



Strategic Plan

2025-2030

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Introduction

Mandate and portfolio

The mandate of the Ontario Heritage Trust

Since its inception more than 50 years ago, the Ontario Heritage Trust has acted as the heritage trustee and steward for the people of Ontario. The Trust recognizes that Ontarians have many things in common due to shared geography and a shared past. It is through reflecting on and understanding that shared past that we connect with the people and places around us. To be able to make those connections, we need to look after the spaces in which those events occurred and the objects that have been left behind as a legacy of those stories that have shaped our province.

According to our legislated mandate in the *Ontario Heritage Act*, the Trust:

- holds in trust and manages property for the people of Ontario
- facilitates the conservation, protection and preservation of heritage in Ontario
- conducts heritage research
- delivers heritage education programs
- advises government on heritage matters
- delivers communication programs

Introduction

The portfolio

The Trust's constituting legislation empowers it to hold property in trust on behalf of Ontarians. The Trust currently holds 192 natural and cultural heritage properties, and tens of thousands of heritage artifacts and hundreds of thousands of archaeological objects related to our properties.

The portfolio represents **a wealth of natural and cultural heritage assets**. Many of these assets are, and will continue to be, leveraged to educate, engage and facilitate public appreciation of Ontario's rich and diverse heritage.

Marking Ontario's heritage

The Ontario Heritage Trust began nearly 60 years ago with the Provincial Plaque Program, placing markers in physical spaces that recognized the significant people and events that have shaped the province. Over the years, the Trust has created opportunities for people to experience these stories and to explore historical places through visitor attractions, plaques, online content and Doors Open Ontario. The Trust continues to highlight, explore and share moments from the past that have shaped Ontario – moments that Ontarians can take pride in, and that underpin our shared sense of identity as Ontarians and as Canadians and that highlight Ontario's unique place in the Canadian story.

Introduction

The purpose of the Strategic Plan

This new five-year strategic plan for the Ontario Heritage Trust is designed to:

- set out our vision for the future
- establish the guiding principles of our mission
- provide clear, actionable goals and strategic initiatives that will drive our success
- provide overarching direction for our annual business planning processes required under the Agencies and Appointments Directive
- provide a longer-term organizational “north star”
- celebrate and animate the Trust’s leadership role as the province’s heritage agency

The Strategic Plan serves a dual purpose

1. **Internally:** To guide organizational planning and resource deployment to strengthen and enhance the Trust’s assets, programs and services
2. **Externally:** To communicate the purpose, value and role of the Trust in celebrating and promoting awareness and pride in Ontario’s rich and diverse heritage

Introduction

Why does heritage matter?

Heritage connects Ontarians to a broader story, fostering a sense of belonging and shared identity. This connection creates a feeling of value and makes individuals feel part of something larger than themselves. Ontario's diverse population comes from a wide range of backgrounds and geographies, resulting in a multitude of places and stories to share and celebrate. By exploring, connecting and sharing this diversity, the Trust can help Ontarians understand the world they live in, providing a foundation for a stronger Ontario identity. The Trust's work can foster pride and a stronger sense of place, encouraging civic engagement and promoting a sense of belonging.



Josiah Henson Museum of African-Canadian History, Dresden.

Strategic Plan

Vision

A future in which Ontario's heritage is valued, vibrant and inspiring.

The Trust is committed to preserving our cultural and natural heritage and ensuring its continued relevance for future generations. We are working toward an Ontario where heritage is not only preserved and valued, but is celebrated, enjoyed and used as a source of inspiration. The Trust will be a beacon in an Ontario where heritage is preserved, protected and promoted in ways that are sources of pride for all Ontarians.

The Trust's vision is supported by the following pillars:

- **Value:** We realize the historical, cultural, economic and social value of Ontario's heritage
- **Vibrancy:** We continue to steward and care for Ontario's built, natural and cultural heritage responsibly to ensure that the assets owned by the Trust are vibrant, visible and relevant to Ontarians
- **Inspiration:** We invite everyone to experience, explore and be inspired by Ontario's diverse heritage

Strategic Plan

Mission

The Trust stewards and protects Ontario's diverse heritage, fostering public engagement and appreciation while promoting a sense of belonging for all Ontarians by creating lasting connections between the stories of the past and the people of today.

This mission is underpinned by the following foundations:

- **Leadership:** Leading the protection and care of the province's cultural and natural heritage in a sustainable way to generate social and economic impact
- **Heritage assets:** Deploying the assets that fall under the Trust's mandate, including built and natural properties, artifacts and archaeological items
- **Public engagement:** Building public engagement in Ontario's heritage and the Trust's work by sharing stories in a way that sparks curiosity and public interest
- **Celebrating:** Celebrating the province's heritage and connecting it with today's world helps Ontarians understand our shared past; these celebrations cultivate a sense of pride, belonging and identity



Barnum House, Grafton.

Strategic goals

To realize the vision and mission of the Trust, the areas of focus for its operations and activities will be structured around the three goals shown in the diagram below.

These three goals together are self-reinforcing. Sustainably managing the heritage property portfolio allows us to deliver transformative heritage experiences. These heritage experiences and increased public interest help to cultivate meaningful relationships and engagement with communities, which in turn lead to further revenue generation opportunities, more investment in the preservation of our properties and delivery of our heritage programs.

Goals are interrelated and mutually reinforcing.

Goal 1

Manage the portfolio for sustainable heritage impact

Pursuing a fiscally responsible and systematic approach to managing assets, making strategic and transparent decisions about which properties to invest in and which stories to tell. Ensuring properties serve their purpose and align with our goals through clear roles and effective management.

Goal 2

Deliver transformative heritage experiences

Focusing on creating engaging experiences that inspire curiosity and foster a deeper understanding of Ontario's heritage, creating lasting connections between the stories of the past and Ontarians of today.

Goal 3

Connect with communities, stakeholders and the public

Building strong, reciprocal and lasting relationships with diverse communities across Ontario, moving beyond a transactional approach to engagement, emphasizing the importance of understanding community needs, values and aspirations related to heritage.

Goal 1

Manage the portfolio for sustainable heritage impact

Being a good steward means using a fiscally responsible and intentional approach to managing assets and making strategic and transparent decisions about which properties to invest in and which stories to tell, ensuring that properties serve their purpose and align with our goals through clear roles and effective management.

It is the Trust's responsibility to protect, conserve and maintain all the assets in its portfolio, to work to understand these resources and to find innovative ways to share the spaces and stories with the people of Ontario. It is our aim to ensure that assets and programs serve their purposes and align with our goals through clear roles and effective management. We plan to do this with respect for those who came before us, with relevance and authenticity for the people of today, and sustainability for people who will come after us.

Goal 1

This goal ...

- focuses on developing a framework to evaluate different projects and programs, asset uses and initiatives that will make the Trust's objectives explicit
- recognizes the need to balance financial costs, conservation goals, interpretive potential and broader social and cultural benefits associated with different heritage sites
- aims to support the Trust in deploying its assets strategically to maximize benefit, understanding that all assets have potential
- guides how we use our resources, as well as invest in and use our properties

We will ...

- actively monitor and manage our heritage assets
- improve and invest in processes and digital tools to support conservation management and planning
- develop tailored strategies to ensure that every asset in the portfolio is used to its fullest potential
- develop and use a cost-benefit analysis framework to evaluate different projects, programs, asset uses and initiatives according to both financial costs and broader social and cultural benefits
- identify which properties have the greatest potential to deliver heritage value – including programming, public engagement and economic return



Inside the Elgin & Winter Garden Theatres, Toronto. Photo: Logan Rayment.

Goal 1

Sustainable portfolio management principles:

- **Leveraging assets:** We will identify the best opportunities to leverage assets to create programming, tell stories and engage the public. We will analyze which assets can best be used to tell stories and engage the public and provide interpretation and enjoyment.
- **Financial responsibility:** We will use a financially responsible and sustainable approach to asset management. This includes limiting deficit spending to only those initiatives that will deliver a heritage impact.
- **Focus on value:** We will clearly define the value of the Trust's assets and manage them with the goal of maximizing that value for the people of Ontario. This includes recognizing that heritage assets can have multiple dimensions of value and are not merely about the past.

Goal 1

How we will deliver on this goal:

- We will develop and use a cost-benefit analysis framework to evaluate different heritage projects, programs and initiatives that assesses both financial costs and broader social and cultural benefits.
- **Valuing non-market benefits:** We will consider non-market benefits such as cultural value, community identity and educational opportunities, which are not easily expressed in monetary terms. We will develop and apply methods to quantify the value of intangible benefits (for example, through surveys or community consultations), recognizing that these benefits are often underestimated.
- **Standardized assumptions:** We will standardize assumptions across different projects to make comparisons more accurate. We will adopt consistent policies across the organization – such as a standard discount rate, standardized values for non-market benefits and common measures of effectiveness.
- **Economic lens:** We will assess the return on investment (ROI) for each asset as responsible stewards of public funds, considering financial sustainability, recognizing that financial returns are only one part of multiple dimensions of heritage value.
- **Prioritization:** We will use the cost-benefit analysis to prioritize projects and programs that offer the greatest social, cultural and economic return on investment. We will direct resources to promising projects that have the highest potential to impact the community positively in multiple dimensions, promoting transparent decision-making.
- **Transparency and accountability:** We will apply cost-benefit analysis to ensure that the decision-making process is more transparent and accountable. We will communicate our rationale to stakeholders, be deliberate and intentional in our allocation of resources, and clearly identify which heritage projects offer the most benefit for every dollar spent.

Goal 1

Achieving this goal will ...

- support the Trust to make strategic investment decisions that are focused on achieving maximum heritage impact while maintaining financial sustainability
- allow the Trust to invest in initiatives that are directly tied to its goals and government priorities
- allow the Trust to balance financial sustainability, as well as social, cultural and educational value
- support the Trust in identifying appropriate uses for all our properties that balance conservation needs of the property, its interpretive and research potential and the financial sustainability of each site
- balance conservation with use and program benefits, focus on making our heritage assets accessible to the public, and leverage them to tell Ontario's story in compelling and meaningful ways and ensure roles and responsibilities of all stakeholders are clearly defined



Fulford Place, Brockville.

Goal 1

Outcomes and impact:

- evidence-based, strategic approach to managing the Trust's heritage portfolio
- improved planning and resource allocation
- limited deficit spending
- improved long-term sustainability
- higher-impact programming and greater public engagement
- greater transparency in stewardship and decision-making
- improved social, cultural and economic value for all Ontarians



RC Harris Water Treatment Plant, Toronto. Photo: Samuel Kolber.

Goal 2

Deliver transformative heritage experiences

The Trust started with the Provincial Plaque Program – putting markers in physical spaces that recognized the significant people and events that have shaped our province. Plaques are reminders of public memory and stand as symbols of something we value as a province. Over the years, we have continued to highlight, explore and share moments from the past that have left a lasting impact on our province. We create opportunities not only for people to explore these stories through interpretation (for example, magazines or online content) but also opportunities to explore places through visitor attractions (for example, museums), Doors Open Ontario and marking places where events occurred through the Provincial Plaque Program.

Ontario's heritage is a narrative made from the stories of countless people. It is a big story made from countless little stories passed down through many generations of people in many ways. These stories come together to form something special.

Heritage can connect Ontarians to this broader story, highlighting shared identity, cultivating a sense of belonging, and promoting further learning. Ontario's diverse population comes from a wide range of backgrounds and geographies, resulting in a multitude of places and stories to explore, share and celebrate. By highlighting and connecting these diverse narratives, the Trust can help Ontarians understand who they are and where they live, encouraging further exploration, providing a foundation for a stronger Ontario.

Goal 2

This goal ...

- aims to foster a sense of belonging, pride and social cohesion through heritage experiences that will contribute to a strong provincial identity
- focuses on the important role that the Trust plays in connecting people to the stories that make Ontario what it is today – including research and interpretation
- recognizes the vital role that heritage plays in shaping Ontario's identity and bolstering its economy through heritage tourism
- ensures that stories are told in a way that matters to people – that will inspire them to explore their world, both physically and intellectually
- emphasizes the need to deliver meaningful experiences that connect people with heritage, that showcase and celebrate, and that help people understand Ontario's heritage
- aims to knit together stories to create provincewide identity within our national and global contexts

We will ...

- leverage our programs and initiatives to inspire a deeper understanding of Ontario's heritage to create lasting connections between people and our past
- actively engage the public, foster a deeper understanding of the past, and create a lasting impact on Ontario's cultural landscape
- keep our ear to the ground, be ready to tell stories in a way that helps people make sense of their changing world, and to celebrate and learn from our shared heritage



Goal 2

Delivering stories that matter:

We will apply a three-part approach to identify and evaluate program opportunities. This includes learning from what works best about our ongoing flagship programs and using that to enhance our work, while always being rooted in the Trust's mandate. This will enable us to ideate, evaluate and develop ideas that sit at the intersection of three factors:

- 1. Desirability (what people want):** Understanding the interests of target audiences will ensure that programs are relevant, engaging and meaningful
- 2. Format (how people want to access):** Understanding how people want to access stories
- 3. Viability (what is sustainable):** Evaluating and assessing whether programs are financially sustainable, technically and operationally possible (with available resources and expertise), and aligned with resources and long-term goals

Goal 2

How we will deliver on this goal:

- **Marking heritage in public places:** We will continue to recognize, celebrate and commemorate significant people, places and events in Ontario's history through the Provincial Plaque Program. We will ensure that the program continues to grow by highlighting meaningful stories and showcasing the impact of ordinary people on the lives of Ontarians in the spaces that people use every day.
- **Relevance and connection:** We will create initiatives that connect and tie stories together to tell not only individual stories of people, places and spaces, but to explain how those stories have shaped Ontario within a national and global context. We will also invite Ontarians to see themselves within these stories, focusing on the relevance of heritage in the present day by connecting the past with contemporary issues and personal experiences.
- **Inclusivity and equity:** We will ensure that services reflect the experiences and needs of Ontario's diverse population. We will make a concerted effort to build relationships with Indigenous communities, faith-based organizations, racialized communities and other underrepresented groups so that their experiences and contributions are recognized and celebrated as integral parts of shaping the province.
- **Bringing people together:** We will continue to support in-person programs like Doors Open Ontario that allow Ontarians to experience heritage places together and share the stories behind them, supporting a deeper understanding of the province's history and culture. This program creates opportunities for people to connect with stories and places across Ontario, boosting local tourism and economic impact to participating communities.
- **Inspiration and curiosity:** We will inspire people to seek a deeper understanding of heritage on their own terms. This will ensure that experiences encourage people to ask questions about why the world is the way it is and provide a framework for exploration.
- **Emotional engagement:** We acknowledge that heritage creates an emotional connection with the people and places of Ontario. We will move beyond the presentation of historical facts. This includes storytelling, sensory engagement and opportunities for personal reflection.
- **Innovation and creativity:** We will embrace new technologies. This includes exploring digital technologies and innovative ways of presenting heritage content.

Goal 2

Achieving this goal will ...

- transform Ontarians' relationships with heritage and promote its relevance in their lives
- celebrate things that we are proud of as a province
- connect people with heritage in the province and in their communities
- grow our understanding of Ontario's heritage



LeFeuvre-Chupac property, Northern Bruce Peninsula

Goal 2

Outcomes and impact:

- increased public engagement with Ontario's heritage sites and stories
- a deeper understanding of the relevance of heritage in the present day
- greater appreciation of the diversity of Ontario's heritage
- enhanced contribution to Ontario's identity and sense of belonging
- more active participation in heritage preservation and promotion
- a greater sense of connection and belonging among Ontarians
- increased visitation, both in-person and digital
- development of unique and memorable heritage experiences that are valued by a diverse audience



Inside the Simcoe County Museum, Minesing. Photo: Doors Open Simcoe County.

Goal 3

Connect with communities, stakeholders and the public

The Ontario Heritage Trust serves the entire province of Ontario. We have a broad mandate that covers a complex and changing area of work.

This goal ...

- includes marketing and promoting the Trust while also creating meaningful connections with communities and ensuring that the Trust's work is driven by the needs of Ontarians and the interests of Ontario
- focuses on understanding our impact and being able to communicate it to people
- requires us to understand our services and our audiences and to be able to connect them in a way that is appealing and inspiring
- challenges us to find new ways to share the story about ourselves and our services that keep people curious, help people to understand the importance of heritage and help them to see how they fit in with the heritage ecology – they are part of what we do
- focuses on building strong, reciprocal and lasting relationships with diverse communities across Ontario through a shared appreciation of heritage
- emphasizes the importance of understanding community needs, values and aspirations with respect to heritage; by prioritizing authentic dialogue, we will ensure our continued relevance, build trust and foster a sense of shared stewardship of Ontario's heritage

Goal 3

We will ...

- ensure that our work continues to be relevant, meaningful and impactful by inspiring and building genuine relationships with diverse communities across Ontario
- communicate in a way that aims to meet people where they are
- develop innovative content, adopting advanced marketing techniques and optimizing our marketing platforms and tools
- leverage insights about our stakeholders and audiences and refresh our brand and value proposition messaging
- promote public events like Doors Open, Heritage Week, Emancipation Day and the Lieutenant Governor's Ontario Heritage Awards as opportunities for the public to connect with heritage
- pay attention to what others are doing and make connections with what we do to make the world heritage friendly
- sell our services, programs, ideas and our brand to audiences in Ontario, the rest of Canada and beyond



Inside the Canadian Niagara Power Plant, Niagara Falls, during Doors Open Ontario.

Goal 3

Public engagement principles:

To create campaigns that resonate with audiences, deliver high-quality program experiences and foster inclusivity, we will use a marketing growth model, which involves:

- 1. Understanding what people care about:** Gathering feedback and data to learn what people love about Ontario's heritage, their values and how stories resonate with their identities and sense of community
- 2. Creating campaigns that inspire:** We will build campaigns that meet people where they are, make outreach more personal, and help the public connect with Ontario's history
- 3. Making it happen:** Bringing heritage to life with the right tools and teams to deliver success

Goal 3

How we will deliver on this goal:

- **Authentic engagement:** We will prioritize genuine dialogue and reciprocal relationships with communities, moving beyond a simple “telling” of the Trust’s story. Ensure that engagement is not just about promoting the Trust’s initiatives, but also a way of listening and responding to community needs.
- **Relevance and reciprocity:** We will seek to understand community values and create opportunities for people to see the importance of heritage in their daily lives. We will ensure that the Trust’s work is directly relevant to the lives of Ontarians and that relationships are mutually beneficial. We will develop a value proposition for Ontarians so they understand why it’s important to protect and steward their heritage.
- **Brand and public persona:** We will clearly define the Trust’s public persona to ensure that it is relevant to diverse audiences and that it is connecting with community values. Use this to guide all services and content.
- **Strategic partnerships:** Work with other organizations, such as educational institutions, regional tourism organizations and community groups to leverage opportunities to add value to local tourist initiatives that support the Trust’s mandate and goals, thereby expanding the reach and impact of the Trust’s work.



The Canadian Automotive Museum in Oshawa is a popular Doors Open Ontario site.

Goal 3

Achieving this goal will ...

- help the Trust be an organization that not only preserves heritage but also empowers people to see themselves as active stakeholders in heritage and the work of the Trust
- ensure the Trust's financial sustainability through increased fundraising, volunteer participation, community connections, tourism, social interaction and public awareness



Niagara Apothecary, Niagara-on-the-Lake.

Goal 3

Outcomes and impact:

- increased community participation in Trust initiatives
- enhanced relevance and public awareness of the Trust
- increased support for the Trust and its mission
- a greater sense of community ownership of Ontario's heritage



Emancipation Day celebrations at Josiah Henson Museum of African-Canadian History, Dresden.

Goal 3

Fundraising

Fundraising is closely connected to the outcomes of this goal, which is focused on building relationships with the community and public engagement. Achieving this goal will create more public interest and awareness of the Trust and its mission that, in turn, will help with fundraising efforts. Raising the profile of the Trust, cultivating curiosity and demonstrating the value of heritage are essential for attracting potential donors and sponsors. As people become more connected to the Trust and its mission, they are more likely to donate, volunteer and support the Trust.



Peter Dalglish plaque unveiling at Barnum House, Alnwick/Haldimand Township

Key performance indicators

Our success in achieving the strategic goals will be measured using a targeted set of key performance indicators (KPIs). The following is a representative set of KPIs aligned to each strategic goal considering expected benefits and outcomes.

Goal 1

- percentage of projects evaluated using the cost-benefit analysis framework
- percentage of built properties with up-to-date building condition reports
- number of projects approved based on highest ROI across social, cultural and economic dimensions
- projected versus actual financial ROI for heritage projects
- percentage of asset replacement value spent on repairs and maintenance
- percentage of asset replacement value spent on capital investment
- number of heritage projects that achieve self-sustainability
- funding efficiency: cost per dollar of benefit realized
- percentage of built properties fully used and usage rates (number of days, months, etc.)

Key performance indicators

Goal 2

- total number of visitors at all Trust attractions
- percentage increase in visitation (in-person and digital, including website visits, social media followers/impressions/engagements and media mentions)
- percentage of visitors that return to Trust heritage experiences
- number of new program or service experiences launched
- number of new plaques unveiled
- mix of heritage experience formats (for example, physical and digital tours, workshops, etc.)
- visitor satisfaction score for new/enhanced heritage experiences

Goal 3

- growth and dollar totals for individual donations, sponsorships
- brand sentiment analysis and public recognition surveys that assess awareness, trust and alignment with heritage aspirations
- number of meaningful interactions with community partners
- number of events/communities, faith-based groups participating in Doors Open Ontario
- number of in-person visitors, website visits and media stories about Doors Open Ontario
- number of media features, website visits and social media engagements related to heritage stories
- percentage increase in number of active volunteers engaging in heritage conservation efforts
- percentage increase in target audience segments (for example, youth)