORECAST	FORECAST
	TOTAL COMBINED	GENERAL FUND	RESTRICTED FUNDS	TOTAL COMBINED	GENERAL FUND	RESTRICTED FUNDS	TOTAL COMBINED	TOTAL COMBINED	TOTAL COMBINED
<b>REVENUE</b>									
OPERATING GRANT	3,829,300	3,809,300	20,000	3,829,300	3,809,300	20,000	3,829,300	3,829,300	3,829,300
- MCM Operating Grant		3,809,300			3,809,300				
- MCM Premiers' Gravesite Program (annual maintenance)			20,000			20,000			
PROPERTY TRANSFER - METROLINX	39,000			0					
OTHER MINISTRY GRANTS					20,000	4,000,000	4,020,000	4,235,000	4,427,500
- MTCS Capital investment	1,783,558		2,020,000	2,020,000		4,000,000			
- MCM SEP; Summer student funding	14,756	19,000		19,000	20,000				
PROVINCIAL GRANTS	185,000	0	30,000	30,000	0	35,000	35,000	35,000	35,000
FEDERAL GRANTS	30,621	14,000	350,000	364,000	0	281,000	281,000	31,000	281,000
NON GOVERNMENT	30,000	0	0	0					
FUNDRAISING, SPONSORSHIPS & PARTNER FUNDING	289,548	85,000	335,000	420,000	165,000	314,000	479,000	485,500	498,125
DOORS OPEN ONTARIO SPONSORSHIP (including registration fee)	84,000	0	127,000	127,000	0	122,000	122,000	123,000	124,000
BUSINESS CENTRE'S INCOME	3,082,105	4,665,900	0	4,665,900	4,383,000	0	4,383,000	4,560,530	4,688,787
INVESTMENT INCOME	2,925,000	105,000	630,000	735,000	900,000	1,600,000	2,500,000	2,295,000	2,108,250
MUSEUM ADMISSIONS & GIFT SHOP	64,251	62,547		62,547	65,000		65,000	66,000	67,000
OTHER INCOME	13,075	13,266		13,266	13,000		13,000	13,000	13,000
<b>TOTAL REVENUE</b>	<b>12,370,214</b>	<b>8,774,013</b>	<b>3,512,000</b>	<b>12,286,013</b>	<b>9,355,300</b>	<b>6,372,000</b>	<b>15,727,300</b>	<b>15,673,330</b>	<b>16,071,962</b>
<b>EXPENDITURES</b>									
SALARIES & BENEFITS	5,629,000	7,279,917	1,140,084	8,420,001	7,303,196	333,343	7,636,539	7,778,870	7,673,870
OPERATING & PROGRAM DELIVERY EXPENSES	4,366,346	3,534,034	1,035,000	4,569,034	3,645,124	1,585,000	5,230,124	4,610,362	4,743,569
DOORS OPEN ONTARIO	358,350		200,000	200,000		143,100	143,100	143,100	143,100
CAPITAL RESTORATION & RENEWAL EXPENSES	2,463,553		2,000,000	2,000,000		4,000,000	4,000,000	4,210,000	4,400,000
RESTORATION EXPENSES - From non Ministry Allocation (Parks Canada)	49,466		350,000	350,000		500,000	500,000	250,000	500,000
RESTRICTED FUND EXPENSES	61,036		0	0			0	0	0
FUND 306 BOARD INVESTMENT IN CONSERVATION	225,592		1,923,500	1,923,500	-1,506,431	4,481,431	2,975,000	2,500,000	2,575,000
FUND 616 EXTERNAL INVESTMENT IN CONSERVATION	0		985,000	985,000	-226,886	1,418,886	1,192,000	1,250,000	1,486,000
<b>TOTAL EXPENDITURES</b>	<b>13,153,343</b>	<b>10,813,951</b>	<b>7,633,584</b>	<b>18,447,535</b>	<b>9,215,003</b>	<b>12,461,760</b>	<b>21,676,763</b>	<b>20,742,332</b>	<b>21,521,539</b>
<b>Operating Surplus/(Deficit):</b>	<b>-783,129</b>	<b>-2,039,938</b>	<b>-4,121,584</b>	<b>-6,161,522</b>	<b>140,297</b>	<b>-6,089,760</b>	<b>-5,949,463</b>	<b>-5,069,002</b>	<b>-5,449,577</b>

**Notes:**

The General Fund includes all of the ordinary day-to-day transactions of the Trust. The Trust may disburse, expend or otherwise deal with any part of its General Fund for the purpose of any of the objects of the Trust, and to defray any expenses incurred in carrying out its objectives.

Restricted Funds consist of Externally Restricted Funds received from the Province of Ontario [the "Province"], the federal government and non-profit organizations to finance specific projects, or contributions received from individuals and corporations with restrictions on use in accordance with the terms as specified by the contributors. Additionally Internally Restricted Funds consisting of amounts set aside by the Board of Directors to finance specific projects within the mandate of the Trust. Restricted funds are recognized as revenue in the year of receipt and are used in accordance with restrictions specified by the contributors or the OHT Board of Directors. Use of restricted funds (expenditures) will commonly happen in years subsequent to receipt and result in restricted fund deficits. The general fund is forecasted to have a balanced budget in each of the forecasted years.

## HUMAN RESOURCES (HR) AND STAFFING

### Staff representation (as of December 2023)

Senior Management Group	Union			Total
	AMAPCEO	OPSEU	MCP/Excluded	
4	12	31	11	58

### Staffing report

Staffing	As of December 2023
Number of regular staff	50
Number of fixed-term staff	3
Number of part-time staff	0
Staffing in process	5
<b>Total Staff Strength</b>	<b>58</b>

The Trust regularly reviews its organizational structure — 58 full-time equivalent (FTE) positions — to ensure that operational programming and staffing needs are aligned for the achievement and delivery of organizational goals.

The Trust's HR plan delivers on the following goals:

- Works in compliance with OPS directives and policies on human resources and labour relations practices to ensure that the Ontario Heritage Trust (OHT) is optimizing its organizational capacity to support the best possible public service delivery.
- Ensures the expertise and experience required to meet its broad mandate and legislated responsibilities as set out in the *Ontario Heritage Act*, and the skills and knowledge to deliver the Business Plan.
- Identifies appropriate skills, knowledge and experience needed to effectively support the Board's role in agency governance and accountability.
- Works within the OPS Multi-Year Accessibility Plan and the MCM Anti-Racism Action Plan to develop and encourage diversity and inclusion initiatives by promoting an equitable, inclusive, accessible, anti-racist and diverse workplace.

The freeze on non-essential frontline services recruitment remains in effect. Exemption requests for permanent and/or external hiring are submitted to the Deputy Minister (DM), as per the Ministry's Human Resources Delegation of Authority.

Upon receiving approvals, the Trust's staffing needs will continue to be addressed through recruitment activities (that is, internal and external competitions) to build capacity and fill business-critical positions — permanently and temporarily — in branches within the agency. Trust staff require highly specialized skill sets in areas such as archaeology, cultural heritage, natural heritage, and easement properties.

External recruitment will allow the Trust to recruit talent with the necessary subject matter expertise required to conserve and preserve Ontario's heritage. This includes diversifying the candidate pool in under-represented groups, including Indigenous, Black and racialized individuals, Francophone, persons with disabilities, and 2SLGBTQIA+.

This strategy is consistent with general OPS-wide commitments designed to help employees “grow, perform and succeed” and connect with specific priorities articulated by the Ministry of Citizenship and Multiculturalism (MCM) to:

- Promote equitable economic growth and opportunity for all Ontarians
- Lead the government’s anti-racism and anti-hate initiatives
- Foster inclusive, vibrant communities of today while conserving and preserving Ontario’s heritage

## **MARKETING AND COMMUNICATIONS STRATEGY**

### **Priorities**

The Trust’s Marketing and Communications strategy will build on record web visitation achieved in 2023-24 by continuing to enrich and develop our audience in 2024-25. The first priorities will include developing new creative photo and video assets for the Trust’s organic and paid campaigns to develop stronger brand awareness, a larger social media audience and achieve higher participant engagement for our programs, events and museum sites. The second priority will be delivering the web refresh project of the corporate website to ensure that the site can be as engaging as possible and remain a centre for information about Ontario’s heritage to the public. This work will support the delivery of key Trust goals.

The creative refresh will include the development and rollout of substantial new photo and video content (the Trust will collaborate with an external vendor to capture and create). It will be used to promote Doors Open Ontario in particular, with the goal of replacing static images of heritage sites with images and video assets of people actively experiencing those locations. Past insights from the Trust’s paid media and public relations vendors have identified a need for this kind of creative refresh to make our campaigns more successful. Furthermore, the user-experience audit for the Trust’s corporate website, scheduled to be completed in December 2023, will inform the results of the web refresh of the Trust’s corporate website (which will take place in 2024-25). Principles for the web refresh will be determined at the conclusion of the audit process.

To build the Trust’s diverse audience, brand and reach, the marketing and communications plan will deliver on multi-platform, integrated tactics needed for each announcement, strengthening our overall ability to share Ontario’s heritage stories while ensuring that our messaging maintains the Trust’s reputation as a leader in the heritage sector.

### **Expand digital marketing**

The Trust increased its focus on digital marketing and program delivery during COVID-19 through earned and paid social media, targeted e-blasts and online advertising that directed visitors to our Doors Open Ontario and corporate websites. This dramatic shift to digital promotional tactics set the Trust websites up for success as trustworthy, factual sources of information about our programs and Ontario’s heritage. The Trust needs to continue to deploy ongoing digital marketing strategies to effectively reach new and diverse audiences in the years to come, both for digital and in-person programming.

Rollout of this strategic approach will continue in 2024-25 as digital marketing offers the most effective tools and methods to track statistics on web traffic and facilitate efforts to measure the effectiveness of the Trust’s message. Using insights gleaned from digital marketing, the Trust will

continue to hone advertising and communications strategies and tactics to engage new audiences, understand their needs and produce the variety and quality of content to which they optimally respond. The Trust is committed to providing audiences with enriching experiences in every interaction.

### **Grow social media**

The Trust has experienced steady growth and strong engagement across its social media channels. The Trust will continue to maintain a presence on Facebook, X (formerly Twitter), Instagram, YouTube and LinkedIn. These tools have proven to be useful in circulating information, engaging with existing supporters and growing a loyal following. In 2024-25, the Trust will focus on delivering unified, engaging content that is tailored to the nuances of each social media channel.

Content will consist of a mix of organic posts, paid posts and cross-posting with partner organizations to expand the reach and impact of our messages while continuing to grow our following.

### **Strengthen brand awareness**

Strong brand awareness increases recognition of the organization among potential supporters and creates loyalty among existing supporters, laying the groundwork for a conversion from general awareness to support (including fundraising) and participation.

The Trust will continue to strengthen its brand across all communications in 2024-25, establishing a recognizable link between the Trust's programs, events and venues, including the annual interpretive theme, Doors Open Ontario, Trust-owned and -operated museums, advertising, fundraising initiatives and day-to-day communications.

### **Tell Ontario's heritage stories**

To strengthen our impact and reputation as a leader in the heritage sector and to facilitate Ontario's inclusive heritage storytelling, the Trust will continue to collect, create and curate educational and engaging content that shares interesting facets of heritage with our target audiences.

The Trust engages in a wide variety of activities year-round that appeal to numerous audiences. To speak directly to these audiences, the Marketing and Communications team will engage with the Trust's program areas to develop content that:

- Highlights our annual interpretive priorities
- Promotes in-person events, including Doors Open Ontario
- Shares new and interesting perspectives on the work we do
- Positions the Trust as a leader in the heritage sector
- Showcases best-practice models of adaptive reuse of heritage buildings and older building stock
- Builds credibility and authority for the Trust
- Builds brand awareness for the Trust
- Shares the province's diverse stories
- Develops loyalty to the organization among our supporters
- Presents opportunities for the Ontario public to make donations in support of the Trust's work
- Highlights sponsors and corporate sponsors that contribute
- Continues to grow our social media following

By collaborating with experts within the Trust and beyond, our content will provide a serious and informed perspective that will help to deliver the Trust’s mandate and drive conversations within the heritage sector while entertaining/educating our audiences.



## RISK CHART

Provincial agency: Ontario Heritage Trust				
Key information	Risk description	Risk management plan	Status of management plan	Risk rating/score
<b>Risk title</b> Potential for disruption of operations at the Elgin and Winter Garden Theatre Centre (EWG) due to Metrolinx Ontario Line construction	The risk that disruptions from nearby construction of Metrolinx's Ontario Line will negatively impact programming and revenue at OHT's Elgin and Winter Garden Theatre Centre.  Potential disruptions include periodic outages of utilities and other essential services such as internet access, and reduced access to streets and neighbourhood parking lots for patrons.	EWG is mitigating risks as they arise, while carrying on "business-as-usual."  Have engaged with Metrolinx to identify potential risks to the EWG and possible remedies.	OHT and MCM's DMO have engaged with Metrolinx on a process to identify risks and potential remedies. Staff have negotiated an MOU with Metrolinx regarding the Ontario Line that addresses the potential for structural damage or damage to the business or business reputation of the Elgin and Winter Garden Theatre Centre.  An OHT-Metrolinx agreement was signed in Q3, 2023-24. Awaiting finalization.	<b>Residual impact</b>  <b>5 - Critical</b>
<b>Category</b>  Operational-Financial				<b>Residual likelihood</b>  <b>5 – Almost certain</b>
<b>Age of risk</b> Q1/2021-22				<b>Residual Risk (Total Risk Rating/Score)</b>  <b>25 – High</b>
<b>Timeframe to manage down</b> Ongoing	Disruption risks expected to last many years.			
<b>Speed of onset</b> Immediate upon start of construction				

Provincial agency: Ontario Heritage Trust				
Key information	Risk description	Risk management plan	Status of management plan	Risk rating/score
<b>Risk title</b> Challenges in reopening the Cheltenham Badlands site due to changes to the <i>Conservation Authority Act</i> (CA Act), impacting the stewardship and operation of this heritage property	The Trust partners with conservation authorities (CAs) to operate many of its natural heritage properties. Due to changes to the <i>Conservation Authority Act</i> (CA Act) related to the core mandate and financing mechanisms of CAs, in November 2023, the Trust's operating partner notified the Trust that it was ending its partnership because of changes to the CA Act.	Of urgency for 2024-25, is the need to reopen the Cheltenham Badlands in April 2024.  The OHT is proposing fee-based agreements with CAs for them to provide property management services, and/or directly managing sites through reallocating OHT staff and resources.	The OHT has developed a plan to implement an alternate operating model at Cheltenham Badlands. The site is planned to reopen in spring 2024 and operate throughout the season using an automated entry system.	<b>Residual impact</b>  <b>4 – Major</b>
<b>Category</b>  Operational-Legal	The OHT continues to deal with the impact of these legislative changes on the Trust's agreements with CAs.	Re-allocate funding through program reductions. Re-allocate human resources through reprioritization to meet new requirements.		<b>Residual likelihood</b>  <b>5 – Almost certain</b>
<b>Age of risk</b> Q3/2022-23  <b>Timeframe to manage down</b> Ongoing  <b>Speed of onset</b> Immediate upon changes to the <i>Conservation Authorities Act</i>	The Trust has no core funding to operate these sites and continues to face the risks of having to close natural spaces and trails to the public, having unmonitored trail systems and the potential risk to public safety caused by hazard trees, and a significant increase in costs to the Trust to meet long-term conservation goals.	The OHT is collaborating with partners to stabilize partnerships through strategic investments in conservation and in the operations of sites.		<b>Residual risk (total risk rating/score)</b>  <b>20 – High</b>

**Provincial agency: Ontario Heritage Trust**

<b>Key information</b>	<b>Risk description</b>	<b>Risk management plan</b>	<b>Status of management plan</b>	<b>Risk rating/score</b>
<p><b>Risk title</b></p> <p>Challenges in attracting and retaining the best-qualified staff within the heritage marketplace.</p>	<p>A potential OPS hiring freeze will impact the OHT's ability to hire external staff with skills to deliver our mandate and fill positions on a permanent basis.</p>	<p>Seeking internal candidates with the best skills and providing additional job-specific training and mentoring. Seeking external candidates (when appropriate) with approvals.</p>	<p>Seeking approval to fill vacancies with external candidates (when appropriate) and in a timely manner. Seeking external candidates will continue to support the OPS diversity and inclusion plan.</p>	<p><b>Residual impact</b></p> <p><b>2 – Moderate</b></p>
<p><b>Category</b></p> <p>Operational-Human Resources</p>	<p>Financial stability and the delivery of high-quality conservation, interpretation and theatre programming will be impacted.</p>	<p>Working in partnership with OPS HR advisory services to attract quality talent, use the right assessment tools, and selection of the candidate who is the best fit to make a positive impact.</p>	<p>Ensuring early engagement and collaboration with OSS HR to determine the best forums for job advertisements and assessment tools.</p>	<p><b>Residual likelihood</b></p> <p><b>4 – Likely</b></p>
<p><b>Age of risk</b> Q1/2018-19</p> <p><b>Timeframe to manage down</b> Ongoing</p> <p><b>Speed of onset</b> Consistent</p>	<p>The skillsets required for business operations and conservation are not normally found within the OPS.</p> <p>Due to bargaining units, salary limits, fixed headcounts (FTEs) and OPS hiring restraints, the Trust is challenged to sustain an organization that is structured to attract/retain the best-qualified staff within an ever-changing heritage environment.</p>	<p>Using the OPS Recruitment Inclusion Lens for all recruitments helps to ensure an inclusive process by identifying potential barriers and building our own awareness of diversity, accessibility, and inclusion. Considering inclusion throughout the recruitment process will help ensure that we can attract, recruit, and retain the best talent.</p>	<p>Sourcing strategy also includes methods to attract qualified applicants from diverse communities. Interview panels consist of a diversity of viewpoints and backgrounds. A variety of assessment methods are used to provide insight into candidate strengths and weaknesses.</p>	<p><b>Residual risk (total risk rating/score)</b></p> <p><b>8 – Medium</b></p>

Provincial agency: Ontario Heritage Trust				
Key information	Risk description	Risk management plan	Status of management plan	Risk rating/score
<b>Risk title</b> Litigation by the Trust	Risk to reputation and being unsuccessful in resolving a significant encroachment at Nochemowenaing (Lot 21).  The lands are culturally and ecologically sensitive and are sacred to the Anishinabek people. They are co-managed with the Chippewas of Nawash Unceded First Nation.	The OHT is working with the Legal Branch and Crown Law in pursuing the removal of encroachments.	OHT continues to work with the Nawash, Legal Services, and the Ministry of the Attorney General's Crown Law Office to secure the removal of the encroachments from Lot 21.  The hearing, originally set for August 25, 2022, has been rescheduled several times. It is currently scheduled for March 10-11, 2025.	<b>Residual impact</b>  <b>3 – Moderate</b>
<b>Category</b> Operational-Legal				<b>Residual likelihood</b>  <b>4 – Likely</b>
<b>Age of risk</b> Q1/2021-22  <b>Timeframe to manage down</b> Ongoing  <b>Speed of onset</b> Consistent				<b>Residual risk (total risk rating/score)</b>  <b>12 – Medium-High</b>

Provincial agency: Ontario Heritage Trust				
Key information	Risk description	Risk management plan	Status of management plan	Risk rating/score
<b>Risk title</b> Cyber Security Attack	Potential for a cyber attacker to seek financial gain through money theft, data theft, or business disruption through a cyber-attack. A data breach would impact the financial system and it could lead to a diminishment of reputation.	Cyber security controls have been added and ongoing monitoring continues.	Ongoing security patches added on a regular basis. In addition, also includes upgrading firewall and site to site tunnels to stronger encryption, migration to Office 365 Business Premium with Cloud Defender, implementation of MS Defender for servers with custom rules, Microsoft Intune custom policies for all mobile devices, public-facing web site security enhancements, and Azure AD identity protection is implemented.  Provide advice, guidance, information to staff to raise cyber awareness and provide tools to become better educated on cyber security issues.  Staff continue to work with the division to receive timely notifications of current threats.	<b>Residual impact</b>  <b>4 – Major</b>
<b>Category</b> Operational-I&IT		External cyber audit of systems completed and recommendations for reducing risks and allowing for informed decisions are underway.		<b>Residual likelihood</b>  <b>4 – Likely</b>
<b>Age of risk</b> Q1/2019-20  <b>Timeframe to manage down</b> Ongoing  <b>Speed of Onset</b> Consistent		Increase staff awareness of phishing and cyber security issues.		<b>Residual risk (total risk rating/score)</b>  <b>16 – Medium-High</b>

Provincial agency: Ontario Heritage Trust				
Key information	Risk description	Risk management plan	Status of management plan	Risk rating/score
<b>Risk title</b> Reduction of theatre programming (post-COVID and during an economic slowdown)	There is a risk that OHT business operations will be impacted due to a continued low tolerance for risk in the theatre sector. This will result in fewer new productions in development and less risk-taking related to the opening of new productions.	Strategically support production companies with the potential to build new shows with cost-effective workshops, rehearsals, and office spaces.	Actively working with the performing arts community to support them through the post-COVID period.	<b>Residual impact</b>  <b>4 – Major</b>
<b>Category</b>  Operational-Financial			Working with potential clients and offering responsive licensing terms, including more flexible financial timelines and venue booking options.	<b>Residual likelihood</b>  <b>3 – Possibly</b>
<b>Age of risk</b> Q3/2019-20  <b>Timeframe to manage down</b> Ongoing  <b>Speed of onset</b> Consistent			In consultation with clients, enforce guidelines to increase patrons' comfort with the return to in-person events.	<b>Residual risk (total risk rating/score)</b>  <b>12 – Medium-High</b>

Provincial agency: Ontario Heritage Trust				
Key information	Risk description	Risk management plan	Status of management plan	Risk rating/score
<b>Risk title</b> The OHT is unable to deliver on its stewardship role to protect and conserve its physical assets.	The OHT is provincial agency with a high percentage of variable revenues in its annual budget. If revenues fail to meet budgeted levels, capital repair and replacement would have to be deferred if other funding sources are not available.	Work closely with long-term OHT partners to understand their challenges while also looking at the development of potential solutions.  A continuing, dedicated focus on revenues and expenses within the Trust's annual budget.	Active	<b>Residual impact</b>  <b>4 – Major</b>
<b>Category</b> Operational-Program Design/Delivery	Coming out of COVID, long-term partners are struggling to meet their commitments related to capital work on OHT sites. Over an extended period, this could result in the OHT's failure to maintain assets to adequate standards, as well as lost business opportunities.			<b>Residual likelihood</b>  <b>5 – Almost certain</b>
<b>Age of risk</b> Q3/2019-20  <b>Timeframe to manage down</b> Ongoing  <b>Speed of onset</b> Consistent				<b>Residual risk (total risk rating/score)</b>  <b>20 – High</b>

<b>Provincial agency: Ontario Heritage Trust</b>				
<b>Key information</b>	<b>Risk description</b>	<b>Risk management plan</b>	<b>Status of management plan</b>	<b>Risk rating/score</b>
<b>Risk title</b> The Town of Kirkland Lake will seek to renegotiate its operating agreement for Sir Harry Oakes Chateau to transfer capital cost responsibilities back to the OHT.	The OHT is a self-funding agency with a high percentage of variable revenues in its annual budget. The potential transfer of capital cost responsibilities back to the OHT will directly impact our available budget for other programs and sites.  Long-term partners continue to struggle to meet their commitments related to capital work on OHT sites. There is almost certainty that this would result in the OHT's failure to maintain assets for Sir Harry Oakes Chateau to adequate standards, as well as lost business opportunities.	Work closely with the Town of Kirkland Lake to arrive at an agreement that does not transfer capital cost responsibilities back to the OHT.	Active	<b>Residual impact</b>  <b>4 – Major</b>
<b>Category</b> Operational-Financial				<b>Residual likelihood</b>  <b>5 – Almost certain</b>
<b>Age of risk</b> Q4/2023-24  <b>Timeframe to manage down</b> Ongoing  <b>Speed of onset</b> Consistent				<b>Residual risk (total risk rating/score)</b>  <b>20 – High</b>