



An agency of the Government of Ontario

Business Plan

2026 - 27

FINAL

heritagetrust.on.ca

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1. EXECUTIVE SUMMARY

The Ontario Heritage Trust, per the Ontario Heritage Act R.S.O. 1990, c.O.18, s.7; 2005, c. 6, ss.1, 5, is mandated to:

- a) advise and make recommendations to the Minister on any matter relating to the conservation, protection and preservation of the heritage of Ontario
- b) receive, acquire and hold property in trust for the people of Ontario
- c) support, encourage and facilitate the conservation, protection and preservation of the heritage of Ontario
- d) preserve, maintain, reconstruct, restore and manage properties of historical, architectural, archaeological, recreational, esthetic, natural and scenic interest
- e) conduct research, educational and communications programs necessary for heritage conservation, protection and preservation.

In 2025, the Board of Directors approved an ambitious strategic plan that focused on leveraging Ontario Heritage Trust (Trust) assets to engage the people of Ontario in meaningful heritage experiences that help them to see themselves as part of the story of Ontario to date, and as contributors to Ontario's story in the future.

The Strategic Plan re-centres the Trust's property portfolio as not only a key responsibility, but also as a core asset of the organization, as it seeks to meet its mandate. The plan also recognizes the importance of relationships with the people of Ontario as clients, audiences, stakeholders, contributors and partners. It emphasizes building reciprocity and relevance.

The 2026-27 Business Plan seeks to operationalize that strategic plan, rooted in the Trust's legislated mandate, while fulfilling the objectives set out in the Letter of Direction from the Minister of Citizenship and Multiculturalism (the "Ministry" and/or MCM).

This year, the Trust will focus on the provincial government theme of **Protect Ontario** by using its resources judiciously, mindfully sourcing from Ontario companies, wherever possible, and supporting heritage tourism. We also recognize, however, the power and the role of heritage in creating a sense of unity. As all Ontarians see themselves in the story of the building of Ontario, they also see themselves in the Ontario of today, and the future we are building together. Bringing Ontarians together with a sense of unity and belonging, with a sense of pride and togetherness, will give us a competitive advantage and help us to sustain momentum in protecting Ontario. Working together will help move us forward. Protecting is in our mandate. We know that protecting and celebrating our heritage also helps us to protect our identity as Ontarians.

We are working toward building a strong, resilient and sustainable Trust. To build a strong organization, we need relevant data and rigorous systems that can respond to changing needs, as well as robust sources of revenue and strong business relationships that will fund the important work of the Trust. We will aim to improve our services by making them more efficient, accessible and targeted to the needs of our clients and audiences. This includes gathering data for baseline measures, conducting audience surveys to understand satisfaction and usage patterns, embracing modern technologies to reach broader audiences, and creating efficient systems to ensure that services meet audience needs while also guaranteeing that staff resources are used effectively.

Our greatest assets are our collection of properties, heritage objects and plaques, which we will leverage and explore to make heritage useful, relevant and sustainable — strengthening the Trust and strengthening Ontario.

To set the Ontario Heritage Trust up for long-term success, this year’s business plan will focus on **data-gathering**, program and process **evaluation, planning** and program design, **capacity building** (including policy and infrastructure development) and targeted **outreach** efforts to tackle persistent systemic challenges and to mitigate emerging issues. This, combined with the **ongoing delivery of key programs**, will ensure that the Trust remains a **relevant, sustainable** and **effective** agency, delivering on its mandate and government priorities.

Challenging economic times

We must acknowledge the strained economic times that Ontarians are in and react accordingly. Discretionary spending for Ontarians is low, and this may result in changes to attendance patterns, booking preferences and usage numbers. We will work with clients, partners and tenants to maintain activity levels in our spaces while remaining mindful of our own financial obligations.

The Ontario Heritage Act came into being in 1975 and we are 50 years into the landscape of heritage conservation. It is not the same world that it was 50 years ago, and as a result, we need to rethink our current place and invest in opportunities with a fresh perspective.

2. FOUNDATIONAL OPERATING PRIORITIES AND STRATEGIC DIRECTION

The Ontario Heritage Trust cares for places and collections that represent Ontario’s rich and diverse history, and uses them to educate, engage, and inspire the public.

Today, the Trust offers many ways for people to connect with heritage — including museums, historical sites and **Doors Open Ontario (DOO)**. These sites and programs help Ontarians understand their shared identity and foster a sense of belonging.

In 2026, the **Provincial Plaque Program** will celebrate its 70th year. To this day, the program continues to share Ontario’s stories by noting important people, places and events.

The Trust’s five-year strategic plan sets out a clear **vision**: an Ontario where heritage is **valued, vibrant and inspiring**.

Its **mission** is: to **protect and share Ontario’s diverse heritage**, creating lasting connections between the past and the people of today.

To achieve this, the Trust will focus on three main **goals**:

- 1. Manage the portfolio for sustainable impact** — Make smart, transparent decisions about which properties to invest in, ensure that they are safe and well maintained and align them with the Trust’s goals.
- 2. Deliver transformative heritage experiences** — Create engaging programs and exhibits that bring history to life and reflect Ontario’s diversity.

- 3. Connect with communities and stakeholders** — Build strong relationships across the province, listen to community needs and encourage participation in heritage programs.

By doing this, the Trust aims to solve key challenges such as aging infrastructure, deferred maintenance and the need for inclusive storytelling. It will also strengthen financial sustainability, improve accessibility and use technology to share heritage more widely. Ultimately, the Trust wants heritage to be **preserved, celebrated and used as a source of pride and inspiration for all Ontarians — today, and for generations to come.**

3. ENVIRONMENTAL SCAN

INTERNAL

Multi-modal program delivery/programming

The Trust will need to continue developing both in-person and virtual programming to provide meaningful, tangible experiences, as well as expanding its reach beyond physical assets. These different mediums require different resourcing and skillsets to be done properly and effectively.

Asset management

The Trust holds diverse heritage property assets across Ontario that require specialized management and conservation. With many of our properties having been restored over 40 years ago, it is likely that they will require significant and generational-level capital investments. Unfortunately, there are limited grant programs available to fulfill the financial scope of capital work required for these properties.

The Trust's capital program was mostly funded through the Ministry of Tourism, Culture and Gaming's (MTCG) Capital Repair & Rehabilitation (R&R) Program. This program was highly competitive, and funding had not kept pace with annual needs, resulting in significant deferred maintenance. In FY2026-27, the Trust's access to the R&R funding program ceases to exist, and although this transition may create some uncertainty around funding levels, the Trust is engaging with MCM to implement measures that will ensure stability and continuity. As an example, a potential strategy may involve provisional access to restricted funds.

The Trust is responsible for ensuring the management of its properties. Where property and lands management activities are not carried out by a steward under agreement with the Trust, the Trust is responsible for hands-on delivery of these services. The shift to direct operation by the Trust of the Cheltenham Badlands (and the increasing popularity of other Trust properties) requires significant investment of resources to ensure a safe and appropriate visitor experience.

EXTERNAL

Climate change and environmental risks

Rising climate threats: Extreme weather events, flooding, wildfires and rising sea levels are accelerating deterioration of heritage properties worldwide. UNESCO reports that [80 per cent of](#)

[World Heritage Sites face climate stress](#), and Ontario's natural heritage sites are not immune to these risks. Trust sites are experiencing a range of impacts (including wind damage) that is resulting in the need for hazard tree and tree management.

Adaptation pressure: Heritage organizations are being called to integrate **climate resilience strategies** into conservation plans, including sustainable materials and energy-efficient upgrades (see this [UNESCO article](#) for more information).

Economic Pressures and Inflation

Escalating costs: Inflation and rising construction costs are making restoration and maintenance more expensive, while energy and insurance costs are straining budgets. [Many heritage organizations report financial vulnerability due to these factors](#). The Trust is routinely receiving higher-than-anticipated bids for capital project procurements.

Policy and regulatory changes

Ontario Heritage Act amendments: Recent legislative changes (for example, Bill 23 and Bill 200) impose stricter timelines for designating heritage properties and allow for the deregistration of non-designated sites, Municipalities are increasing the rate at which they are designating properties, and the Trust is having to ensure that these properties are uploaded to the OHA Register in a timely manner. Future amendments (like Bill 5) will further change how heritage is protected in the province.

Housing development priorities: [Provincial policies aimed at accelerating housing supply may conflict with heritage conservation goals, creating tension between development and preservation.](#)

Technological transformation

Digital engagement: Heritage interpretation is shifting towards immersive technologies, such as digital twins (a virtual representation of a physical object, system or process that uses real-time data to simulate its behaviour and performance throughout its lifecycle) to enable virtual tours and interactive storytelling. These tools can enhance the visitor experience and broaden access, but they will require investment and expertise.

AI and data analytics: [Machine learning is being used for predictive maintenance, artifact restoration and personalized visitor experiences, but raises ethical and equity concerns.](#)

Heritage tourism trends

Market growth: [Heritage tourism is expanding](#), with global market size expected to reach **US\$778 billion by 2030**, driven by experiential travel and cultural authenticity. Overcrowding and site degradation, however, pose risks that require careful management.

Changes in attendance patterns: [The rise of staycations has led to significant changes in attendance patterns, particularly among urban residents and travellers.](#) Staycations have become a popular choice for those seeking a more localized and sustainable travel experience. Tourism from the United States is being impacted by global uncertainty. Canadians are limiting their visitation to the United States, however, and it remains to be seen whether this will translate into increased visitation within Canada.

4. INITIATIVES INVOLVING THIRD PARTIES

In support of the provincial government's efforts to deliver on the plan to *Protect Ontario* by building the most competitive, self-reliant and resilient economy in the G7, the Trust will work through our relationships with third parties to help:

- Prioritize Ontario-made goods and services in public procurement to make sure Ontario tax dollars support Ontario workers through the [Buy Ontario Act, 2025](#)
- Cut red tape and support trade, investment and economic growth to strengthen Ontario's competitiveness through the [Building a More Competitive Economy Act, 2025](#)
- Reduce regulatory burdens to save people and businesses \$5.8 million and more than 256,000 hours every year through the [Protect Ontario by Cutting Red Tape Act, 2025](#)

The Trust maintains a wide range of relationships with tenants and licensees (for example, site operators and stewards — including conservation authorities, municipalities, federal agencies, provincial ministries and agencies, Indigenous communities and land trusts, school boards, charitable foundations, universities, 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 building/property sites regularly to ensure optimal stewardship and program implementation

The Trust works with third parties in the following ways:

- **155** site management and operating agreements with conservation authorities, naturalist organizations, land trusts, foundations, Ontario Parks, the Ministry of the Environment, Conservation and Parks, the Ministry of Natural Resources, municipalities, Indigenous communities, friends' groups, ministries, educational institutions, property management companies, and other non-government organizations to manage Trust-owned natural and cultural heritage properties
- **226** conservation easement property owners, which include municipalities, public bodies, not-for-profit non-governmental organizations, private for-profit corporations, and individuals
- **245** municipalities (out of a total of 444 Ontario municipalities) with designated properties included in the Ontario Heritage Act (OHA) Register

5. OVERVIEW OF CURRENT AND FUTURE PROGRAMS AND ACTIVITIES

The current activities of the Trust are oriented to meet the goals set out in the 2025-2030 Strategic Plan, the legislated mandate and the annual Letter of Direction from the Minister.

Goal #1: Manage the portfolio for sustainable heritage impact

The Trust cares for **193 heritage properties** across Ontario—169 natural sites and 24 cultural sites. These include historical buildings, sensitive ecosystems, archaeological sites, and landmarks. We also safeguard over **25,000 cultural artifacts** and over **one million archaeological objects**. Our job is to protect these treasures and make them accessible for people today, and for future generations.

These properties and collections tell the story of Ontario—its communities, cultures, and landscapes. Preserving them ensures that Ontarians can learn from the past, feel connected to their heritage, and enjoy unique places that enrich their lives.

The Trust faces several challenges in managing its portfolio. Many buildings and infrastructures are aging and need constant care and investment. The Trust must balance conservation with public access and revenue generation, adapt historical spaces for modern use while preserving their character, and manage properties spread across the province — all with limited resources.

We aim to keep heritage sites safe, welcoming, accessible and sustainable. We also aim to make smart decisions about property use and long-term care, find creative ways to reuse heritage spaces while preserving what makes them special, and strengthen planning and partnerships to ensure sustainability.

1. Conservation and capital planning

The Trust works to conserve heritage properties and their associated collections using recognized international, national and provincial standards. The Trust, as steward, is responsible for addressing urgent repairs and ongoing maintenance, while also protecting the heritage features of each property. The Trust also protects natural heritage by removing invasive species and managing erosion - we also document and protect the artifacts and archaeological materials associated with its properties.

CHALLENGE: Caring for historical properties is challenging because their building fabric continues to age and they were built using older methods. They also face wear from age, weather and changing use. Maintaining these sites and collections costs millions of dollars each year. Construction sector costs alone are causing projects to be more expensive. And unsafe structures may require dismantling, or demolition entirely.

DELIVERING ON THE STRATEGIC PLAN: Undertaking conservation audits to assess condition and using that information to create strategies and plans will ensure that decisions are based on urgency, public impact, accessibility and return on investment.

In 2026-27, we will:

- Update conservation audits to assess current conditions and track progress
- Create risk management strategies to reduce liabilities at high-risk sites (for example, Willoughby, Smith, Hope Smith and the Cheltenham Badlands)
- Use condition information to develop long-term conservation plans — including sustainable funding options — to address major capital needs (for example, life-cycle replacements),

prioritize infrastructure upgrades (for example, deferred maintenance) and schedule urgent repairs at high-risk properties

- Explore strategic acquisitions or deaccessions to align with the Trust’s mandate and improve care for properties
- Procure from Ontario and Canadian businesses, whenever feasible, when undertaking capital work

2. Monitoring and maintenance

The Trust manages a large portfolio of heritage properties, so we need to monitor their condition and make smart decisions about maintenance, repairs and conservation. Our goal is to protect these sites while using resources wisely.

To improve oversight, we are investing in technology and systems to ensure more efficient planning. This includes creating a centralized asset management system, standardizing condition reports and using tools like drones and thermal imaging to track property health.

In 2026-27, we will:

- Prioritize regular maintenance to prevent costly repairs in the long term.
- Complete baseline reports for natural heritage properties to guide stewardship plans.
- Conduct condition assessments and conservation plans for cultural heritage sites.
- Partner with colleges and universities for research and internships to support conservation work.
- Launch a centralized asset management system and standardize documentation.
- Use digital tools (like drones and thermal imaging) to improve monitoring.
- Renew agreements with local partners to keep properties safe, accessible and sustainable.

Leveraging new technology to care for heritage – Drones

The Trust is introducing drones as a tool to monitor its heritage properties. Drones can capture high-resolution images and videos of roofs, façades and hard-to-reach areas without scaffolding or ladders. This is especially useful for historical buildings, where physical access could damage fragile structures. Equipped with thermal cameras, drones can also detect heat loss, moisture intrusion and structural weaknesses. They can also identify cracks, erosion or vegetation growth on heritage sites, quickly and accurately. The data captured can then be used to print 3D models and detailed maps of properties, which help to track changes over time. The use of this new technology reduces costs (compared to traditional inspections), minimizes physical impact on sensitive heritage structures and provides accurate, real-time data for decision-making.

3. Property use

Heritage properties are more than historical buildings. They are vibrant spaces for today’s communities. Over time, many sites have adapted to new uses. These changes show how heritage spaces can remain relevant while preserving their history.

The Trust makes its properties available to the public for a variety of uses. Short-term uses include event space rentals, commercial usage, filming, licensing heritage theatres for performances and booking spaces for photoshoots. Longer-term uses include commercial leases, residential tenancies and license agreements with non-profit organizations.

By carefully assessing which properties are used, and in which ways they are being used, we can enhance their heritage value, judiciously use Trust resources, ensure public access and maximize revenue generation of each site — while ensuring ongoing care and conservation.

CHALLENGE: As social values and land use priorities change, the Trust faces challenges in maintaining and activating properties across Ontario. Some properties are currently under-used. It is not always obvious how to balance conservation needs with contemporary use, improved accessibility, and contemporary amenities.

DELIVERING ON THE STRATEGIC PLAN: A comprehensive audit of current property usage (cultural and natural) and their associated agreements will identify where there are challenges and where the Trust is finding success. This data will be used to build a decision framework for property use. This clear, principled property-use framework will build clarity and transparency on space-use decisions and ensure that the Trust has the capacity to leverage its properties to deliver on its mandate and achieve financial sustainability. A new revenue audit and pricing strategy will help increase income and guide decisions about property activation.

In 2026-27, we will:

- Create a decision framework for property use, including use by third-parties
- Conduct audits to assess current uses, barriers, and potential for all properties
- Upgrade theatrical lighting at the Elgin & Winter Garden Theatres to meet industry standards
- Expand branding and outreach for the theatres to attract new clients
- Revise pricing strategies based on market benchmarks and revenue audits
- Review space-use policies and residential tenancy portfolios to improve outcomes
- Bring underused properties back into use, increasing lease and license revenue by 20 per cent

Project: Removing the collection from Inge-Va

The Trust is planning to remove the collection currently housed at Inge-Va, a historical property in Perth. This collection limits how the space can be used because it requires controlled conditions and restricts access for events or other activities.

By relocating the collection to a more suitable facility, the property will become more flexible and accessible. This will allow Inge-Va to host a wider range of uses—such as community programs, cultural events, and rentals—while still preserving its heritage value. The change will also improve flexibility of the space.

Scotsdale Conservation Management Plan

Scotsdale Farm will become a model for balancing commercial opportunity with environmental and heritage stewardship through the development of a comprehensive Conservation Management Plan.

This plan will make the site easier and more attractive for filming by clearly identifying seasonal no-go zones and preparing spaces that can be quickly adapted for production needs. By investing in thoughtful planning, we will create a framework that allows the flexible use of the property while protecting ecologically sensitive habitats and heritage features. This approach reduces uncertainty for film crews, streamlines access, and positions Scotsdale Farm as a reliable, premium filming destination. The result is a strategy that maximizes revenue potential without compromising long-term conservation goals, ensuring that the site remains both profitable and sustainable.

Goal #2: Deliver transformative heritage experiences

Starting with the Provincial Plaque Program over 70 years ago, the Trust has expanded its transformative heritage experiences to include visitor attractions, interpretation studies and commemorative programs to explore why Ontario is the way it is today. These initiatives highlight important people, places, and events, showing how Ontario's diverse communities and landscapes

have shaped the province. By sharing these stories, the Trust inspires curiosity, pride, and a sense of belonging.

What this goal aims to do:

- **Make heritage relevant and valued** — Share diverse stories that reflect Ontario’s cultural and historical complexity.
- **Inspire curiosity and engagement** — Use storytelling and experiences to connect people emotionally and intellectually to the past.
- **Celebrate Ontario’s shared identity** — Continue to explore and highlight contributions from Indigenous, Francophone, veteran, racialized, and other communities.

How we deliver this goal:

- **Visitor attractions** — Historical sites and natural landmarks that bring heritage to life
- **Public programs** — Tours, lectures and educational activities that promote understanding and inclusion
- **Interpretation** — Exhibits, signs and digital tools that tell Ontario’s story
- **Commemoration** — Plaques and markers that honour significant people, places and events

Visitor attractions

The Trust operates several historical sites and natural landmarks as heritage attractions, allowing casual visitors to connect with the province’s history and heritage. A casual visitor is an individual who visits a place or establishment for leisure, relaxation, or entertainment purposes without any specific objective or agenda. This type of visitor does not have any prior appointment or reservation and generally does not stay for an extended period. Visitor attractions include:

- **Josiah Henson Museum of African-Canadian History** — Shares the story of Josiah Henson and the Underground Railroad, offering exhibits and programs about Black history in Ontario
- **Fulford Place** — A grand Edwardian mansion in Brockville that showcases early 20th-century life through guided tours and exhibits
- **Cheltenham Badlands** — A striking geological feature in Caledon that highlights Ontario’s natural heritage and attracts tens of thousands of visitors each year

These sites contain interpretive signs and permanent exhibits that bring the story of the site to life. The Trust ensures that these experiences are inclusive, accessible, and reflective of Ontario’s diverse stories. These sites receive tens of thousands of visits per year.

In 2026-27, we will:

- Partner with government agencies to promote heritage tourism and increase attendance at Trust sites
- Complete an accessibility audit of visitor attractions and create a plan to address issues
- Conduct visitor satisfaction surveys and use feedback to improve experiences

Feature project: Investing in the Cheltenham Badlands

The Cheltenham Badlands is one of Ontario's most popular natural attractions, and visitation continues to grow each year. To accommodate this demand and protect the site, the Trust is investing \$250,000 in improvements that will:

- Expand and upgrade visitor facilities for comfort and accessibility
- Enhance interpretive signs and educational features to explain the site's geological and cultural significance
- Improve pathways and viewing areas to manage visitor flow and reduce environmental impact

These upgrades will make the Cheltenham Badlands safer, more informative and better equipped to welcome increasing numbers of visitors while preserving its unique landscape.

Public programs

The Trust offers a variety of public programs that help people connect with heritage. Programs like virtual school tours of the Josiah Henson Museum during Black History Month, guided tours of the Elgin & Winter Garden Theatres and holiday open house events at Fulford Place provide curated experiences for people to experience our properties in a more in-depth manner.

These initiatives can be fun experiences in unusual spaces that foster pride and community connection, or profound interactive explorations of equity, diversity, inclusion, reconciliation and anti-racism. These initiatives can also highlight an aspect of our past that visitors may not have known much about before.

The Trust aims to provide inclusive, multi-faceted, interactive programs that reflect the diverse audiences and narratives of Ontario's population and bring heritage and historical spaces to life through shared experiences. The Trust also aims to make programs interactive and inclusive, bringing historical spaces and stories to life.

CHALLENGE: While these programs are impactful, delivering them across many sites requires significant resources.

DELIVERING ON THE STRATEGIC PLAN: Developing accessible digital tools will expand the Trust's reach. By monitoring usage and measuring how and when the public is engaging, the Trust will be able to target its efforts to areas with the most impact. The Trust aims to ensure that its programs are accessible and inclusive. It is essential to benchmark current levels to understand where and how to improve.

In 2026-27, we will:

- Develop lectures, walks, digital programs and articles that are part of a cohesive interpretation strategy for the Trust, to inspire curiosity and strengthen Ontario identity
- Develop online teacher resources about Ontario's history to encourage critical thinking
- Use technology to expand engagement across the province
- Implement tools to measure inclusivity, program impact, and public engagement
- Develop walking and driving tours for the website that will allow people to send tours to their phones and share with others

Enhancing provincial plaques

The Trust will be undertaking a pilot project where passers-by will be able to access additional information about plaque subjects via a QR code. This pilot aims to test the public's interest in accessing additional information in this way and to enhance the public's experience in engaging with the plaques.

Educational resource development

The Trust is creating educational resources for teachers and students to support Ontario's new curriculum. These virtual tools and activities will connect classrooms with Ontario's heritage and the Trust's sites and programs. Building on past partnerships (such as work with Trent University), these resources will encourage students to think critically, learn about local and provincial history and understand how heritage is relevant to their lives and communities. The resources will also reflect the diversity of Ontario's cultures and geography.

Interpretation

Our heritage properties hold many stories about Ontario's past. They invite us to ask questions, such as: What was here before? How have people used these places over time? What events have shaped them? These sites help us understand how Ontario was built — and how this province continues to be shaped.

The Trust shares these stories through interpretive signs, exhibits (on-site and online), and publications. These efforts aim to ensure that we will help all Ontarians see themselves in the province's story.

CHALLENGE: Currently, interpretation varies across sites and needs a consistent, province-wide approach.

DELIVERING ON THE STRATEGIC PLAN: As the Trust aims to foster provincial identity and a sense of belonging and to increase an appreciation of Ontario's diverse heritage, it is essential that we have a strong curatorial foundation to refresh exhibits, expand inclusive storytelling, and develop interactive maps to reach more people. Research and content development is the first essential step to supporting education, fostering pride and helping Ontarians understand their place in the province's evolving story.

In 2026-27, we will:

- Review interpretation and programming at Trust-operated sites (for example, Josiah Henson Museum, Fulford Place, Enoch Turner Schoolhouse, Fool's Paradise, Cheltenham Badlands and the Elgin & Winter Garden Theatres)
- Create a timeline of Ontario's history to provide a clear, inclusive foundation for storytelling
- Partner with government agencies to uncover stories that celebrate Ontario's heritage
- Work with veterans' organizations to research and interpret places of memory related to veterans
- Launch public storytelling campaigns through social media and video to help all Ontarians see themselves in the province's story
- Develop a framework for technology tools and systems to streamline operations and support interpretation programs

A timeline of the history of Ontario

The Trust is developing an online resource to connect Ontarians to the broader story of the province they live in, encouraging a sense of shared history and belonging amongst its many peoples, and geographies.

The timeline of the history of Ontario project will provide foundational information about the significant milestones that make up the broad history of this land, mapping events on a chronological timeline for users to find connections between events and historical themes. Trust properties, plaques and exhibits will be included, wherever possible, weaving their significance into the story of Ontario.

This timeline will create engaging connections between the history of this land and its people, all through the story of Ontario.

Commemoration

Ontario's story is shaped by the people who came before us and the events, and decisions that happened in the places we live and visit. The Trust runs programs that commemorate important people, places, and events.

Commemorative markers make history visible in public spaces and celebrate the diverse contributions that built Ontario. They help communities remember shared heritage, milestones, and values. By marking these contributions, The Trust helps people experience their communities in a richer way.

CHALLENGE: Many plaques now need repair, relocation, or replacement, and the policy around the Provincial Plaque Program needs updating to include, among other things, underrepresented communities.

DELIVERING ON THE STRATEGIC PLAN: The Trust needs strong, clear and transparent policies and procedures to ensure that its commemoration programs are sustainable and effective. By reviewing its plaque funding model, updating plaque policy and exploring ways to strengthen collaboration with Ontario communities on commemoration opportunities, the Trust will create a firm foundation to engage the public better with heritage stories and to support the appreciation of Ontario's diverse heritage.

Key programs:

- **Provincial Plaque Program:** Since 1955, the Trust has installed 1,300 plaques across Ontario to honour significant people, places, and events.
- **Premiers' Gravesites Program:** This program marks the gravesites of former Ontario premiers to recognize their historical contributions.

In 2026-27, we will:

- Update the Provincial Plaque Program policy for transparency, clarity and effectiveness
- Review funding and create a dedicated fund for repairs, new plaques, replacements and relocations
- Explore ways to commemorate cultural communities, Ontario veterans and veteran-serving organizations and their contributions

Key initiatives

Recognizing Ontario's veterans

The Trust will honor Ontario's veterans and military history through online programs, new plaques and outreach. This includes unveiling a plaque for John Andrew Hope, a First World War veteran who helped establish the Great War Memorial Hospital in Perth. These efforts explore how Ontario commemorates service and sacrifice.

New plaques for Ontario's diverse heritage

In 2026–27, the Trust will work with community groups to install new provincial plaques that reflect Ontario's cultural and geographic diversity. These plaques will share untold stories about Indigenous, Francophone, northern, veteran, and rural communities. Planned subjects include:

- McGaw Wendat Village
- Proulx Cheese Factory
- Galt Football Club
- The Mohawk Institute
- From Ruther Glen to the Pacific Ocean
- John Andrew Hope
- Tobacco Plantation Industry
- Farmerettes
- Research in Motion and BlackBerry

Goal #3: Connect with communities, stakeholders and the public

The Trust wants to build stronger relationships with communities and the public by raising awareness of its role in protecting, promoting and preserving Ontario's heritage and encouraging shared responsibility.

We aim to make the Trust more visible through storytelling, digital campaigns, branding and media partnerships.

We know that there is a continuum of public engagement with the Trust and its work. From seeing or engaging with a social media post or ad, seeing a story about the Trust's work in the news, reading the Trust's newsletter, attending a visitor site, participating in public programs and events, accessing information from the Trust, receiving an award, volunteering or making a donation, people across the province are connected to our work.

The Trust is dedicated to fostering and growing this engagement, understanding the impact of the Trust's work on communities, and celebrating community contributions through awards and recognition to inspire pride and belonging.

To achieve this, the Trust focuses on three main services:

- **Recognition programs**
- **Community support programs**
- **Community engagement initiatives**

Recognition programs

Celebrating the history and heritage of Ontario is a shared effort. Communities, organizations, municipalities, and individuals across the province all play a role in protecting and commemorating our heritage. For years, people have worked hard to save, restore, and research heritage sites and stories so they can be enjoyed by future generations. Many continue this important work today. Recognizing these contributions honours their efforts, inspires others, and helps share solutions to common challenges. We stand with them, supporting and celebrating their achievements.

The **Lieutenant Governor's Ontario Heritage Awards** celebrate exceptional contributions to heritage conservation, knowledge sharing, and community leadership across Ontario. Held annually at Queen's Park, these awards recognize individuals and organizations whose work reflects our shared heritage values. By showcasing these achievements, the Trust aims to inspire others, highlight innovation, and deepen the appreciation for Ontario's diverse heritage.

In 2026-27, we will:

- Expand outreach to increase applications from regions outside the Greater Toronto and Hamilton Area (GTHA)

Recognizing Ontario's veterans

The Trust will honor Ontario's veterans and military history through outreach. This includes targeted outreach to ensure that veterans and veteran-serving organizations are aware of the opportunity to be recognized through the **Lieutenant Governor's Ontario Heritage Awards**. These efforts explore how Ontario commemorates service and sacrifice.

Community support programs

The Ontario Heritage Trust runs programs that help communities protect and celebrate heritage. These programs include:

- **Doors Open Ontario (DOO)**
This province-wide program works with municipalities to host free heritage events from April to October each year, enabling people to visit heritage buildings that are usually closed, boosting tourism, supporting local businesses and connecting communities.
- **Heritage conservation easement agreements**
The Trust manages 265 easement agreements (69 natural and 196 cultural) to help property owners protect heritage features.
- **Database and advisory services**
We maintain heritage registers and databases, including information on plaques, properties, and collections. The Trust also provides advice and training to municipalities and heritage groups and shares research to help communities protect and celebrate Ontario's heritage.

Doors Open Ontario (DOO) – 25th season (2026)

In 2026, the Trust will celebrate **25 years of DOO**, a program that invites people to explore heritage sites and buildings that are usually closed to the public. As part of this season, the Trust will:

- Highlight the program's impact on heritage conservation and community engagement over the past 25 years
- Share stories about how the program has grown and changed over time
- Highlight the most popular sites over the years and acknowledge places that may no longer be standing
- Showcase Ontario's diverse history and architecture
- Work with communities to showcase veteran-related sites during DOO

Advisory services and database

The Trust helps communities protect and celebrate heritage by sharing knowledge, tools and resources. We maintain centralized databases, including the Ontario Heritage Act Register, and information on plaques, properties, and collections, to support planning and public access. The Trust also provides advice, training, and support to municipalities, heritage professionals, and local groups, including the Heritage Planners Network. Through research and policy development, we guide the Minister and help communities understand heritage trends.

In 2026-27, we will:

- Provide support to participating communities to increase participation from faith-based groups, veterans' organizations and diverse communities in DOO events
- Launch a funding program with Indigenous Affairs and First Nations Economic Reconciliation (IAFNER) to help Indigenous communities recognize and commemorate the 18 federally recognized residential schools in Ontario
- Create a regular monitoring schedule for heritage conservation easement properties and to ensure that all documentation is complete
- Review Heritage Conservation Easement Agreements (HCEA) with property owners to ensure that they feel supported in their conservation and preservation efforts and to support the timely processing of alteration requests

Community engagement initiatives

Measuring and communicating the Trust's impact is an important part of our work. This includes sharing stories about ongoing conservation and archaeology work as well as promoting events, public programs and visitor attractions.

The Trust uses a range of outreach tools to engage the public, including its websites and active social media channels. Digital storytelling and media campaigns showcase the Trust's work and encourage attendance, involvement and donations.

We also work to measure the results of public programs, conservation investments, restoration work and other economic contributions — from tourism and film production to skills development in heritage fields.

CHALLENGE: Public recognition remains uneven, so improving visibility and driving attendance through better metrics and outreach strategies is a priority.

DELIVERING ON THE STRATEGIC PLAN: We are expanding fundraising efforts and enhancing donor experiences while developing tools to measure inclusivity, program impact and audience engagement. By raising awareness and inviting participation we drive attendance and build strong community support

for the work of the Trust. These efforts ensure that our services remain accessible and relevant, and that they underpin diversified revenue sources for a sustainable organization.

Community engagement initiatives for 2026-27:

- **Update visuals and videos** so everyone can see themselves reflected in our sites and programs
- **Share stories about the Trust's work** through web exhibits, social media, and partnerships with local storytellers and influencers
- **Deliver marketing campaigns to promote key programs** to raise awareness of plaques and awards and to increase attendance at our four visitor attractions
- **Create and share heritage resources** for students, educators and curious visitors — such as maps of Trust properties, plaque details and updated site information
- **Keep communication open for public events** and work with MCM to ensure awareness and participation at unveilings and ceremonies

Adopt-a-Building

The **Adopt-a-Building** project invites individuals, businesses and community groups to “adopt” a heritage property cared for by the Trust. By adopting a building, supporters contribute funds to help maintain and preserve the site. In return, they receive recognition, updates on restoration work, research projects, archaeology work, uses of the property and opportunities to participate in special events. This program helps keep historical buildings safe, accessible and vibrant while fostering community pride and shared responsibility for Ontario’s heritage. It also highlights the exciting contemporary uses of properties, the key challenges of managing heritage properties and the ongoing vibrancy and relevance of important heritage assets.

6. PERFORMANCE MEASURES

	2025-26 target	2026-27 target	2027-28 target	2028-29 target	2029-30 target
Maximize the value and use of properties					
% of cultural heritage properties fully utilized	54	65	76	87	98
\$ total of business centre revenues (rentals, leases, ticketed admissions)	\$2,835,451	\$3,860,854	\$4,053,897	\$4,246,940	\$4,459,286
# of days that EWG theatres are occupied	315	125	130	135	150
# of days that Trust venues are rented	575	604	634	666	734
Ensure heritage assets are safe, accessible and financially sustainable					
% of asset replacement value spent on repairs and maintenance	1.00	1.25	1.50	1.75	2.00
% of asset replacement value spent on capital investment	1.50	1.75	2.00	2.00	2.00
Strengthen systems for asset tracking, planning and decision-making					
% of heritage properties with up-to-date condition reports	70	75	81	87	100
% of cultural heritage properties with a strategic conservation plan	-	10	25	50	75
% of natural heritage properties with Baseline Documentation Reports (BDRs)	88	91	94	97	100
Expand access to heritage experiences					
# casual visitors to visitor attractions	50,000	60,000	63,000	66,150	70,000
# of visitors, tours and public programs	10,000	12,000	12,500	13,250	14,000

# of visitors to DOO sites	455,000	477,750	501,638	526,719	580,708
# of new plaques unveiled annually	6	7	8	9	10
	2025-26 target	2026-27 target	2027-28 target	2028-29 target	2029-30 target
Strengthen public awareness, trust and support for our work					
# of total website visits	1,100,000	1,155,000	1,212,750	1,273,388	1,403,910
# of new social media followers	1,500	2,000	2,100	2,205	4,746
# of social media engagements	290,000	304,500	319,725	335,711	370,122
# of media mentions	1,100	1,155	1,213	1,273	1,404
# of media stories about DOO	175	184	193	203	223
Revenue generation through community engagement					
\$ total raised from individual donations	\$58,000	\$100,000	\$110,000	\$121,000	\$133,100
\$ total raised from corporate sponsorships	\$170,000	\$265,000	\$280,000	\$305,000	\$320,000
\$ total raised from foundations	\$45,000	\$50,000	\$52,500	\$55,000	\$60,000
\$ total raised for targeted capital campaigns	-	\$50,000	\$100,000	\$150,000	\$200,000
Maintain the Ontario Heritage Act Register for heritage planning					
% of OHA Register transactions processed within the service standard	95%	96%	97%	98%	99%
Easement advice for heritage property owners					
Average response time for easement alteration requests (in days)	35	30	25	20	15
% of easement properties with up-to-date (within past 5 years) monitoring reports	75	80	85	90	95
% of easement properties with BDRs	70	72	75	78	80

	2025-26 target	2026-27 target	2027-28 target	2028-29 target	2029-30 target
Support communities across the province to deliver DOO events					
# of DOO events	30	32	33	35	38
# of faith-based groups and places of worship participating in DOO	105	110	116	122	134

7. INVESTMENT IN CONSERVATION

The Investment in Conservation Fund was created from the transfer of Trust property (265 Front Street East in Toronto) to Metrolinx in 2021. As per Article 5.1 of the Use of Funds Agreement with the Ministry of Heritage, Sport, Tourism and Culture Industries (at that time), *“The OHT shall hold the Funds in an Externally Restricted Fund, and the Funds shall be managed by the OHT board of directors in accordance with this Agreement.”* The Trust must report on the use of these funds through a section of the Business Plan, as noted herein. There are five uses/allocations approved for the fund, including:

1. A Board-approved acquisitions plan to fund the Trust’s priority initiatives
2. Lost revenue from the termination of the lease of the Property
3. Post-pandemic sustainability of partnerships and new operating models at Trust properties
4. Memorials at Residential School Burial Areas
5. COVID-19 Stabilization Funding (2021-2024)

The 2026-27 budget for the Investment in Conservation Funds is \$1,134,000.

8. CAPITAL PLAN

Funding to be sought through government funding, the use of restricted funds, and fundraising.

Property name	Project name	2026-27 budget	2027-28 forecast	2028-29 forecast
Building conservation				
Multiple sites	exterior maintenance, exterior painting and base building repairs	\$250,000	\$250,000	\$250,000
Multiple sites	Asset Management Information System (including condition assessments)	\$250,000	\$500,000	\$500,000
Bethune-Thompson House	outbuilding stabilization and repair	\$250,000	\$250,000	-
Elgin & Winter Garden Theatres	exterior restoration and repairs	-	\$250,000	\$500,000
Fulford Place	exterior restoration and repairs	-	-	\$500,000
Glassco	building stabilization and repairs	\$100,000*	\$250,000	\$250,000
Homewood	exterior restoration and repairs	\$500,000	\$500,000	-
Inge-Va	exterior restoration and repairs	\$250,000	-	\$500,000
McMartin House	exterior restoration and repairs	\$250,000	-	-
Scotsdale Farm	outbuilding stabilization and repairs	\$250,000	\$250,000	-
Sheppard's Bush	exterior restoration and repairs	\$500,000	\$250,000	-
Sub-total for building conservation		\$2,600,000	\$2,500,000	\$2,500,000

Property name	Project name	2026-27 budget	2027-28 forecast	2028-29 forecast
Natural heritage conservation				
Nochemowenaing	Hunter Court natural restoration	-	\$50,000	-
Cheltenham Badlands	capital improvements and Master Plan upgrades (fence repair and replacement)	\$50,000	-	-
Hope Smith	encroachment removals and restoration	\$20,000	\$10,000	-
Willoughby	signs and trail upgrades	\$45,000	-	-
Scotsdale Farm	parking upgrades/pond restoration	-	\$80,000	\$150,000
Smith	plantation thinning	\$100,000**	-	-
Sub-total for natural heritage conservation		\$215,000	\$140,000	\$150,000
Visitor attractions				
Cheltenham Badlands	visitor amenity upgrades (washrooms, auto-pay updates in 2026-27, pavilion, trail improvements, and the parking lot)	\$250,000	-	-
Sub-total for visitor attractions		\$250,000	-	-

Property name	Project name	2026-27 budget	2027-28 forecast	2028-29 forecast
Collections				
Long-term cultural and archaeological collections and storage	feasibility study for constructing an off-site collections storage facility	-	\$75,000	-
Inge-Va	relocating ground-floor furnishing to allow for leasing of the site	\$5,000	-	-
Pressed Metal Building	consolidating or relocating Pressed Metal Building to Rockwood Academy	\$7,000	-	-
Elgin & Winter Garden Theatres	scenery flats removal to support cascading lounge painting	\$80,000	-	-
Sub-total for collections		\$92,000	\$75,000	-
Heritage Venues				
Ontario Heritage Centre	Visitor amenity upgrades	\$45,000	\$200,000	\$100,000
Enoch Turner Schoolhouse	Visitor amenity upgrades	\$50,000	\$200,000	\$150,000

Sub-total for Heritage Venues		\$95,000	\$400,000	\$250,000
Elgin & Winter Garden Theatres (EWG)				
EWG Operations	18 projects	\$240,000	\$625,000	\$340,000
EWG Production	14 projects	\$1,240,000	\$1,525,000	\$1,000,000
Sub-total for EWG		\$1,480,000	\$2,150,000	\$1,340,000
*This property is under long-term license to TRCA. TRCA is responsible for building maintenance. Discussions with TRCA are underway to ensure appropriate maintenance is carried out.				
**This project is planned to be cost neutral. Harvested lumber is being sold to offset the cost of the tree management project.				
OVERALL TOTALS		\$4,732,200	\$5,265,000	\$4,240,000

Funding source	2026-27 budget	2027-28 forecast	2028-29 forecast
Government funding	\$2,600,000	\$2,500,000	\$2,500,000
2026 Parks Canada — National Cost Sharing Program for Heritage Places (NCSPHP) program funding application	\$500,000	-	-
Fund 215 — EWG business development capital	\$205,000	-	-
Fund 281 — EWG donations	\$50,000	-	-
Fund 603 — EWG centennial	\$50,000	\$400,000	-
Fund 910 (Willoughby)	\$43,000	-	-
Revenue from sale of harvested lumber at Smith property	\$100,000	-	-
Nochemowenaing (Fund 560)	\$50,000	-	-
Fund 306 — Investment in Conservation Fund	\$1,134,000		
TOTAL	\$4,732,000	\$2,900,000	\$2,500,000

9. FINANCIAL ASSUMPTIONS

Operating revenue:

MCM operating grant — The annual operating grant from MCM is expected to remain at \$4,368,500. The annual contribution of \$20,000 for the Premiers' Gravesites Program is expected (as set out in the MOU for this program).

Other ministry grants

The Trust can support student employment. The budget is based on recent ministry allocations of five summer students, equalling \$25,000.

Provincial grants

The Trust has an agreement with the Ministry of Francophone Affairs, under the Canada-Ontario Agreement on Minority Language Services (2023-28), for funding of \$17,000 in 2026-27.

The Trust has a partnership with the Ministry of Indigenous Affairs for Nochemowenaing at \$35,000 (per MOU).

Federal grants

Young Canada Works student funding is anticipated at \$21,000.

Fundraising and sponsorship

The target is to raise \$465,000 from donations (\$100,000), corporate sponsorships (\$265,000), foundation support (\$50,000) and capital campaign contributions (\$50,000). This includes sponsorships from RBC for Emancipation Day, which are approved for the year, and from Canada Life for the Youth Strategy and from TD for Doors Open Ontario.

Business revenue

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

Long-term lease rentals

Income from commercial, not-for-profit and residential leases are planned to increase by 20 per cent.

Short-term licenses

Revenue from renting heritage spaces for special events (including weddings) is planned to continue to grow by 20 per cent. Corporate meetings are expected to generate minimal revenue.

Rentals for film locations and activities are projected to continue to be strong. Total revenue is projected to increase 20 per cent.

Anticipated revenues at the Elgin & Winter Garden Theatres are expected to be \$2.49M.

Investment income

Investment is estimated to generate \$3.0M. Investment returns are significantly impacted by the financial markets, including changing interest rates and uncertain equity and bond markets that will impact investment returns. Returns will also be impacted by diminishing fund balances, as 2026-27 expenditure commitments are realized.

Programming income

It is anticipated that the museums,' gift shops and the Cheltenham Badlands income will increase by 20 per cent in FY2026-27.

Expenditures:

Salary and benefits expenses

This amount includes the cost for 58 full-time equivalents (FTEs) and two seasonal staff.

Operating and program delivery expenses:

Business centre operations

The EWG's direct operating expenses are flow-through expenses and are expected to increase; they are recovered through receivables from the venue licensee. The Heritage Venues direct operating expenses are flow-through expenses.

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 for upkeep and stewarding the Trust's portfolio of cultural and natural heritage properties. Increased public activity at Trust sites requires increased levels of maintenance.

Program delivery

Restricted fund spending is expected to increase for digitization projects, marketing costs, the Provincial Plaque Program, DOO, the Doris McCarthy Artist-in-Residence Program and the Lieutenant Governor's Ontario Heritage Awards. Program delivery also includes the cost for the Trust to run its operations (unit costs).

Board-restricted Investment in Conservation (Fund 306)

The Board-restricted budget supports work to address the development of new operating models and partnerships, older provincial plaques (for replacement or repositioning, including outdated language and terminology), and funds to offset base rent at the First Parliament site until 2034. It is anticipated that \$3,042,200 will be spent in FY2026-27.

Externally restricted investment in conservation (Fund 616)

The externally restricted budget supports work to address continued implementation of the Strategic Acquisitions Plan, and work to support the commitment related to commemorating Residential School burial areas. \$380,000 is expected in FY2026-27.

Operating surplus/(deficit):

The Trust's operating budget is forecasted to result in a surplus of approximately \$9,500 in the general fund and a combined operating deficit (all funds) of (\$713,000), including planned use of restricted funds. The capital budget is forecasted to have a deficit of \$1,632,000.

Capital:

To date, the Trust has accessed funding for the capital repair and rehabilitation of its heritage portfolio from the MTCG R&R program. Our access to this program expires in August 2026 and it will not be extended. The Trust will work with MCM to consider long-term options to access capital funding. Currently, capital funding processes and amounts are unknown. They have been budgeted based on need and previous historical allocations.

ONTARIO HERITAGE TRUST OPERATING FINANCIALS	2025-26		Variance Explanation	2026-27			2027-28	2028-29
	Budget	Actual Forecast		Forecast			Forecast	Forecast
	COMBINED	COMBINED		GENERAL FUND BUDGET	RESTRICTED FUND BUDGET	COMBINED	COMBINED	COMBINED
REVENUE								
MCM OPERATING GRANT	3,809,000	4,368,500	Increase in operating grant	4,368,500	-	4,368,500	4,368,500	4,368,500
OTHER GRANTS	47,000	47,000		25,000	20,000	45,000	45,000	45,000
PROVINCIAL GRANTS	35,000	35,000		-	52,000	52,000	67,000	52,000
FEDERAL GRANTS	25,000	-		-	21,000	21,000	21,000	21,000
FUNDRAISING, SPONSORSHIPS AND PARTNER FUNDING	312,500	290,000		100,000	365,000	465,000	442,500	481,000
- individual donations	58,000	98,125	Major donation received	100,000	-	-	110,000	121,000
- corporate sponsors	134,500	140,000		-	190,000	-	205,000	230,000
- Doors Open Ontario sponsorship	75,000	-	Funding received in previous fiscal year	-	75,000	-	75,000	75,000
- foundations	45,000	51,875		-	50,000	-	52,500	55,000
- capital campaign	-			-	50,000	-	-	-
BUSINESS CENTRE INCOME	2,835,452	2,880,000		3,860,854	-	3,860,854	4,053,897	4,246,940
INVESTMENT INCOME	2,290,000	6,955,000	Strong return results from investments	1,221,000	1,782,500	3,003,500	3,153,675	3,311,359
MUSEUM ADMISSIONS AND GIFT SHOP	78,950	100,000		44,520	-	44,520	46,746	49,083
OTHER INCOME	225,866	355,000	Court case settlement	280,800	-	280,800	294,840	309,582
Doors Open Ontario program fees	-	20,000		-	34,000	-	34,000	34,000
COVID-19 STABILIZATION	-	-		-	-	-	-	-
TOTAL REVENUE	9,658,768	15,050,500		9,900,674	2,274,500	12,141,174	12,527,158	12,918,464

ONTARIO HERITAGE TRUST OPERATING FINANCIALS	2025-26			2026-27			2027-28	2028-29
	Budget	Actual Forecast	Variance Explanation	Forecast			Forecast	Forecast
	COMBINED	COMBINED		GENERAL FUND BUDGET	RESTRICTED FUND BUDGET	COMBINED	COMBINED	COMBINED
EXPENDITURES								
SALARIES AND BENEFITS	6,464,873	7,420,963	Filled vacant positions and merit & ATB increases	6,799,424	13,000	6,812,424	6,999,766	7,192,260
OPERATING AND PROGRAM DELIVERY EXPENSES	6,058,658	4,455,520	Cost management strategies without compromising program delivery	4,306,740	1,163,680	5,470,420	5,634,533	5,803,568
DOORS OPEN ONTARIO	251,250	158,573	Operating efficiencies	-	226,000	226,000	232,780	239,763
INVESTMENT IN CONSERVATION	1,569,592	419,915	Major component of planned project not feasible within fiscal year	-	380,000	380,000	391,400	403,142
RESTRICTED FUND EXPENSES	-	-		(1,215,000)	1,215,000	-	-	-
TOTAL EXPENDITURES	14,344,373	12,454,971		9,891,164	2,997,680	12,888,844	13,258,479	13,638,733
Operating surplus/(deficit):	(4,686,105)	2,595,529		9,510	(723,180)	(747,670)	(731,321)	(720,269)

ONTARIO HERITAGE TRUST CAPITAL FINANCIALS	2025-26			2026-27			2027-28	2028-29
	Budget	Actual Forecast	Variance Explanation	Forecast			Forecast	Forecast
	COMBINED	COMBINED		GENERAL FUND BUDGET	RESTRICTED FUND BUDGET	COMBINED	COMBINED	COMBINED
CAPITAL REVENUE								
GOVERNMENT FUNDING	2,200,000	1,584,645	Lower than anticipated capital funding from MTCG	-	2,600,000	2,600,000	2,500,000	2,500,000
FEDERAL GRANTS	250,000	0	Awaiting payment following reporting	-	500,000	500,000	-	-
TOTAL CAPITAL REVENUE	2,450,000	1,584,645		-	3,100,000	3,100,000	2,500,000	2,500,000
CAPITAL EXPENDITURES								
INVESTMENT IN CONSERVATION	1,500,000	1,395,542		-	1,134,000	1,134,000	1,665,000	1,665,000
CAPITAL RESTORATION AND RENEWAL EXPENSES	2,962,750	1,801,260	Capital projects adjusted based on approved initiatives	-	3,598,000	3,155,000	3,600,000	2,575,000
TOTAL CAPITAL EXPENDITURES	4,462,750	3,196,802		-	4,732,000	4,289,000	5,265,000	4,240,000
Capital surplus/(deficit):	(2,012,750)	(1,612,157)		-	(1,632,000)	(1,189,000)	(2,765,000)	(1,740,000)

Notes:

The General Fund includes all 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 consist 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 Trust 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.

11. HUMAN RESOURCES AND STAFFING

Staff representation (as of September 2025)

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

Staffing Report

Staffing	As of September 2025
Number of Regular staff	50
Number of Fixed-term staff	4
Number of Part-time staff	0
Seasonal staff (not counted in FTE count)	2
Staffing in process	4
Total staff strength	58

- The Trust's Human Resources (HR) Plan aligns with the Ontario Public Service (OPS) People Plan and is designed to attract, develop and retain a diverse and skilled workforce. This plan focuses on modernization, employee growth, and fostering a culture of inclusion — ensuring that the Trust remains a forward-thinking and inclusive organization.
- The Trust's HR Plan supports the OPS Strategic Goals of:
 - Attracting top talent that reflects Ontario's diversity
 - Developing future-ready talent across all levels of the organization
 - Retaining employees by enhancing the overall workplace experience and organizational culture
- The Trust will support the following HR priority areas and key initiatives:
 - Implementation of HR modernization initiatives
 - Application of LEAN methodologies to streamline Trust HR processes
 - Ensuring that staff have a comprehensive Learning and Development Action Plan
 - Supporting the execution of the Leadership Pledge to foster inclusive leadership
 - Addressing systemic employment barriers through practice reviews
 - Enhancing workplace accessibility
 - Supporting mental health through the Employee and Family Assistance Program (EFAP) and workload management strategies

Return to Office Directive

In alignment with the broader OPS strategy, the Trust will support the Return-to-Office Directive, requiring all staff to return to full-time, in-office work, beginning January 5, 2026. The Trust has a Board-approved policy related to the Return to Office Directive (September 2025).

This HR Plan sets the foundation for a modern, inclusive and high-performing workforce that meets the evolving needs of the Trust and the people it serves.

12. MARKETING AND COMMUNICATIONS STRATEGY

The Ontario Heritage Trust's marketing and communications strategy aims to amplify the Trust's visibility and deepen engagement and participation with the agency. Through compelling storytelling opportunities, brand elevation, promotion of transformative experiences and developing authentic audience connections, we will position the Trust as Ontario's heritage steward and inspire a province-wide community of supporters.

This strategy includes four pillars that together focus on increasing the reach of the Trust, the quality and persuasiveness of our messaging, the size of our audience and the depth of their engagement and of their support. Anticipated outcomes include higher visitation, higher engagement and increased revenue, including at visitor attractions.

Strategic pillars

1. Storytelling

Craft persuasive narratives that demonstrate why the Trust's stewardship of Ontario's heritage matters and showcase the Trust's impact within the heritage field.

2. Brand visibility and awareness

Elevate and protect the Trust's brand through consistent, recognizable messaging and visual identity.

3. Promoting our services to the public

Promote programs and sites to increase participation, revenue at visitor attractions and strengthened community ties.

4. Authentic connections

Build diverse, meaningful relationships with audiences and partners to expand reach, trust and quality of communications.

By aligning our communications with these pillars, we will:

- Enhance the Trust's presence, credibility and positioning at our sites and within Ontario's heritage sector
- Build a more engaged and diverse audience for heritage experiences
- Drive measurable increases in revenue, participation, awareness and support for Trust activities

Tactics and channels

Web presence

- **Corporate website:** Launch the new corporate website, and refresh its content for a more engaging, accurate, and persuasive online experience.
- **Doors Open Ontario website:** Continue as the primary destination for DOO-specific promotions and a hub for provincewide events.

Social media

- **Organic:** Implement the recommendations of the social media refresh, including more short-form reels and thematic campaigns across Facebook, X, Instagram, LinkedIn, YouTube, and Bluesky
- **Paid:** Target high-priority programs, events or campaigns to grow our audience and engage new ones

Media relations

- Issue news releases for announcements and compelling storytelling opportunities

- Refine the Trust’s interpretation strategy and work collaboratively across teams and units to develop more engaging key messages, both Trust-wide and for specific programs or activities
- Foster relationships with journalists and heritage-focused organizations to build trust and deeper connections with sector storytellers

Advertising and partnerships

- Use tactics such as in-kind advertising, print ads, newsletters and influencer collaborations to broaden reach.
- Take broad and narrow approaches as appropriate, including profiling the Trust brand to demonstrate why our stewardship of Ontario’s heritage matters, alongside program-specific or activity-focused methods.

Outcomes

The Marketing and Communications strategy should achieve the following outcomes, according to the above pillars:

For emphasizing storytelling:

- Align internal messaging to create a more unified and compelling brand narrative, as well as more engaging key messages and stories specific to our sites, programs and work
- Enhance credibility and clarity for the Trust within Ontario’s heritage sector, deepening public understanding of the Trust’s role and impact provincially
- Increase media visibility and authentic communications that foster trust and engagement

For increasing the Trust’s visibility through brand awareness:

- Drive higher web traffic and engagement through dynamic tools and experiences, such as organic social media promotion, thematic campaigns and paid advertising
- Boost social ad performance with creative, relevant content
- Ensure visual consistency and impact across logos, signs, symbols and ads for a more recognizable provincially brand identity
- Improve Search Engine Optimization (SEO) rankings for easier access to Trust services online
- Acquire new clients, rentals and supporters

For promoting our services to the public:

- Grow attendance at programs and visitor attractions to increase engagement and drive revenue
- Increase program applications, such as recognition programs and provincial plaques, to ensure that the Trust is meeting its provincially mandate/has provincially reach; provide support to the community to generate consistently high-quality applications
- Forge partnerships with like-minded individuals and organizations for collaborative impact and a Trust that is better integrated within Ontario’s wider heritage sector

For connecting deeply and authentically with our audience:

- Expand and engage audiences, cultivating a network of future supporters who care about and want to know more about what the Trust does

- Deliver more shareable, relevant content that resonates with diverse audiences, including younger Ontarians and new Canadians, to grow interest and engagement with heritage beyond its traditional audience segments
- Build authentic relationships through personalized interactions, encouraging and profiling user-generated content and influencer partnerships

FUNDRAISING PLAN

The Trust is committed to building a broad and engaged community of supporters including individuals, corporations, foundations and government partners who all share in our mission to conserve, protect and promote Ontario’s rich and diverse heritage. Through fundraising, we aim to generate renewable and sustainable resources to support the restoration and stewardship of our properties, deliver inclusive public programming and education and expand access to heritage sites across the province.

In FY2026–27, the Trust will develop a **comprehensive fundraising strategy** that clearly differentiates between grants, donations, sponsorships and naming rights. This strategy will be aligned with the Trust’s Strategic Plan and built around a refined case for support that clearly communicates our value, priorities and impact. By tailoring approaches, we will strengthen our ability to attract the right support for the right initiatives, ensuring both alignment and long-term sustainability.

Targets and measures:

- *Align all fundraising activities with the Strategic Plan and refreshed case for support*
- *Define distinct value propositions for each funding stream*
- *Increase total fundraising revenue*
- *Secure at least one new major corporate partnership*

To strengthen grassroots engagement and encourage local investment in heritage preservation, the Trust will **identify and promote two capital projects for targeted community fundraising**. These projects will serve as pilots to engage donors at the local level and test innovative approaches to building place-based support. In addition, the Trust will select two operating sites to promote ongoing donations, increasing visibility for the sites and offering community members a direct way to support the preservation and programming.

Targets and measures:

- *The Fulford Place garden renewal and the Josiah Henson Museum visitor amenity upgrade have been identified as the two capital projects for community-based fundraising pilots*
- *Develop tailored fundraising plans and recognition programs for each project*

Strengthening donor engagement will continue to be a core focus. The Trust will enhance its use of storytelling, personalized recognition and targeted impact reporting to deepen relationships with existing donors and ensure that they see the outcomes of their contributions. As giving patterns continue to evolve — shaped by digital platforms, social values and changing demographics — the Trust will implement donor engagement strategies that are flexible, responsive and grounded in data.

We will continue to **pursue new sponsorship opportunities** and assess the feasibility of **naming rights for flagship programs** and properties such as the EWG and DOO. These partnerships will be supported by integrated communications strategies that position the Trust as a nimble, forward-looking organization with strong, reciprocal relationships.

Targets and measures:

- *Assess feasibility and develop a Naming Rights Framework by Q3 2026-27, outlining principles, valuation and approval processes*
- *Establish a pipeline of at least two qualified prospects for future naming/sponsorship opportunities*

At the same time, we will focus on **building a wider constituency of support** through targeted community engagement, outreach and advocacy. This includes launching public awareness campaigns that connect the public with Ontario's heritage in meaningful ways and encourage participation.

To demonstrate value and build trust, we will produce a Community Impact Report that communicates our reach, accomplishments and measurable outcomes. These tools will show the public and potential supporters the tangible difference that their contributions make. Communications, fundraising and storytelling will be fully aligned to highlight the significance of our heritage assets and the Trust's leadership in protecting them.

Targets and measures:

- *Introduce an annual Community Impact Report that highlights measurable outcomes*
- *Expand digital engagement and personalized stewardship efforts*
- *Increase donor retention by 10 per cent year-over-year*
- *Produce and distribute the Community Impact Report by Q1 each fiscal year*

Internally, we will continue to **improve our fundraising systems**, including donation data management, reconciliation processes and donor reporting tools. We will also begin building internal mechanisms to collect and analyze donor and visitor data in more consistent and efficient ways. These improvements will support long-term growth, improve donor experiences and more enable strategic decision-making.

Targets and measures:

- *Modernize donation data management and reconciliation processes*
- *Integrate donor and visitor data analytics for improved insights*
- *Reduce reconciliation processing time by 10 per cent*
- *Deliver quarterly fundraising performance dashboards to the Fundraising and Marketing Committee*

Through these efforts, the Trust will advance its commitment to securing the resources necessary to safeguard Ontario's heritage. By cultivating strong relationships, demonstrating impact and clearly communicating the value of our work, we will position the agency as a leading, trusted organization for heritage in the province.

12. RISK CHART

Provincial agency: Ontario Heritage Trust				
Key information	Risk description	Risk management plan	Status of management plan	Risk rating/score
Risk title Property stewardship and conservation risks	Deferred maintenance and capital shortfalls Delays in repairs and conservation can lead to deterioration, safety hazards and loss of heritage value	Work closely with long-term Trust partners to understand their challenges while also looking at the development of potential solutions	In-progress	Residual impact 3-Moderate
Category Operational/program design/delivery	Climate vulnerability Without climate adaptation plans, heritage assets are exposed to environmental degradation	A continuing, dedicated focus on revenues and expenses within the Trust's annual budget		Residual likelihood 3-Possibly
Age of risk Q2-2025-26	Inconsistent conservation planning			Residual risk (Total risk rating/score)
Timeframe to manage down Ongoing	Gaps in conservation management plans and condition reports reduce strategic oversight			9-Medium
Speed of onset Consistent	Cost escalation Rising costs for capital investment, maintenance and staffing may outpace available funding			

Provincial agency: Ontario Heritage Trust

Key information	Risk description	Risk management plan	Status of management plan	Risk rating/score
Risk title Monitoring and asset management risks	Incomplete or inconsistent data Missing or fragmented condition audits, utilization tracking and documentation all impair decision-making	The Trust is focused on developing a robust system that uses digital monitoring tools with complete data sets and standardized reporting practices	In progress	Residual impact 3-Moderate
Category Operational/program design/delivery	Lack of standardization Inconsistent reporting and asset tracking across properties creates inefficiencies			3-Possibly
Age of risk Q3/2025-26	Technology lag Delayed implementation of digital monitoring tools and centralized systems limit oversight and responsiveness			Residual risk (Total risk rating/score) 9-Medium
Timeframe to manage down Ongoing				
Speed of onset Consistent				

Provincial agency: Ontario Heritage Trust

Key information	Risk description	Risk management plan	Status of management plan	Risk rating/score
<p>Risk title</p> <p>Use optimization and financial sustainability risks</p>	<p>Underused properties Without a strategic property use framework, assets may remain inactive or misaligned with public benefit goals</p>	<p>Work with the Ministry to explore options to ensure sustainable access to capital funding (for example, extension of MOU, alternative arrangements to access capital funds)</p>	<p>In progress</p>	<p>Residual impact</p> <p>4-Major</p>
<p>Category</p> <p>Operational/financial</p>	<p>Revenue volatility Reliance on rentals, events and donations — especially with lost income from key sites — creates financial instability</p>			<p>Residual likelihood</p> <p>4-Likely</p>
<p>Age of risk</p> <p>Q3/2025-26</p>	<p>Changes in revenue Lack of new revenue streams (for example, naming rights or digital products) threatens long-term sustainability</p>			<p>Residual risk (Total risk rating/score)</p> <p>16-Medium-High</p>
<p>Timeframe to manage down</p> <p>Ongoing</p>	<p>Pricing misalignment Outdated rental and lease rates may not reflect market conditions, limiting revenue potential</p>			
<p>Speed of onset</p> <p>Consistent</p>				

Provincial agency: Ontario Heritage Trust

Key information	Risk description	Risk management plan	Status of management plan	Risk rating/score
Risk title Accessibility and client experience risks	Physical accessibility gaps Inadequate amenities (for example, parking, elevators or washrooms) may exclude visitors and violate AODA standards	The Trust is focused on reviewing amenities at its properties, including improvements related to the visitor and client experiences	In progress	Residual impact 3-Moderate
Category Operational/program design/delivery	Visitor satisfaction Poor amenities and inconsistent experiences across sites may reduce engagement and repeat visitation			Residual likelihood 3-Possibly
Age of risk New	Digital access and services Without improved digital platforms and client services, the Trust may struggle to meet modern expectations			Residual risk (Total risk rating/score) 9-Medium
Timeframe to manage down Ongoing				
Speed of onset Consistent				

Provincial agency: Ontario Heritage Trust				
Key information	Risk description	Risk management plan	Status of management plan	Risk rating/score
Risk title Public engagement and interpretation risks	Lack of cohesive storytelling Absence of a Trust-wide interpretation strategy and storytelling timeline weakens program coherence Representation gaps Failure to reflect Ontario's diversity (for example, Indigenous, racialized or veteran communities) risks alienating key audiences Low visibility Weak branding, outdated digital assets, and limited outreach reduce public awareness and engagement	The Trust is developing an interpretation strategy focused on celebrating Ontario's diversity Trust branding and public outreach efforts focused on strengthening the brand through social media will increase public outreach opportunities	In progress	Residual impact 3-Moderate
Category Operational/program design/delivery				Residual likelihood 3-Possibly
Age of risk New				Residual risk (Total risk rating/score) 9-Medium
Timeframe to manage down Ongoing				
Speed of onset Consistent				

Provincial agency: Ontario Heritage Trust				
Key information	Risk description	Risk management plan	Status of management plan	Risk rating/score
Risk title Commemoration and community support risks	Provincial Plaque Program challenges Outdated policies and funding structures hinder recognition efforts and responsiveness	The Trust will review its policies regarding the Provincial Plaque Program and look at ways to improve funding access to the program	In progress	Residual impact 3-Moderate
Category Operational/program design/delivery	Community disconnect Inactive relationships with past DOO participants and underserved communities reduce reach and relevance	Efforts continue to strengthen partnerships with businesses and communities across Ontario		Residual likelihood 3-Possibly
Age of risk New	Limited capacity building Without strong partnerships and support tools, local heritage initiatives may struggle to survive			Residual risk (Total risk rating/score) 9-Medium
Timeframe to manage down Ongoing				
Speed of onset Consistent				

Provincial agency: Ontario Heritage Trust				
Key information	Risk description	Risk management plan	Status of management plan	Risk rating/score
Risk title Sector leadership and innovation risks	Research and knowledge gaps Weak academic partnerships and limited data-sharing may prevent the Trust from leading in heritage policy and practice	The Trust is working to develop stronger academic partnerships The Trust is also looking for opportunities to seek and provide access to relevant heritage data	In progress	Residual impact 3-Moderate
Category Operational/program design/delivery				Residual likelihood 3-Possibly
Age of risk New				Residual risk (Total risk rating/score) 9-Medium
Timeframe to manage down Ongoing				
Speed of onset Consistent				