



# **BUSINESS PLAN**

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**Approved by the Board of Directors, December 14, 2022**

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## EXECUTIVE SUMMARY

The Ontario Heritage Trust (OHT or the Trust) is a Commission public body, property owner, steward, lessor, business operator, attractions operator, conservation partner and sector leader. We are an enterprise agency with a proven business model and a diversified revenue base. The Trust is efficient and effective in its operations, providing value for money to taxpayers.

The government has identified the following as key priorities for the Trust for 2023-24:

- Foster sustainable economic growth while actively supporting the government's antiracism and inclusion initiatives to build an equitable Ontario and promote a sense of belonging through informed policies, programs and services;
- Conserve, interpret and share Ontario's heritage and rich history;
- Collaborate with other agencies, ministry partners, stakeholders and communities to drive efficient innovation across all lines of business, with particular attention given to sharing the Trust's success stories with Ontarians.

The Business Plan for 2023-24 articulates how the Trust will fulfill its mission and mandate and advance the priorities of the Ministry of Citizenship and Multiculturalism. Our activities build upon the success of past years with a future-focused approach that:

- *Builds an equitable Ontario and promotes a sense of belonging.*
- *Fosters sustainable economic growth while actively supporting the government's anti-racism and inclusion initiatives.*
- Supports a resilient cultural fabric that reflects the diversity and strength of Ontario's communities.
- Modernizes delivery of the mandate with new operating models, digital delivery options, innovative collaborations and community partnerships.
- Contributes to the continued recovery of the tourism, heritage and live theatre sectors.
- Contributes to the Trust's business lines.

### **Background**

The Trust continues to build upon 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 have been, and are, noteworthy. We are an agency that is: focused and accountable; continually and successfully diversifying its revenue base; respected for annually balancing its budget since 2016; following a proven and demonstrable plan for long-term sustainability.

By leveraging funds we receive from the Province of Ontario, the Trust has earned, on average, 65% of its yearly gross revenues. We work in 85% 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.

Despite the ongoing challenges of COVID-19, the Trust has continued to deliver significant results for the people of Ontario. We successfully re-focused attention on designing well-received online public experiences, including our popular Doors Open

Ontario program and activities for educators and students. Concurrently, our team also worked to ensure the safety and security of the public, our properties and extensive collections, and to support our partners across the province.

While the impact of COVID-19 has been difficult and far-reaching, the broad reach of our programming and partnerships across the province has uniquely positioned the Trust to lead and support the economic and cultural recovery of the culture and heritage sectors moving into 2023-24. We are leading by example, showcasing and role-modelling innovative business approaches. We can contribute further by providing spaces and opportunities for our partners to continue to function and grow moving forward through the pandemic recovery period.

Our results to date in 2022-23 demonstrate continuing popular interest in our sites and activities, the resilience of our business models and the sustainability of our programs:

- Public participation in sites and programs of 265,000 people.
- Virtual event attendance of 267,000 people.
- Venue rentals and film location services are set to exceed their targets at OHT properties.
- 460,000 in website visits.
- A social media fanbase of 28,732.
- Over 27,500,000 social media impressions.

#### **Continued recovery and rebuilding: 2023-24**

The Trust will continue to support the sustainability of the sectors with which we work and strive towards the full economic recovery of Ontario. We work in partnership with commercial and not-for-profit organizations, tenants, sponsors and donors whose viability and recovery will be critical to our success.

The Business Plan anticipates a flat-lined government operating allocation of \$3,809,300 with the Trust raising the balance of the budget through its various business enterprises and fundraising activities.

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

Looking ahead, our business model remains a solid foundation to build on.

We will continue to identify new revenue-generating opportunities to support our core mandate. With continued government guidance, the Trust will serve as a leader in growing the economy while strengthening consumer confidence in engaging with the rich resources of Ontario's heritage. We will inspire a powerful sense of community and continue to serve all the people of Ontario, contributing to the health and well-being of Ontarians and our communities.

## **STRATEGIC DIRECTION (2020-2023)**

### **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 of its importance in our society. [Ontario Heritage Act, R.S.O.1990].

### **OUR VISION**

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 and foster 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 planned business operations for FY2023-24 will continue to be impacted by COVID-19.
- Moving into 2023-24, and the “new normal”, the Trust needs to find the balance between in-person offerings and continuing digital programming access. Digital offerings allow us to expand our outreach beyond our physical site locations. This is a huge benefit as many sites are in remote regions of the province.
- As many groups struggle to recover post-pandemic, the Trust has a role to play in supporting smaller not-for-profit organizations, particularly those representing BIPOC and LGBTQ2+ communities and Indigenous groups.
- Although the need to prioritize the return of in-person programming remains a priority, digital communication is a key programming development which emerged as an adaptation to the exigencies of the pandemic and is not likely to disappear.
- The Trust has opportunities to align educational and programmatic offerings to course curricula, expanding the opportunities for sharing and engagement.
- Developing and evolving digital programming towards emphasizing various forms of interactivity may be the key to engaging the younger audiences the Trust needs to maintain the social relevance of building and preserving our heritage.
- The Trust’s capacity to attract younger audiences via digital programming relies in part on our ability to identify, segment and engage current key audiences by enhancing our brand identity and recognition. In the digital/online environment search engine optimization (SEO) is crucial for enhancing organizational reputation and success in brand definition.
- The Trust needs to make the necessary investments in deploying the technological tools required (Google Analytics, for example) to precisely identify audiences and build brand recognition.
- The anticipated and continued reduction in available student work programs and grants in 2023 will reduce the number of students available to deliver the Trust’s public programming and conduct essential public programming and field work in summer 2023.
- The Trust continues to receive fewer individual donations, sponsorships and grant funding as the charitable sector struggles in the post-pandemic climate.
- The shrinking of the volunteer sector (as volunteers age and pass away) is driving the need for the Trust to engage with new technologies to meet visitor demand at public sites.

### **External**

- The Trust is working with its sites and programs to return to pre-pandemic levels of participation. Recovery in the tourism and culture sectors has been widely projected (e.g., by MTCS) as not likely to return to 2019 levels until 2024.

- According to Colliers the Downtown vacancy rate as of June 2022 is 9.6% for office occupancy in downtown Toronto.
- Legislative changes in 2020 were impactful, including, the: Planning Act and Provincial Policy Statement, Ontario Heritage Act, Conservation Authorities Act, and endangered species legislation. The Trust's Conservation Authorities partners have been removing themselves from responsibilities related to cultural heritage management since these changes were made, directly impacting many of the Trust's operating partnerships.
- A total of 64% of Toronto nonprofits reported a drop in volunteer hours, in line with the introduction of COVID-19 public health measures, with the average organization reporting an estimated 38% decline in volunteer hours, compared to before the pandemic. (*Vital Signs Report 2021*).
- 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.
- Increased global attention on the rights and stories of Black, Indigenous and People of Colour (BIPOC) populations brings attention to the Trust's work on inclusive, honest, authentic representations of our heritage, providing an opportunity for leadership in the sector. This leadership is seen in the Trust's '*Expanding the Narrative*' work, the new direction of the provincial plaque program, increased focus on organizational diversity and anti-racism efforts.
- Investment income will continue to be impacted by the uncertainty in the market and rising interest rates will likely remain until the end of 2023.
- Even though there has been a shift to online programming, audiences are much less willing to pay for online performances. The *February 2021 Arts Response Tracking Study* found that people spent 68% of their time on arts and culture consumption during the pandemic on free content versus only 13% for paid content.
- 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, free rental spaces, and pressure on its site partnerships.
- There is continuing significant competition for limited philanthropic dollars and corporate sponsorships. Approximately 40% of Canadian charitable donors have shared that their giving has dropped since the pandemic began in March 2020, according to an Angus Reid Institute (ARI) survey.
- More than 70% of fundraising organizations in Canada expect their organization to raise less money than in the year before the pandemic hit – most fundraisers expect to see a continued negative impact.
- According to the Association of Fundraising Professional's first quarter 2022 report, the number of donors in the US decreased by 5.6%, and the donor retention rate, (the percentage of donors who gave in 2021 and then gave again in 2022), decreased by 6.2% year-over-year.
- According to the Ontario Nonprofit Network's 2022 report, *State of the Sector in Uncertain Times*, 74% of organizations reported an increased demand for their services – up from 63% in 2021 and 47% in 2020. 65% are experiencing a recruitment and retention challenge with vacancies going unfilled, and even

volunteerism is at a low, with 62% of organizations reporting that volunteers are not returning.

- 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% from pre-pandemic numbers. A report by Wolf Brown's Audience Outlook Monitor corroborates this, stating that 15-20% of non-returning audience may never return. In Ontario, Wolf Brown's surveys were conducted through the Ontario Arts Council.
- 3/4 of nonprofit organizations reported an increase in expenses in 2022, compared to 55% in 2021. In the GTA, some reported an increase of over 100% year over year (ONN, *State of the Sector in Uncertain Times*).
- A Canadian Public Survey conducted in May 2022 by the National Trust for Canada highlighted several key heritage concerns among Canadians. Sixty-one percent of Canadians are interested in heritage conservation. Of these 85% are likely to visit a heritage site in the next 12 months.
- Younger cohorts of the population are interested in exploring the connection between heritage conservation and climate change.
- Heritage is important to conserving identity; heritage is important to building conservation, building conservation is important to fighting climate change, conserving natural spaces and fighting climate change is important to ensure clean water and air.

## KEY DELIVERABLES

*References to the Minister's 2023-24 Mandate Letter are italicized.*

The Trust's key deliverables follow the five strategic themes that were developed for the 2020-2023 Strategic Plan. Our key deliverables fulfil the following six goals:

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

### Addressing government priorities

- *Provide insight and expertise to the Ministry on reviewing and streamlining the Ontario Heritage Act, its regulations, Standards and Guidelines, and other heritage-related processes.*
  - Where, as part of a provincial disposal process, the province receives proposals to adaptively reuse Provincial Heritage Buildings of Provincial Significance to increase housing supply, share expertise to help expedite managing change while conserving provincially significant heritage on the properties to support the



- Province in meeting its overall housing goals.
  - Provide support to MCM to update the Heritage Toolkit to support communities in identifying, protecting, and conserving key heritage sites in the context of the More Homes Built Faster Plan.
- *Provide insights and expertise to the Ministry regarding implementation of the Government of Ontario's More Homes for Everyone initiative with respect to heritage, specifically with respect to balancing sound heritage conservation practices with the removal of barriers in the development of more housing for more Ontarians.*
  - Undertake additional research and provide information on the Trust's website promoting the effectiveness of adaptive reuse to support housing while conserving heritage and older building stock in our communities.
  - Working with MCM and MMAH, lead a study to identify opportunities for the province to provide financial incentives to designated properties to support adaptive reuse, which could include providing exemptions from development charges, expanding heritage property tax incentives, or implementing programs to provide personal tax incentives.
  - Work with government partners and the easement property owners to identify potential adaptive reuse projects to demonstrate how increasing housing supply can be balanced with conserving key heritage properties.
- *With respect to Red Tape Regulatory Burden Reduction Initiative, bring forward to the ministry specific initiatives for cost-savings and other opportunities for efficiencies; work with the ministry to facilitate projects that seek to reduce burdens on OHT operations, where applicable.*

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

- Align OHT's mandate to deliver on the priorities of the Ministry of Citizenship and Multiculturalism (MCM), specifically with respect to building an equitable Ontario and promoting a sense of belonging for Ontarians.
- Adopt an inclusion engagement process to ensure all voices are heard to inform policies and decision-making.
- Invest in anti-racism programming and work with the Black community and Indigenous communities. Address older provincial plaques that include outdated language and terminology.
- Complete research and consultation on 11 plaques prioritized for replacement and identify further plaques for replacement in future years through community consultations.
- Continue to develop website materials for 11 priority topics to provide historical summaries, context regarding the place of these subjects in the context of public history and facilitate the sharing of various perspectives.
- Showcase heritage as an investment in the province's communities and cultural expression.
- Leverage OHT programs, services and spaces to support the continued recovery of the tourism, heritage and live theatre sectors.
- Continue to showcase the EWG as a cultural hub and vital venue for live performance in the city and province.
- Provide leadership in the areas of archaeology, 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 strategically, helping to stabilize the Trust's operating partnerships and to ensure their viability in the long term.
- Build and maintain relationships with Indigenous communities to support the protection and celebration of Indigenous heritage and promote understanding among all Ontarians.
- Support the government's commitment to protect and commemorate Residential School burial areas in Ontario; design and develop, through an Indigenous-led process, appropriate commemoration(s). Work with Ministry of Indigenous Affairs (IAO), MCM and other ministries as appropriate to support IAO's work with the Indigenous Leadership Forum on the Residential School burial areas and define the role OHT might play in the work as it proceeds.
- Demonstrate the Trust's leadership role as a centre for heritage information and expertise; provide online tools, contribute to conferences and workshops, collaborate with partner agencies on delivery of government priorities.

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

- Actively conserve and steward lands, cultural landscapes and cultural resources.
- Demonstrate an ongoing commitment to investing in conservation.
- Continue implementation of phase one of the Strategic Acquisition Plan including research related to BIPOC heritage, women's history, and LGBTQ2+ 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.
- Implement natural heritage priority projects to ensure conservation of the Ellis property, the Devil's Monument and Cheltenham Badlands.
- Continue expansion of technological solutions to asset management systems, including the continued development the Online Public Access Catalogue (OPAC) for archeological and cultural collections and the expanded use of GIS to meet property information requirements,
- Conserve, manage and present the Trust's cultural and archaeological collections and holdings. Develop a long-term collections storage plan.
- Deliver the capital program through strategic capital investments that ensure conservation, address public health & safety, and support commercial viability and sustainability.
- Utilize new models for property stewardship and make strategic investments to stabilize stewardship and operating partnerships.
- Implement approved plan to address issues related to the management of Trust properties with Conservation Authorities.
- Continue to work with Indigenous communities for the protection of sacred lands and culturally significant places, including Nochemowenaing, Moose Factory, and Cahiague.

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

- Focus on bringing people back to in-person events, commemorations, as well as visiting and honoring heritage sites.
- Ensure Doors Open Ontario is presented as a key program of the Trust's work as an agency of the government.
- Encourage further engagement and participation by faith-based organizations and other places of worship.
- Continue to expand and enhance Doors Open Ontario to educate the public on the province's heritage and promote local tourism and engage all Ontarians in the work and promotion of heritage conservation.
- Expand digital programming to engage new audiences, showcase multicultural content, 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.
- Work with the Moose Cree Nation on renewed interpretation and conservation of sites on Moose Factory Island for the 'More Than 350' celebration.
- Host 'Heritage Matters Live' presentations.
- Utilize the Trust's geographically diverse sites, respected programs, informational websites, and impactful social media channels to deliver the interpretive theme Food for 2023.
- Continue to modernize museums and public sites with self-guided tour opportunities, based on the 2022 pilot program.
- Support mentoring, youth employment and partnerships with educational institutions.
- Continue the Harvey McCue (Waubageshig) Internship for Indigenous Youth; continue promotion and fundraising to support the program.
- Building on work done in 2022-23, commemorate the gravesite of former Premier William Davis in cooperation with the family, the cemetery board and other appropriate stakeholders.

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

- Enhance existing partnerships, and build new ones, to invest in community conservation.
- Collaborate with other agencies, ministry partners, stakeholders and communities to drive efficient innovation across all lines of business, with particular attention given to sharing success stories with Ontarians.
- Showcase the uniqueness and diversity of the province's tangible and intangible heritage through inclusive, authentic and innovative programming.
- Administer the Lieutenant Governor's Ontario Heritage Awards, prestigious awards that recognize 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.
- Welcome returning audiences to the EWG and engage with them through diverse, artistic offerings and varied programming.
- 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.
- Safely showcase the Ontario Heritage Trust's unique and rich heritage assets to visitors.
- Building on the Case-for-support work done in 2022, engage new sponsors and donors in the work of the Trust.
- Secure sponsorship support for the EWG; the Doris McCarthy Artist-in-Residence Program; Doors Open Ontario; the Youth Strategy; the annual conservation presentation; and the Cheltenham Badlands.

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

- Demonstrate high standards and best practices of good governance, transparency and accountability.
- Act in the best interests of Ontarians by being efficient, effective, and providing value for money to taxpayers. This includes the areas of competitiveness, sustainability and expenditure management; transparency and accountability; risk management; workforce management; diversity and inclusion; data collection; digital delivery and customer service. Meet the requirements of the Accessibility for Ontarians with Disabilities Act (AODA).
- Identify and pursue/expand opportunities for fundraising and revenue generation through partnerships for longer-term sustainability.
- Cultivate innovative opportunities that address post-pandemic pressures, such as the sustainability of site partnerships and the creation of new operating models for Trust properties.
- Broaden the revenue base through all channels; identify and implement strategies to reduce the deficit through the pandemic recovery periods.
- Align and maximize resources to deliver the best outcomes.
- Build back towards the previous level of 65% self-generated revenue through business development, heritage venues and film, leases, grants, sponsorships, and donations.
- Develop and implement a robust strategy for corporate sponsorship, philanthropic foundations and individual giving; leverage the important role of the Board of Directors in supporting fundraising.
- Invest in post-pandemic business development opportunities, including opportunities at the EWG and leased properties.
- Showcase the EWG venues through unique, high-caliber programming and varied user groups from across the province and around the globe.
- Diversify offerings at the EWG to support new user groups and attract audiences that reflect all Ontarians.

In addition to our strategic themes, the Trust will deliver on the following goals:

### **Accountability and reporting:**

The Chair and Board fulfill their respective leadership roles in actively overseeing the development and implementation of OHT policies and decisions that are consistent with government of Ontario goals and priorities.

OHT's goals, objectives and strategic direction continue to align with the government's priorities and direction.

- Support the agency's AAD mandate review, scheduled in 2023-24.
- Develop and implement OHT policies and decisions that are consistent with the Government of Ontario's goals and priorities.
- Develop and implement an effective process for identifying, assessing, and mitigating agency risks including, but not limited to, COVID-19 impacts.
- Increase data sharing with Supply Ontario, when applicable, regarding procurement spending and planning, contract arrangements and vendor relations to support data-driven decision-making.

As the MOU is being updated, the ministry and OHT shall affirm the existing MOU by April 28, 2023.

## **OHT PLANNING: Meeting critical business needs 2023-24**

As the Trust works to fulfil its mission in the post-pandemic business climate, several projects that are critical to support the stability of operating partnerships, create new business opportunities, and support the conservation and commemoration of OHT sites have been identified. In October 2021, the Trust signed an OHT-MTCS Use of Funds Agreement. The Agreement identified funds to support:

- post-pandemic sustainability of partnerships;
- new operating models for Trust properties; and
- modernization, conservation, and interpretation projects.

The Trust allocated funds available under the Use of Funds Agreement to support projects that began 2022-23 and will be carried forward to 2023-24, as well as several projects to be initiated in 2023-24. These projects and their costs are outlined as follows:

### **Projects carried forward**

#### **Phase 3 Geographical Information System (GIS) implementation**

The third phase of GIS mapping will fully implement GIS into OHT land management activities and make Trust data publicly available on the OHT website. Cost: \$40,000.

#### **Digitization of programming**

Delivery of interpretation at Fulford Place will be modernized by implementing self-guided and digitally enhanced tours. Cost: \$23,500.

#### **Priority capital projects**

Several capital projects focused on code compliance (e.g., accessibility) and improvements necessary for adaptive reuse or modernization of building systems and infrastructure have been identified. These include Inge Va (\$250,000), Centennial Park buildings in Moose Factory (\$500,000), Rockwood (\$500,000), preventative maintenance on Eastern Ontario sites (\$100,000) and building envelope and base building system repairs at various sites (\$400,000). These capital projects were not approved for funding under the Capital Repair & Rehabilitation Program, which has a limited budget." **Total cost: \$1.95M**

## **2023-24 projects**

### **Website redevelopment**

The Trust's website will be updated and refreshed to promote critical program and business activities. Cost \$200,000.

### **Fulford Place drawing room exhibit upgrades**

Upgrades to Fulford Room's drawing room will enhance the visitor experience and support interpretation. The Friends of Fulford Place Association will fundraise to provide \$20,000 of the total cost. This work completes the capital restoration of the room which began in 2022-23. Cost \$36,500.

### **Digital programming**

Special Black History Month programming and virtual school tours will be delivered in 2023-24 at a cost of \$15,000.

### **Outdated and problematic plaques**

Up to \$125,000 in 2023-24 to complete new research papers for five plaques prioritized for replacement.

Up to \$175,000 for staff support to implement this work. Total cost: \$300,000

### **Residential schools**

Depending on how the program unfolds being led by other parts of government in consultation with Indigenous leaders the Trust proposes to expend up to \$500,000.

### **Phase 2: Strategic Acquisition Plan**

Building on the accomplishments of Phase 1 of OHT's Strategic Acquisition Plan, Phase 2 will explore the acquisition of surplus properties currently held by Infrastructure Ontario to be managed by the Trust in support of working in partnership with Indigenous communities to protect Indigenous lands.

Estimated total cost: \$485,000.

### **COVID-19 stabilization**

The Trust anticipates drawing \$2.05M from the OHT-MTCS Use of Funds Agreement for post-pandemic stabilization.

### **Lost revenue**

The Trust anticipates drawing \$1.1M from the OHT-MTCS Use of Funds Agreement for lost revenue from the termination of the lease at 265 Front Street East.

## **OVERVIEW OF PROGRAMS AND ACTIVITIES**

### **Overview**

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 collaborates with partners in urban, rural, and remote communities throughout Ontario. The Trust conducts programs and activities which are accessible to

approximately 85% of Ontario municipalities and 99% of the people in Ontario directly in their communities. The Trust works to ensure that its programs are aligned with its strategic direction and mandate, and that programs are accessible, equitable, integrated and provide good value for money.

Trust programming effectively promotes reconciliation, diversity, inclusion and equity. It responds to Truth and Reconciliation Commission recommendations, promotes understanding of cultural identity, builds a sense of belonging in communities, boosts civic pride and volunteerism, contributes to local economies, supports tourism, supports educational and anti-racism activities, and builds engagement in celebrating and promoting heritage.

### **Recent reviews**

In recent years, the Trust has reviewed its programs and properties, to better understand the diversity of its holdings, ensure appropriate representation, appreciate the portfolio's strengths, identify any gaps in our work, and achieve a holistic view of Ontario's heritage.

We are currently focused on re-defining the narrative to ensure that the heritage we protect and the stories we tell 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.

The Trust strives to achieve equity in all aspects of our work including storytelling, commemoration, land protection and stewardship. This value is concretely reflected in the variety of activities we support and the creativity with which we approach initiatives in business and community partnerships, storytelling, land protection, public programming, digital programming, and educational activities.

## **NEW AND EMERGING**

### **Expanding the narrative**

The Trust has developed policy, over the years, to ensure 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.

Over the past several years, the Trust has made concerted efforts to share stories of all Ontario's peoples – providing a forum to look back at the people who have called this province home for more than 10,000 years. The Trust continues to re-define the narrative to ensure that the heritage we protect and the stories we tell are respectful, accurate and authentic portrayals of the peoples who have lived on and contributed to the place we all call Ontario.

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, Heritage Matter Live, educational programs and museum exhibits, and digital programming.

### **Strategic conservation and protection**

The Trust is empowered through its legislated mandate to hold property of heritage value on behalf of the people of Ontario. 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. Those priorities include:

- Protecting Indigenous lands in partnership with Indigenous communities.
- Equity and diversity in representation such as protecting heritage sites of significance to the Black and racialized communities, significant heritage sites associated with women's history, and sites that reflect the socio-economic vitality of the province.
- Natural spaces and trails such as rare natural vegetation communities or habitats (e.g. savannas and lands that support species at risk) and strategic green links that connect existing conservation lands and create corridors and areas that support habitat, and
- Properties that support the operational and strategic needs of the Trust.

The Strategic Acquisition 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.

## **CONSERVATION AND STEWARDSHIP**

### **Properties and partnerships**

Under the Ontario Heritage Act, R.S.O. 1990, the Trust is mandated to conserve properties of historical, architectural, archaeological, recreational, aesthetic, natural and scenic interest for the benefit of the people of Ontario.

The Trust's portfolio of natural and cultural properties consists of 204 owned properties and 295 easement properties, including 185 registered archaeological sites.

The Trust protects Ontario's provincially significant heritage places holistically. 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 Conservation Approach is designed to reflect the complex layering of history and the ways it is represented in our communities. The strategy recognizes and supports the intersection and interplay of all forms of heritage. Drawing from the Objects of the Trust set out in the Ontario Heritage Act, it seeks "to preserve, maintain, reconstruct,



restore and manage property of historical, architectural, archaeological, recreational, esthetic, natural and scenic interest.”

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% 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.

### Cultural Heritage Properties

The Trust owns 26 cultural heritage properties. It also protects a further 198 cultural heritage properties through conservation easements.

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 like 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% of the Trust’s properties are managed along with partners or leased. 91.2% of leasable space is leased. Operating models include business uses, adaptive reuse, commercial and residential leases, stewardship agreements with partner organizations, venues for film, conferences and meetings.

### Adaptive reuse

Adaptive reuse refers to the process of reusing existing structures and adapting them for new purposes through renovations and expansions. This repurposing of existing building stock is internationally recognized as an effective approach to integrating development and conservation goals. The Trust will undertake additional research and make that information available to the public on our website and through social media programming as part of our ongoing effort to promote the effectiveness of adaptive reuse in supporting housing while conserving heritage and older building stock in our communities.

### Natural heritage properties

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

The Trust owns 178 natural heritage properties and a further 97 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 our natural heritage properties also contain provincially significant archaeological sites.

The Trust works with its partners to enhance visitor experience and improve protection of natural heritage whenever possible. Currently, the Trust is leading a multi-year project with a range of partners to make necessary trail improvements, install interpretive signage, enact important erosion control measures and undertake much-needed habitat restoration at the Ellis property in the village of Jordan.

At the Devil's Monument properties on the Bruce Peninsula, the Trust is working with the Bruce Trail Conservancy to upgrade parking and certain aspects of the trail system, including new viewing platforms, that will give visitors improved viewpoints of the unique natural features while better protecting the features from damage.

At Cheltenham Badlands, the Trust works with Credit Valley Conservation to conserve the badlands' natural heritage features and provide visitor access. Site enhancements to support conservation and visitation are planned under a multi-year Master Plan.

#### Impact of changes to Conservation Authorities Act

Following substantial changes to the Conservation Authorities Act (CA 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.

A new model for the management of the Trust's conservation lands is required — a new operational model which blends fee-based agreements between Conservation Authorities (CAs) and the Trust with direct operation of properties. Responsibility for repair and maintenance of capital assets and cultural heritage resources by the Trust where necessary.

#### 2023-24 Capital Program

The 2023-24 capital program request totals \$4.1M at various Trust-owned sites, contributing significantly to the pandemic economy, and supporting tourism and revenue-generating sites across Ontario.

#### Conservation Easements – 295 easement properties in 121 municipalities

The Trust holds conservation easements on 198 cultural heritage sites and 97 natural heritage properties in 121 municipalities across the province. An easement is a legal agreement between the heritage 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.

#### Strengthening community conservation

The Trust is recognized for its expertise in conservation. It assists communities and community organizations by providing education and technical advice on the conservation of Ontario's heritage, building local awareness and capacity for heritage planning, promoting a cultural landscape approach to conservation, 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 one of the Trust's many conservation tools designed to strengthen community conservation. Available online, The OHA Register—among its many purposes—serves as a public database of all properties designated under the Ontario Heritage Act.

Other OHT conservation tools available online include the Places of Worship Inventory, the Plaque Database, and the Collections Database of archeological artifacts.

#### Workshops, training and technical advice

The Trust provides technical advice, assistance and best-practice models of conservation, interpretation and adaptive reuse to strengthen community capacity for conservation.

- Trust staff regularly support professional conferences with planning assistance and as speakers. These include the: National Trust of Canada, conference, Ontario Heritage Conference; Ontario Land Trust Alliance; Latornell Conservation Conference; the Willowbank School of Restoration Arts; the Ontario Archaeological Society; the Canadian Association of Heritage Professionals; the Ontario Association of Architects; and many others.

## **PUBLIC EDUCATION**

#### Program partners

The Trust engages with an extensive 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. Typically, the Trust engages 35 to 45 Doors Open Ontario event partners each year.

#### 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 events are held on weekends between April and October, 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 among a range of community partners and attracts visitors to unique cultural tourism experiences that:

- Generates partnerships between arts, culture, and heritage organizations
- Creates a positive sense of community and belonging
- Enriches a culture of heritage volunteerism
- Stimulates interest in local heritage that translates into a tangible economic impact in participant communities and supports small businesses.
- Prior to the pandemic, Doors Open Ontario 2019 featured approximately 930 participating sites in 140 communities, within 37 events. The program annually generates over \$11M in revenues for local communities. Doors Open Ontario 2019 attendance is estimated to be over 465,000.

The Trust responded to the pandemic by shifting to a digital format. The digital Doors Open Ontario program showcased 284 sites in communities across Ontario, providing access to heritage culture remotely. With the exclusion of agencies from some government grant programs, the Trust will likely have to re-examine its funding model for this program.

With the return of in-person events this year, Doors Open Ontario saw strong results with 21 in-person events and 507 sites, representing each region of Ontario, and at least 265,500 site visits. The economic impact is estimated to be \$5.5 million supporting COVID-19 recovery in vulnerable sectors as well as at least 15k volunteer hours. Visitation per site was close to 2019 benchmarks – which was a record year – showing strong interest in the program. Doors Open Ontario also offers hundreds of online resources and experiences to ensure that the province’s heritage is freely discoverable to anyone with an internet connection, regardless of any other barriers to access. Current YTD total web visitation: 267,070 (already 27% up over last fiscal with four months yet to report), 73 media stories, 237k social media engagement, and 27M social media impressions.

For 2023-24 the Trust will ensure Doors Open Ontario is presented as a key program of the Trust’s work as an agency of the government and encourage further engagement and participation by faith-based organizations and other places of worship.

#### *Interpretation and public programming plan*

The Trust provides a coordinated and cohesive program of interpretation shaped through ongoing creative and strategic planning. The Interpretive Plan 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 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 a balanced, inclusive and objective narrative on Ontario’s heritage is presented to the public.

In recent years, the Trust has designed and delivered several initiatives through the publication of Heritage Matters, the Heritage Matters Live presentations and other channels that explore Ontario’s diverse cultural heritage:

- International Year for People of African Descent (2011)
- 50th Anniversary of the Ontario Human Rights Code (2012)
- Ontario’s Artistic and Theatrical Heritage (2013)
- Ontario’s Sport Heritage (2015)
- 400 Years of French Presence in Ontario (2015-2016)
- Medical Science and Innovation (2016)
- Ontario 150 — MyOntario — A vision over time (2017)
- Women’s Suffrage (2018)
- Communication (2019)
- Celebrating Community (2020)
- The Environment (2021)
- Design (2022)

### Interpretive plan

The Trust's Interpretive Plan provides a framework for creating annual interpretive themes for significant commemorations. These themes serve as guides to shape existing programming and special initiatives for upcoming years. In 2023, the Trust's interpretive theme is Food – the heritage of food production, farming, community gardening and local markets. A variety of programs, events and commemorations will be designed and presented to reflect this focus.

### 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 perhaps 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 the plaques needs to be revised to reflect new understandings emerging from the larger ongoing cultural conversation on various subjects raised on the plaques when they were originally inscribed.

Recently replaced and updated plaques:

- On National Day for Truth and Reconciliation 2022, the Trust, in partnership with the Children of Shingwauk Alumni Association (CSAA) and Algoma University, unveiled a new provincial plaque commemorating the former Shingwauk Indian Residential School in Sault Ste. Marie. The new plaque replaces an outdated 1977 version that excluded facts about the true purpose of the residential school and misrepresented the experiences of students. Historian Skylee-Storm Hogan, in consultation with Survivors of the school, was engaged to research and expand on the history of the institution to provide an authentic and honest account of its impact and legacy. The Trust also worked with the Children of Shingwauk Alumni Association and the Shingwauk Residential Schools Centre at Algoma University to review the new plaque text and its translations to Anishinaabemowin and Swampy Cree.
- The Ontario Heritage Trust unveiled four updated provincial plaques commemorating four significant communities and events from Southwestern Ontario and Niagara Region's Black history. The plaques honour the resilience and perseverance of Black communities in the face of hardship and celebrate the success of Black settlers and freedom seekers who have contributed to the fabric of the province. The original plaques were created between 1957 and 1966 and reflected the biases and terminology of the time. The Trust engaged prominent historians Natasha Henry and Adrienne Shadd to develop new research and provide a more comprehensive interpretation of the historical events.

### Attractions

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 Josiah Henson Museum in Dresden the Trust interprets the history of racism and slavery and the struggle against racism and slavery in Ontario. The Trust has a strong commitment to Black history and anti-racism education. At 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 magazine *Heritage Matters*, the *Slavery to Freedom* web resource, events and social media. 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.

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 twentieth 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.

### Heritage Matters Live

The Trust's annual *Heritage Matters Live* presentation provides a forum for dialogue about the places and stories Ontarians value today. Each year, we invite a thought leader to discuss how heritage value is incorporated into their work. This engages the public in recognizing heritage issues facing Ontario today, and inspires individuals to protect the stories and places that shape our cultures and our communities. The event is supported through ticket sales and sponsorships.

### Lieutenant Governor's Ontario Heritage Awards

The Lieutenant Governor's Ontario Heritage Awards program, administered by the Trust, recognizes exceptional contributions to heritage conservation, environmental sustainability, 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, Community Leadership and Excellence in Conservation. The program celebrates individuals and exceptional projects from communities across Ontario.

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

In September 2014, the Trust launched the Doris McCarthy Artist-in-Residence Program at Fool's Paradise (Toronto), the former home and studio of Canadian artist Doris McCarthy. The program offers short-term residences to professional visual artists, musicians and writers. Applications are reviewed by an expert advisory panel; selected artists live at Fool's Paradise while working in their creative disciplines. Sponsored by the RBC Foundation, the program attracts nationally and internationally renowned artists and garners significant media coverage.

### *Digital programming*

The Trust is using technology to transform how we connect with our audiences and create value in programs such as Doors Open Ontario and Trust museums, by creating and developing a digital environment. The Trust has made great strides in providing digital access and sharing digital programming to the public, improving access to our sites for people across the province, especially in rural and remote communities.

### *Heritage Matters*

*Heritage Matters* is the Trust's flagship publication. Each issue of *Heritage Matters* tells Ontario's stories – with articles about conservation efforts and partnerships, as well as articles about our shared past. Issues are designed to provide diverse perspectives and are themed in alignment with the interpretive plan and conservation objectives. In 2019, *Heritage Matters* moved to a digital-only format and *Heritage Matters...more* was added as a monthly e-newsletter.

### *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:

- Toronto Metropolitan University's Planning Program
- Fleming College
- Algonquin College
- University of Toronto-Mississauga
- Willowbank School of Restoration Arts
- York University
- Queens Conservation Program

- University of Toronto
- University of Western Ontario

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

Since 2000, the Trust has worked with communities and schools to celebrate young volunteers' heritage activities. The Trust's Young Heritage Leaders program supports youth achievement in preserving, protecting, and promoting local heritage.

## **BUSINESS DEVELOPMENT AND REVENUE GENERATION**

### Leases, rentals and license agreements

The Trust has 39 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 East for a period of 10 years. This represents approximately 18% of the total general fund (GF) revenue derived from leases. General fund revenues support the Trust's key operations and initiatives.

### 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. Further, Trust sites, particularly those in or around the Toronto area (Ontario Heritage Centre, Enoch Turner Schoolhouse, Elgin and Winter Garden Theatre Centre and Scottsdale Farm), have successfully attracted filming activity. With approximately 6% of total revenue contribution, filming supports core programs and conservation activities.

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

The EWG is a prime example of OHT'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.
- Undertake sensitive adaptations to ensure continued use as safe, viable and sustainable contemporary theatres, while protecting the heritage value.



The EWG hosts a broad range of live performances spanning theatre, dance 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.

In 2022, the EWG focused 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, 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.

#### Fund development (Sponsorship and Fundraising)

The Trust raises funds to support its core mandate from individual donors, corporate sponsors, foundations, and grants.

#### Goals:

- To raise \$878K in 2023-24 by implementing a balanced, multi-tiered fundraising plan and securing diverse streams of funding from the public and private sectors in support of the Trust's mission. This is reflected in the budget as revenue from federal grants, provincial grants and fundraising.
- Meet or exceed GF revenue of \$118K; contribute to self-generated revenues that cover 65% of Trust operating costs.
- Negotiate multi-year funding agreements with sponsors and donors.

#### Objectives:

- Increase the number of individual donors and funding partners, building support for key Trust priorities.
- Expand support from corporate sponsors, philanthropic foundations, and individual donors.
- Build donor loyalty strategically by stewarding Trust supporters and partners, through timely reporting, regular communication, recognition and strategic leveraging of Trust events and programs.
- Support the Trust's brand and public profile; and
- Leverage the important role of the Board of Directors in supporting fundraising and work towards 100% Board giving to the Trust.

#### To meet these objectives, the Trust will:

- Examine opportunities to secure external funding to support three of its programs that may appeal to corporate sponsors as naming rights.
- Focus campaigns on individual donors, personal giving and major gifts.
- Expand contacts through networks identified by members of the Board of Directors.
- Continue to expand the stewardship of individual donors.
- Continue to secure sponsorships and grants for our programs and projects.

- Renew existing grants and create a pipeline of potential new grant connections.
- Leverage expert advice provided in the Case for Support document to create the consistency of language and voice that captures the relevance of the Trust's work and conveys it to potential donors and sponsors.

The Trust will also use advertising campaigns to raise public awareness and support fundraising initiatives.

## **COLLABORATING FOR CONSERVATION — 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 work 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:

- 39 tenants (including not-for-profit, commercial, and residential leases).
- 178 or about 90% 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).
- 295 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	2021-22 Actuals	2022-23 Targets	2023-24 Targets	Output or Outcome
<b>Social Impacts through Participation and Engagement</b>				
Celebrating Ontario through Total site/program participation	480,125	335,000	400,000	Outcome
In-person overall site/program participation	—	—	350,000	Outcome
Online/digital event attendance/participation	—	—	50,000	Outcome
<b>Doors Open Ontario</b>				
<i>Event attendance (in-person)</i>	—	225,000	350,000	Outcome
<i>Social media impressions</i>	8,950,981	6.0M	9.0M	Outcome
<i>Content engagements (shares, actions taken, etc.)</i>	308,981	100,000	150,000	Outcome
<i>Earned media coverage</i>	—	—	65	Outcome
Total website visits	528,126	—	580,000	Outcome
Social media fan base	25,289	28,000	29,400	Outcome
Social media impressions (total)	4,122,522	7.7M	4.25M	Outcome
Social media engagement	66,701	75,000	70,000	Outcome
Youth mentoring hours (OIP, SEP, etc. + unpaid)	1,080	7,000	7,000	Output
Volunteer hours	335	12,750	12,750	Output
Volunteer hours value	\$7,923	\$301,537	\$301,537	Output
<b>Cultural impacts</b>				
% of municipalities with Trust programming	85%	85%	85%	Outcome
Properties (cultural and natural) protected through ownership or easement	483	483	501	Output
Number of partnerships (properties)	—	50	180	Outcome
Number of partnerships (programs and education)	—	95	95	Outcome
Ticketed attendance — Elgin and Winter Garden Theatre Centre	1,060	75,000	90,000	Outcome
Number of performances at EWG	5	120	150	Outcome
EWG occupancy (days); studios, lobbies, venues and filming	247	420	450	Outcome
<b>Economic impact: Sector resilience and recovery</b>				
Self-generated revenue	65% without Parliament transfer	67%	65%	Outcome
Sponsorship/Foundation/Donor/Grant support (\$M)	\$0.615M	\$0.58M	\$0.878M	Outcome
Amount invested in Trust capital (\$M)	\$3.107M	\$3.59M	\$2.0M	Outcome
Revenue from leased space	\$1.66M	\$1.09M	\$1.6M	Outcome

## 2023-24 CAPITAL PROGRAM

The Trust will apply for funding to undertake the following projects in 2023-24:

### Elgin and Winter Garden Theatre (Toronto) — Exterior restoration and repairs

An additional phase of repairs to the building envelope. This includes the stabilization of deteriorated masonry on the historic south wall of the Theatre Centre and repair and recoating of siding on the south wall. **(\$500,000)**

### Rockwood Academy (Rockwood) — Adaptive reuse

The installation of a central heating system, correction of electrical deficiencies, building envelope repairs and site security improvements in the main residential block with rough-in of services extending heating to ancillary wings to support future uses. Site security improvements are also required because the departure of the life tenant makes the site available for new public uses and occupancies. **(\$400,000)**

### Scotsdale Farm (Halton Hills) — Renewal and restoration

Repairs to agricultural outbuildings, barns, road infrastructure and cultural landscape features (such as fences) to forestall ongoing deterioration and allow for new revenue-generating activities. **(\$250,000)**

### Sir Harry Oakes Chateau (Kirkland Lake) — Restoration and repairs

Capital restoration and repairs of deficient building elements including roofing replacement, structural repairs and elevator modernization to address current restrictions to onsite operations and programming. Phase 1 (2022-23) involved engaging a Heritage Consultant to prepare tender package documentation.

Phase 2, procurement and restoration, is planned for 2023-24. **(\$250,000)**

### Duff Baby House (Windsor) — Restoration and repairs

Exterior restoration and repairs to localized building envelope deficiencies including roofing, flashings, wood siding and window assemblies. Replacement of end-of-service-life heating, ventilation and air conditioning equipment is also anticipated. **(\$600,000)**

### Hudson Bay Company Staff House and Centennial Park (Moose Factory) — Building restoration and repairs

Building envelope repairs including fenestrations, roofing and painting at several Trust-owned buildings in Moose Factory. Phase 1 (2022-23) included engaging a Heritage Consultant to prepare tender package documentation (including drawings and specifications) for the repairs. Phase 2 (2023-24) includes procurement, restoration and completion of repairs by a general contractor. **(\$500,000)**

### George Brown House (Toronto) — Exterior restoration and repairs

Exterior restoration and repairs including repairs to the stone foundation, brick masonry walls and chimneys, roofing, metal trim and flashing, rainwater goods, window and door restoration and restoration of perimeter walls. **(\$600,000)**

### Inge-Va (Perth) — Restoration and repairs

Building envelope work. This includes the restoration of fenestrations and rainwater goods, plumbing repairs, and hard- and soft-landscaping maintenance improvements. **(\$150,000)**

McMartin House (Perth) — Restoration and repairs

Capital assessment and repairs to the exterior concrete & steel accessible ramp.  
Miscellaneous site improvements to landscaping and site infrastructure. **(\$100,000)**

Exterior painting and base building repairs (multiple OHT sites)

Painting, building envelope repairs and other pro-active maintenance activities at multiple OHT built heritage sites to reduce recurring major restoration projects. **(\$400,000)**

AODA accessibility upgrades (Dresden, Brockville and Toronto)

AODA upgrades based on recommendations articulated in a 2020-21 AODA Accessibility Upgrade Report to implement accessibility improvements at key publicly accessible OHT buildings including George Brown House, Enoch Turner Schoolhouse, OHC, Fulford Place and UTCHS. This supports government-wide accessibility goals for 2025. **(\$100,000)**

Natural heritage capital repairs and improvements (multiple OHT sites)

Upgrade natural heritage infrastructure across our natural heritage portfolio including trail improvements to provide safer routes for trail users and to improve slope stability and soil erosion impacts. **(\$50,000)**

Cultural/Archaeological collections management (multiple OHT sites)

Investments to support the regulatory, conservation and storage requirements of the Trust's archaeological and cultural collections. **(\$50,000)**

Information technology investments (multiple OHT sites)

Renewal of key information technology infrastructure at multiple OHT sites, including network upgrades and end-of-life infrastructure, and non-supported software applications. **(\$150,000)**

<b>Project name</b>	<b>2023-24 (\$M)</b>	<b>2024-25 (\$M)</b>	<b>2025-26 (\$M)</b>
Elgin and Winter Garden Theatre Exterior restoration and repairs	\$0.50	\$0.50	\$0.50
Rockwood Academy adaptive reuse	\$0.40	\$0.40	\$0.60
Scotsdale Farm building renewal and restoration	\$0.25	\$0.25	\$0.25
Sir Harry Oakes Chateau restoration and repairs	\$0.25	\$0.50	\$0.50
Duff Baby House exterior restoration and repairs	\$0.60	\$0.30	\$0.50
Hudson Bay Company Staff House and Centennial Park building restoration and repairs	\$0.50	\$0.50	\$0.25
George Brown House exterior restoration and repairs	\$0.60	\$0.00	\$0.00
Inge-Va restoration and repairs	\$0.15	\$0.20	\$0.00
Homewood restoration and repairs	\$0.00	\$0.20	\$0.25
McMartin House restoration and repairs	\$0.10	\$0.00	\$0.00
Exterior painting and base building repair (multiple OHT sites)	\$0.40	\$0.40	\$0.40
AODA accessibility upgrades (multiple OHT sites)	\$0.10	\$0.10	\$0.10
Natural heritage repairs and improvements (multiple OHT sites)	\$0.05	\$0.50	\$0.50
Cultural/Archaeological collections management (multiple OHT sites)	\$0.05	\$0.05	\$0.05
Information technology investments (multiple OHT sites)	\$0.15	\$0.10	\$0.10
<b>TOTAL</b>	<b>\$4.10</b>	<b>\$4.00</b>	<b>\$4.00</b>

## 2023-24 BUSINESS PLAN BUDGET

ONTARIO HERITAGE TRUST OPERATING FINANCIALS	2020-21	2021-22	2022-23			2023-24			2024-25	2025-26
	Actual	Actual unaudited	Budget			Forecast			Forecast	Forecast
	COMBINED	COMBINED	GENERAL FUND	RESTRICTED FUNDS	COMBINED	GENERAL FUND	RESTRICTED FUNDS	COMBINED	COMBINED	COMBINED
<b>REVENUE</b>										
MTCS/MCM GRANTS										
MTCS/MCM OPERATING GRANT	3,809,300	3,809,300	3,809,300		3,809,300	3,809,300		3,809,300	3,809,300	3,809,300
MTCS ONE-TIME PANDEMIC STABILIZATION GRANT	5,636,251									
OTHER MTCS GRANTS	2,279,790	2,990,983	19,000	3,520,000	3,539,000	19,000	2,020,000	2,039,000	2,039,000	2,040,000
PROPERTY TRANSFER - METROLINX		54,991,851								
PROVINCIAL GRANTS	524,000	215,000		175,000	175,000		30,000	30,000	30,000	30,000
FEDERAL GRANTS	116,419	69,058	12,000	100,000	112,000	14,000	350,000	364,000	14,000	114,000
NON GOVERNMENT		65,000								
FUNDRAISING, SPONSORSHIPS & PARTNER FUNDING	210,409	254,587	40,000	180,000	220,000	85,000	335,000	420,000	408,000	423,000
DOORS OPEN ONTARIO SPONSORSHIP	150,000			75,000	75,000		127,000	127,000	128,040	129,101
BUSINESS CENTRE'S INCOME	957,466	1,395,651	3,040,592		3,040,592	4,665,900		4,665,900	4,087,218	4,108,962
INVESTMENT INCOME	805,055	1,172,661	260,000	1,155,000	1,415,000	105,000	630,000	735,000	764,400	794,976
MUSEUM ADMISSIONS & GIFT SHOP	983	7,305	64,343		64,343	62,547		62,547	88,000	90,000
OTHER INCOME	4,362	13,162	5,100		5,100	13,266		13,266	13,664	14,074
COVID-19 STABILIZATION			3,100,000		3,100,000	2,050,000		2,050,000		
<b>TOTAL REVENUE</b>	<b>14,494,035</b>	<b>64,984,558</b>	<b>10,350,335</b>	<b>5,205,000</b>	<b>15,555,335</b>	<b>10,824,013</b>	<b>3,492,000</b>	<b>14,316,013</b>	<b>11,381,622</b>	<b>11,553,413</b>
<b>EXPENDITURES</b>										
SALARIES & BENEFITS	5,534,236	5,393,773	6,094,682	335,768	6,430,450	7,279,917	1,140,083	8,420,000	8,554,100	8,637,941
OPERATING & PROGRAM DELIVERY EXPENSES	4,036,452	3,211,294	4,071,462	493,500	4,564,962	3,534,034	1,035,000	4,569,034	4,153,024	4,275,892
DOORS OPEN ONTARIO	186,057	111,052		290,000	290,000		200,000	200,000	225,000	240,000
INVESTMENT IN CONSERVATION				3,000,000	3,000,000		2,908,500	2,908,500	3,750,000	3,750,000
CAPITAL RESTORATION & RENEWAL EXPENSES	2,341,251	3,078,861		3,500,000	3,500,000		2,000,000	2,000,000	2,000,000	2,000,000
RESTORATION EXPENSES - From non-Ministry Allocation		82,812					350,000	350,000		100,000
RESTRICTED FUND EXPENSES	340,962	207,554								
<b>TOTAL EXPENDITURES</b>	<b>12,438,958</b>	<b>12,085,346</b>	<b>10,166,144</b>	<b>7,619,268</b>	<b>17,785,412</b>	<b>10,813,950</b>	<b>7,633,583</b>	<b>18,447,534</b>	<b>18,682,123</b>	<b>19,003,833</b>
<b>Operating Surplus/(Deficit):</b>	<b>2,055,077</b>	<b>52,899,212</b>	<b>184,191</b>	<b>(2,414,268)</b>	<b>(2,230,077)</b>	<b>10,063</b>	<b>(4,141,583)</b>	<b>(4,131,520)</b>	<b>(7,220,501)</b>	<b>(7,450,419)</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

