



An agency of the Government of Ontario

Business Plan

2025-2026

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heritagetrust.on.ca

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1. EXECUTIVE SUMMARY

The Ontario Heritage Trust (OHT or the Trust) is an agency of the Ministry of Citizenship and Multiculturalism (MCM). With a **provincewide mandate to preserve, interpret and share Ontario's provincially significant natural and cultural heritage**, the Trust acts as a centre of expertise and serves as the heritage trustee and steward for the people of Ontario, celebrates its diversity and educates Ontarians of its importance in our society. [Ontario Heritage Act, R.S.O.1990]. As a Commission public body, the Trust preserves and provides access to its properties through leases, licenses, business operations and visitor attractions.

In delivering on its legislated mandate, the Trust's vision is for an Ontario where the places, the landscapes, histories, traditions and stories that embody our heritage are conserved, valued and shared, now and for future generations.

The focus for 2025-26 will be:

- understanding the impact of the Trust's work
- identifying opportunities to increase the Trust's sustainability
- ensuring that services are efficient, effective and meeting the needs of the marketplace
- continuing to deliver on government priorities and its mandate

Of particular focus this year, the Trust will prioritize:

- raising awareness of the Trust and its work, particularly its owned properties and the Provincial Plaque Program
- strategically investing in the care and conservation of visitor attractions and publicly accessible sites

This business plan has been written while the Board of Directors is developing a Strategic Plan that will guide the Trust's work for the next five years.

2. FOUNDATIONAL OPERATING PRIORITIES

Government of Ontario (GO) objectives

The Ontario Heritage Trust's (OHT) 2025-26 foundational operating priorities are informed by following the Government of Ontario's objectives through the Letter of Direction, dated October 17, 2024. These objectives collectively define the government's overarching goals. As part of the Government of Ontario, the OHT is expected to act in the best interests of the people of Ontario and ensure that we provide value for money while also adhering to all applicable government policies and directives.

In 2025-26, the Government of Ontario expects that the Trust will continue to be innovative, sustainable and accountable. Areas of focus will include:

- competitiveness, sustainability and expenditure management
- transparency and accountability
- risk management
- workforce/labour management
- diversity and inclusion

- data collection, sharing and use
- digital delivery and customer service

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

- fight racism and remove systemic barriers
- promote economic opportunity
- conserve and steward heritage
- promote citizen engagement

Additional details on these foundational operating priorities can be found in the next section of this business plan.

The Government of Ontario has three key objectives for board-governed provincial agencies:

GO#1. To be innovative

- simplify client/customer interactions
- expand and optimize digital service offerings
- improve client/customer satisfaction
- share data with Supply Ontario, when requested, regarding procurement spending and planning, contract arrangements and vendor relations to support data-driven decision-making

GO#2. To be sustainable

- strengthen public-service delivery by optimizing organizational capacity and directing existing resources to priority areas
- use public resources efficiently and
 - a) operate within the agency's financial allocations
 - b) prudently and responsibly manage workforce size; where an agency requires a material increase in workforce size, the agency must provide the Minister with a Human Resources (HR) plan for approval that provides the rationale based on government priorities and/or agency mandate

GO#3. To be accountable

- protect individual, business or organization data by actively managing data and cybersecurity and reporting Artificial intelligence (AI) uses (if any)
- report all high risks, including effective mitigation plans
- align hybrid work policies with those of the Ontario Public Service (OPS) and identify and assess office optimization opportunities to reduce office realty footprint and find cost reductions
 - a) collaborate with the Ministry of Infrastructure (MOI) to identify office space opportunities
 - b) align with the Management Board of Cabinet (MBC) Realty Directive and the OPS Modern Office Space (OMOS) standards
- develop and encourage diversity and inclusion initiatives by promoting an equitable, inclusive, accessible, anti-racist and diverse workplace

MCM has four overarching objectives:

Ministry of Citizenship and Multiculturalism (MCM) objectives

The Ontario Heritage Trust's (OHT) 2025-26 foundational operating priorities are also informed by following MCM's four overarching objectives, taken from the MCM Workplan, dated May 2024. These objectives collectively define MCM's overarching goals. Every division, branch, team and individual within MCM recognizes themselves within these priorities and comprehends their interrelated nature.

MCM#1. Fight racism, remove systemic barriers

- MCM provides anti-racism leadership and expertise to create more opportunities and prosperity for people as we work toward a barrier- and discrimination-free province

MCM#2. Promote economic opportunity

- MCM is working to remove barriers from programs and policies and create equitable opportunities for youth, small businesses and organizations across the province, especially for marginalized groups facing barriers to success

MCM#3. Conserve and steward heritage

- MCM is working to advance its mandate regarding resources to make Ontario a place where people want to live, work and visit

MCM#4. Promote citizen engagement

- MCM celebrates and recognizes the outstanding achievements of Ontarians who have made a positive impact in their community and the province, while encouraging civic participation, community leadership and volunteerism

Overall GO and MCM objectives

- ☑ **GO#1. Innovative**
- ☑ **GO#2. Sustainable**
- ☑ **GO#3. Accountable**
- ☑ **MCM#1. Fight racism, remove systemic barriers**
- ☑ **MCM#2. Promote economic opportunity**
- ☑ **MCM#3. Conserve and steward heritage**
- ☑ **MCM#4. Promote citizen engagement**

Trust priorities	Description	Trust programs and initiatives
Focus on improvements in data collection, digital delivery and customer service	<p>Improvements on how the Trust uses data in decision-making, information sharing and reporting, to inform outcome-based reporting and improve service delivery.</p> <p>Additionally, look at digitization for online service delivery to ensure customer service standards are met.</p> <p>☑ SUPPORTS GO OBJECTIVE #1</p>	<ul style="list-style-type: none"> • Client-focused, digital/data-driven modernization of heritage programs • New Trust web exhibits
Optimized workforce and labour management	<p>The optimization of the Trust's organizational capacity to support the best possible public-service delivery, including redeploying resources to priority areas, where needed.</p> <p>☑ SUPPORTS GO OBJECTIVE #2</p>	<ul style="list-style-type: none"> • Internal strategies for HR and accommodations that are in alignment with OPS directives and policy • Prudent and efficient management of operational funding and workforce size
Process-driven risk management delivery	<p>An effective process for the identification, assessment and mitigation of agency risks, including cybersecurity and any future emergency risks that abide by OPS risk management processes and requirements.</p> <p>☑ SUPPORTS GO OBJECTIVE #3</p>	<ul style="list-style-type: none"> • Quarterly risk-management communications with the ministry • Active efforts focused on the mitigation of any risks to the Trust, ministry and the provincial government
Initiatives directed toward diversity and inclusion	<p>Diversity and inclusion initiatives through the promotion of an equitable, inclusive, accessible, anti-racist and diverse workplace.</p> <p>☑ SUPPORTS GO OBJECTIVE #3</p>	<ul style="list-style-type: none"> • Advocate for community opportunities • Support stakeholders on matters of cultural heritage
Strengthen relationships with Indigenous and	<p>Engage communities to ensure that programs, policies and services</p>	<ul style="list-style-type: none"> • Engage Indigenous groups on anti-racism initiatives/ programs

Trust priorities	Description	Trust programs and initiatives
faith-based organizations and racialized communities	<p>reflect the experiences and needs of our diverse province</p> <p>☑ SUPPORTS MCM OBJECTIVES #1, #3 and #4</p>	<ul style="list-style-type: none"> • Trust commemorations of former Residential Schools and associated burial sites • Josiah Henson Museum programming • Faith-based organizations outreach
Promote stewardship of heritage	<p>Ongoing support for the conservation of cultural heritage resources that are important to Ontarians and that reflect our diversity</p> <p>☑ SUPPORTS MCM OBJECTIVES #1, #3 and #4</p>	<ul style="list-style-type: none"> • Doors Open Ontario • Provincial Plaque Program • Protect, manage and modernize 400+ Trust properties • Trust geospatial data platform
Administer the applicable components of the Ontario Heritage Act and support land-use planning in an appropriate advisory role	<p>The ministry supports the conservation of Ontario's irreplaceable cultural heritage resources. It has a core regulatory role under the Ontario Heritage Act, and as a commenting agency within the provincial land-use planning system.</p> <p>☑ SUPPORTS MCM OBJECTIVE #3</p>	<ul style="list-style-type: none"> • Management of Trust records and collections • Advisory services to planners
Honour achievements of exceptional Ontarians	<p>Promote a sense of belonging and encourage civic and citizen engagement by honouring and recognizing the achievements of exceptional Ontarians</p> <p>☑ SUPPORTS MCM OBJECTIVES #2 and #3</p>	<ul style="list-style-type: none"> • Administer the Lieutenant Governor's Ontario Heritage Awards
Define and view our heritage conservation work through the development of key deliverables	<p>The Ontario Heritage Act describes our mandate, and our legislated role is guided by the Letter of Direction.</p> <p>☑ SUPPORTS GO and MCM OBJECTIVES</p>	<ul style="list-style-type: none"> • Use the Ontario Heritage Act and the Letter of Direction to guide our strategic direction

3. ENVIRONMENTAL SCAN

INTERNAL

Workforce/Resource availability

- With 12 per cent of its workforce eligible to retire, the Trust is facing several retirements, requiring thoughtful and timely planning to ensure the continuity of services and programs, while maximizing opportunities to adapt staffing to current and future needs.

Multi-modal program delivery/programming

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

Asset management

- The Trust holds diverse heritage property assets across Ontario that require specialized management and conservation. As the properties continue to age, and climate conditions change, the Trust needs to adapt how it tracks current and detailed information about its assets — including changing conditions, the digital mapping of Trust assets, and up-to-date Building Condition Reports and Baseline Documentation Reports that are made available for immediate response.

EXTERNAL

Legislative changes/political considerations

- Legislative changes in 2020 to the Conservation Authorities Act have resulted in several conservation authorities — who previously managed natural heritage properties for the Trust — withdrawing their services. The Trust has had to shift to directly operate these sites and/or find new organizations that will manage the sites for the Trust. Through these actions to ensure proper stewardship, the Trust's operating costs have increased.
- Ontario's municipalities continue to face a variety of challenges, including inflation, changes to interest rates and labour shortages (see <https://www.amo.on.ca/policy/finance-infrastructure-and-economy/municipal-finance-backgrounder>). The Trust relies on some municipalities to steward properties and deliver programming. This work will be impacted by these ongoing constraints and the Trust may need to shift to directly deliver these services as well.

Economic

- According to The Toronto Dominion (TD) Economics Long-Term Forecast (see <https://economics.td.com/ca-long-term-forecast>), Canadian economic growth is expected to run below trend in 2025 and 2026, before finding greater balance in 2027. Slowing population growth and the impact of tariffs on business and consumer sentiment are the drivers of lower growth. Consumer spending had been improving on lower interest rates, but this is expected to act as a drag on growth as higher prices cut into spending power. This has the unemployment rate moving above its long-run level until 2027.
- After a period of somewhat stable inflation, headline and core consumer price inflation are expected to remain above target through 2025 on trade tariffs, before starting to return to the 2 per cent target over the medium term. The Bank of Canada is expected to cut its policy rate

back to the neutral rate of 2.25 per cent in 2025. The loonie is expected to return to the 74-76 U.S. cent range once Canadian economic growth can catch up to the U.S.

- Heritage organizations across Ontario are experiencing challenges with revenue generation (fewer grants available for heritage conservation), declining memberships and changing operational needs, along with increasing heritage building maintenance needs and costs. As a result, the Trust has received a marked increase in requests from heritage organizations for technical support, annual operating funding, and funding for stewardship work.
- According to the 2024 Giving Report from Canada Helps ([see_ https://forcharities.canadahelps.org/charity-life-blog/the-2024-giving-report-insights-for-charities](https://forcharities.canadahelps.org/charity-life-blog/the-2024-giving-report-insights-for-charities)), charitable donations are diminishing, while charity usage in Canada is at an all-time high.
- As trading relationships may shift between the United States and Canada, there may be implications on the cost of materials. Vendors may also be reluctant to bid on construction projects if the cost of materials is uncertain.
- Geopolitical economic repercussions arising from new trade policies may affect investment revenues as stock markets respond to tariffs within a rapidly evolving global trade network.

Environmental

- The Province of Ontario has articulated a need to increase housing supply in Ontario. Communities may be looking for support to adaptively reuse heritage buildings as a way of meeting housing needs.
- Climate change is impacting the conservation of natural and cultural places in Ontario through increased costs and staffing.
- Urbanization is increasing pressure to conserve green spaces in certain parts of Ontario, as it is important that people have access to public green spaces.
- Expanded use of the Trust's trails and natural areas are increasing demands on site maintenance and visitor amenities.

Social

- Organizations and communities across Ontario continue to conserve, commemorate and celebrate heritage through community museums, archives, historical societies, cultural groups, archaeology and adaptive reuse of heritage buildings. Heritage is valued and an important part of Ontario's social, cultural and physical fabric.
- As the population of Ontario continues to grow and become more diverse, the needs and expectations of the people of Ontario continue to evolve. The Province of Ontario is focused on supporting vibrant and inclusive communities and fighting racism and hate, and the Trust needs to be ready to respond to these priorities.

4. INITIATIVES INVOLVING THIRD PARTIES

The Trust maintains a wide range of relationships with tenants and licensees (for example, site operators and stewards — including conservation authorities, municipalities, federal agencies, provincial ministries and agencies, Indigenous communities and land Trusts), school boards, charitable foundations, universities, historical societies and other non-government organizations. While each body requires a slightly different approach, Trust staff collaborate closely with the parties in their portfolios to:

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

The Trust works with third parties in the following ways:

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

5. OVERVIEW OF CURRENT AND FUTURE PROGRAMS AND ACTIVITIES

The Trust offers a wide range of programs and activities that conserve provincially significant cultural and natural heritage, interpret Ontario's history, celebrate Ontario's diversity and educate Ontarians of the importance of heritage in our society. This is done in three key areas:

1. effectively own, manage, protect and promote a portfolio of provincially significant heritage properties¹
2. act as a centre of expertise on the protection and conservation of significant heritage properties²
3. educate the public in the role and importance of Ontario's heritage³.

We ensure that these programs and activities are aligned with the Trust's mandate and guided by the government priorities of innovation, sustainability and accountability. We strive to ensure that our programs are accessible and promote equity, diversity, inclusion, reconciliation and anti-racism.

Our programs contribute to local economies, support tourism, provide educational opportunities and support growing community capacity for the celebration and promotion of heritage.

In 2025-26 and beyond, Trust programs and activities will focus on providing key services in six broad areas, as below:

- A. meaningful experiences with heritage properties
- B. conserving heritage assets
- C. telling the story of Ontario
- D. research and analysis
- E. asset management
- F. serving as a trusted heritage advisor

¹ **Mandate:** receive, acquire and hold property in Trust for the people of Ontario; preserve, maintain, reconstruct, restore and manage property of historical, architectural, archaeological, recreational, esthetic, natural and scenic interest.

² **Mandate:** advise and make recommendations to the Minister on any matter relating to the conservation, protection and preservation of the heritage of Ontario; support, encourage and facilitate the conservation, protection and preservation of the heritage of Ontario.

³ **Mandate:** conduct research and implement educational and communications programs necessary for heritage conservation, protection and preservation.

A. Meaningful experiences with heritage properties

One of the Trust's mandated responsibilities is to "support, encourage and facilitate the conservation, protection and preservation of heritage in Ontario."

"No one will protect what they don't care about and no one will care about what they have never experienced."

-Sir David Attenborough

People protect things they care about. Similarly, the Trust is committed to delivering programs that people care about. We provide people with meaningful interactions with our heritage properties. From directly running visitor attractions and supporting local communities to make sites available, to creating space within Trust-owned properties for people to have meaningful experiences, we create opportunities for people to interact with our heritage spaces, embrace their esthetic value and share in the stories they tell. We also provide online public access to our heritage properties through tours and digital programming.

Visitor attractions

The Trust directly operates several of our heritage sites as attractions for visitors in search of experiencing our province's history, both natural and cultural.

At the **Josiah Henson Museum of African-Canadian History** in Dresden, the Trust interprets the history of racism and slavery in Ontario, and the struggle against these forces. The museum provides events and education programs.

Fulford Place, in Brockville, is designated a National Historic Site. It is a magnificent Edwardian mansion overlooking the St. Lawrence River, and through its uniquely compelling collection of art and artifacts, the museum gives visitors insight into the lives of the Fulford family (who lived at the house) and the service staff (who cared for the household) as well as social and economic structures of early 20th-century Ontario.

The **Cheltenham Badlands** is one of Ontario's geological treasures, formed at the base of an ancient sea about 450 million years ago. Its distinctive landscape was created as the result of erosion. The Badlands draws visitors for ecotourism, recreation and wildlife viewing.

The **Elgin & Winter Garden Theatres (EWG)** is a national historic site and the last stacked theatre operating in the world. The Trust offers guided and group tours, providing stories and insights into its history and restoration. The EWG continues to be a fully operational theatre complex, hosting a variety of live theatrical performances throughout the year.

Walking trails are found at many Trust properties, including Scotsdale Farm in Halton Hills, the Ellis property in Lincoln, the Devil's Monument properties in Northern Bruce Peninsula, the Fleetwood Creek property in the City of Kawartha Lakes, the Ashbridge Estate in Toronto, and elsewhere. These trails provide visitors with unique experiences among the province's most beautiful natural heritage landscapes.

In 2025-26, we will deliver inclusive, multi-faceted programs that reflect the province's diverse audiences and narratives at Trust museums through tours, special programming and exhibits.

We will also:

- *launch the exhibit Mapping Black abolitionist communities in 19th-century Chatham-Kent at the Josiah Henson Museum of African-Canadian History (developed in partnership with the Huron Community History Centre and Western University)*
- *offer multifaceted programs at Fulford Place, exploring the museum's art collection and cultural life, including an art show, painting programs, flower arranging courses and musical performances.*

We will seek to improve accessibility by:

- *undertaking a feasibility study at the Cheltenham Badlands to obtain information on the most cost-effective location for an accessible trail to enhance the visitor experience for those with accessibility challenges; once we have accurate cost estimates, we plan to move forward with fundraising and projections for the future trail*
- *completing wayfinding improvements at the EWG to improve accessibility options for patrons visiting the venue and artists using our spaces*

To improve the visitor experience, we will:

- *collect data about visitation numbers at our highest-profile sites (for example, Scotsdale Farm, with its access to the Bruce Trail) to gain a better understanding of visitation and walking trail use month over month and to inform future upgrades to improve the visitor experience at those sites*
- *replace or develop innovative interpretive signage at Scotsdale Farm, Ashbridge Estate and Fulford Place to share the history and architecture of each site*
- *refresh the historical displays in the EWG lobby spaces to enhance branding of the Trust at the EWG and to interpret the history of the site and continue to add depth and meaning to the visitor experience*

We will also explore opportunities to collaborate with people to share stories at other Trust properties. Some examples include:

- *Toronto's Ashbridge Estate offers an opportunity to interpret its agricultural heritage, activate the grounds and highlight its value in the community (for example, the Ojibiikaan Indigenous Cultural Network will help revitalize the grounds and explore traditional growing practices)*

Rentals, licenses and leases of Trust-owned properties

Ontarians can access many of the Trust's unique spaces for their own activities, including short and long-term leases. These activities enable the Trust to generate revenue, promote public access and engage communities. Licensing properties and renting event space at our properties ensures the conservation, stewardship and sustainable use of Ontario's heritage sites.

Access through leases

The Trust has 35 lease agreements with businesses, not-for-profits and individuals in communities across Ontario in 11 buildings provincially.

License agreements

The Trust shares historical sites with local communities through license agreements. Different forms of licensing occur across the Trust's portfolio:

Licensing the Elgin & Winter Garden Theatres and their studio spaces

The EWG licenses its spaces to a variety of presenters and promoters who bring a broad range of live performances and events to the venue — spanning theatre, dance, comedy, music and opera, special events, concerts and festivals. The Trust continues to work with private-sector producers to bring new productions and experiences to the EWG, resulting in exciting opportunities at both theatres for creative artists and audiences alike.

Venue rentals

The Trust promotes the Enoch Turner Schoolhouse as a distinctive heritage venue for meetings, weddings, and corporate and special events. This activity highlights the adaptive reuse of historical sites and generates revenues to support the Trust's conservation and stewardship work. The Trust hosts approximately 50 special events at our sites each year.

Commercial filming

Many Trust sites (for example, the Ontario Heritage Centre, the Elgin & Winter Garden Theatres, Scotsdale Farm and Fulford Place) have attracted significant filming activity.

In 2025-26, we will:

- *leverage upcoming lease and license expirations to review and innovate how properties support the Trust's mandate and contribute financially to property upkeep and maintenance*
- *pilot a micro/pop-up wedding ceremony day at George Brown House and the EWG to explore new ways to create adaptive and flexible uses for our heritage properties while generating additional revenue streams; this approach drives demand to specific dates and times, helping to balance the use of spaces*
- *redesign and update theatrical lighting equipment at the EWG, aligning with industry standards and making the EWG a more versatile and competitive rental venue to a wider variety of clients*
- *research new software, hardware and IT solutions to support the needs of clients at the EWG and to allow staff more options for sharing information and improving communications with patrons and potential clients*
- *complete a feasibility study, reviewing options for EWG box office services to determine the most cost-effective platform for revenue generation and customer service excellence*
- *develop a Trust rental policy with standards and principles*
- *assess short-term and long-term rental properties for investments to make spaces more useable*

Doors Open Ontario

Doors Open Ontario (DOO) is an annual, provincewide cultural heritage program administered by the Trust. Launched in 2002, the program supports local organizers in communities that want to share their unique heritage spaces with the public. As part of Doors Open Ontario, municipalities and

local community groups host events between April and October each year. Doors Open Ontario helps to:

- create free access to the province's heritage, satisfying curiosity about what lies behind closed doors and stimulating an interest in local heritage
- attract visitors to unique cultural experiences, boosting local tourism and economic impact in participating communities
- create awareness and excitement for the province's heritage and build local interest in heritage conservation
- deliver a positive sense of community and belonging, enriching a culture of heritage volunteerism

In 2025-26, we will:

- *undertake a community organizer survey to better understand how the Trust can support communities in hosting events*
- *analyze data and identify trends to develop a better understanding of what makes a successful community event, serving to encourage and support potential community event organizers*
- *design services that meet the needs of community event organizers to help them run successful Doors Open events*
- *undertake special outreach to smaller communities, hosting an informational seminar open to all communities, and meeting with communities that have expressed an interest in participating to expand the DOO program to more communities in Ontario*
- *undertake a large visitor survey to better understand the visitor experience and audience trends*
- *provide community organizers with the tools and products they need to support use of logo and acknowledgements in advertising and on promotional media pieces, ensuring that DOO is presented as a key program of the Trust*
- *report results of DOO enhancements to the ministry*
- *actively encourage community organizers to include the types of sites that can facilitate relationships and promote local awareness - for example, infrastructure sites, such as water treatment plants and recycling plants, will help to show how communities operate. Places of worship sites, as well, will help to show the similarities and differences across faiths, certainly promoting awareness of interesting local community sites participating in Doors Open events*

Fundraising

A significant part of the Trust's operating budget relies on donations. With this reality, the Trust is working to build a community of supporters who, in turn, support the maintenance and restoration of properties, support educational and awareness activities, and expand public access to our treasured sites. The Trust invites individuals, businesses, foundations and other government agencies to assist us in our work.

We have identified compelling projects and initiatives that can be matched to the interests of potential donors. These projects bridge the Trust's priorities with those of potential sponsors (providing exposure, employee engagement, promotions and other types of activations). Through fundraising, it is our goal to build longer-term relationships and create renewable resources for the Trust.

In 2025-26, we will:

- *use innovative technology to improve donor interactions and satisfaction, offer more giving options, and enhance donor reporting*
- *market fundraising in a manner that serves to position the Trust as an agency that is nimble and focused on forging strong relationships with a community of donors*
- *seek new sponsorship opportunities and implement effective sponsorship strategies (including the development of a strategy to build a constituency of support)*
- *continue to explore the feasibility of naming rights opportunities for flagship sites and programs (for example, the Elgin & Winter Garden Theatres and Doors Open Ontario)*
- *ensure donation data consistency, improvements to reconciliation processes, and maintaining a thorough reporting of all donations*
- *develop a multi-year fundraising strategy that focuses on defining the Trust's value and impact to develop a constituency of support*

B. Conserving natural and cultural heritage assets

Under the Ontario Heritage Act, R.S.O. 1990, the Trust is mandated to conserve properties of historical, architectural, archaeological, recreational, esthetic, natural and scenic interest for the benefit of the people of Ontario. We effectively own, manage, protect and promote a portfolio of provincially significant heritage properties and assets. Conservation and capital projects form an important relationship, as the work is always ongoing. We showcase best practices and project excellence.

Conservation and capital projects are identified through regular monitoring by Trust staff and via communication with tenants and site managers, helping to identify ongoing and emerging issues that threaten heritage values on the properties. Staff who manage heritage assets maintain lists of improvements needed; these are often captured through stewardship or management plans. Projects are prioritized based on risks to heritage assets, risks to public safety, and cost. External technical conservation expertise is brought in, as necessary.

Maintenance and conservation projects

The Trust undertakes numerous building, land, archaeological and artifact conservation projects. These projects help to manage the impacts of human disturbance on highly visited properties, to increase the communities' understanding of the importance of the property (why it is protected), and to enhance the visitor experience.

The Trust undertakes land conservation projects (such as protecting habitats and ecology), using fencing, the installation of signs, designing new trails and other site infrastructure, controlling invasive species, and restoring degraded habitats by planting native and locally appropriate species.

In 2025-26, we will:

- *conduct a study to understand our property portfolio better.*
- *develop management and reporting tools, such as a new asset management system, that support analysis in the short and long terms of the Trust's property portfolio with respect to conservation, sustainability, access, issues management and risk*

- *undertake Building Condition Reports for properties that do not have up-to-date reports to support multi-year capital planning and to ensure that Trust properties comply with Standards and Guidelines for Conservation of Provincial Heritage Properties (see <https://www.ontario.ca/page/standards-and-guidelines-conservation-provincial-heritage-properties>).*
- *complete baseline documentation reports for all our properties to support key decision-making and internal accountability*
- *work with property owners to resolve encroachments and property issues on Trust lands*

C. Telling the story of Ontario

The Trust is mandated to deliver educational and communications programs that highlight heritage conservation, protection and preservation. We share stories about Ontario's heritage through interpretation, programming, exhibits (at attractions and museums as well as online) and through plaques — all reflecting the diversity of the province's places and people.

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 most identifiable program. The plaques share stories in public spaces of the people, places and events that have helped to shape the province. These plaques also enrich our sense of place and offer passersby a unique glimpse into the character of the respective location.

The Provincial Plaque Program began nearly 70 years ago and, as such, the Trust acknowledges that all plaques express the perspective, priorities and ideas of a specific time and place. This program is an opportunity to publicly explore how our understanding of Ontario's heritage has expanded over time.

In 2025-26, we will:

- *implement an updated Plaque Policy to ensure that the Trust has the systems, criteria and procedures it needs to unveil new plaques that tell these stories, and the processes to deal with queries from the community about existing plaques*
- *explore new opportunities to share the connections within our plaque program to show how these stories, across time and space, have played a significant role in creating the Ontario we know today*
- *explore opportunities to showcase on the Trust website how subjects commemorated by plaques have changed the lives of ordinary Ontarians*
- *explore whether adding unveiling dates and partners to provincial plaque listings on the database will add value to the public's understanding of the social context of plaque development as an artifact of Ontario's heritage*
- *unveil new plaques to recognize, celebrate and commemorate people, places and events of Ontario*
- *leverage the plaque program to support promoting Trust brand awareness and building a constituency of support for fundraising activities*
- *leverage digital mapping of provincial plaques to provide additional information; track feedback on public use to identify needs and possible next steps in sharing digital information in the future*

Lieutenant Governor's Ontario Heritage Awards

The Lieutenant Governor's Ontario Heritage Awards program (LGOHA), which began in 2006, recognizes exceptional contributions made by groups or individuals to cultural and natural heritage conservation. The program celebrates exceptional projects that help Ontarians experience their heritage in new and profound ways that speak to its diversity and to its dynamic character across Ontario.

In 2025-26, we will:

- *implement an updated policy and renewed guidelines for the LGOHA to ensure that the processes are efficient and streamlined, making it easier for the public to apply and for the jury to assess*
- *showcase the work of award recipients to connect the public to heritage innovation and challenges in communities across the province*

Public communications

The Trust's Marketing and Communications team maintains the Trust's brand and presence. The team plays a crucial role in promoting the Trust's online presence (including the Trust websites and social media platforms), raising awareness of the Trust brand, engaging the public, supporting revenue generation and collaboration.

Examples of public communication tools include social media channels (Facebook for the Trust and the EWG, Instagram, LinkedIn, YouTube and X/Twitter); the corporate website; the EWG subsite, the Doors Open Ontario website; the *Heritage Matters* magazine website; and the bimonthly newsletter *Heritage Matters ... more!*

In 2025-26, we will:

- *undertake new social media content to deliver updated and diverse photo/video assets of sites and programs*
- *create a refreshed corporate website to strengthen the connection between the work of the Trust and how heritage is experienced by the public*
- *launch a new digital exhibit in 2025-26, showcasing the Trust's archaeology work on the First Parliament site, which will highlight the partnership with Metrolinx and Infrastructure Ontario*
- *increase emphasis on public awareness and brand recognition of the Trust*
- *use geomapping features on the redesigned website to promote the Trust's portfolio of properties*
- *work within established communication protocols — and collaboratively with the Deputy Minister's Office and Minister's Office and MCM Communications — to ensure that the minister is aware of, and can participate in, events and opportunities*

D. Research and analysis

The Trust is mandated to undertake research programs that highlight heritage conservation, protection and preservation. The Trust conducts research and analysis in many forms. This research supports our understanding of conservation across Ontario, provides a fuller understanding of our heritage and the events, people and activities that have shaped our province, including an

opportunity to better understand our assets and collections/holdings, while also providing vital information for decision-making and shapes policy and direction.

Here are a few other areas that highlight the impact of research and analysis at the Trust:

University research project partnerships

Project partnerships with university programs help us to undertake research to understand and respond to conservation issues at Trust properties, explore the complexity/nuance of commemoration, and introduce opportunities for identifying new stories to share with Ontarians.

The Trust works with numerous universities and colleges across the province to provide opportunities for students and emerging professionals to develop heritage-related skills. This is done through lectures, credit-for-project courses, work placements, internship opportunities and special research initiatives. As the post-secondary system continues to undergo transformation, with an increased focus on graduates possessing employment-ready experience, as well as navigating the impacts of AI tools on learning, the Trust is uniquely positioned to provide service-learning opportunities to address these challenges.

Corporate/annual financial reporting

The Trust also conducts research and analysis through the reporting of financial and non-financial data. These reports can take many forms, including audit reporting, financial reporting and corporate governance and responsibility reporting. Annual reports provide a general view of Trust data, including performance metrics, program updates and financial statements.

In 2025-26, we will:

- *analyze the Ontario Heritage Act Register to support our understanding of conservation trends across the province*
- *develop key performance indicators (KPIs) that demonstrate the economic, social and community value of the Trust as it delivers on its mandate*
- *review opportunities to improve usage of restricted funds*

E. Asset management

The Trust is empowered, through its legislated mandate, to hold property of heritage value on behalf of the people of Ontario. It is vital that these assets, and their associated information, are properly managed. We maintain inventories and databases to manage our heritage assets, helping to support heritage planning and management throughout the province. The Trust has developed a variety of online inventories and databases that serve as important conservation and planning tools. These tools support informed decision-making, specifically with respect to planning and development.

Holding cultural and natural heritage properties in trust

Conservation is at the core of the Trust's mandate. As a heritage conservation organization, managing lands and assets is an important responsibility. The Trust holds 192 properties in trust.

Collections management

Collections management is not just about basic inventory. It also encompasses information, preservation, movement, documentation, exhibitions and access. These areas of activity should be addressed for every collection — put simply, know what you have and where and how to find it. The Trust is home to approximately 25,000 cultural artifacts, over 1 million archaeological objects, and databases of provincial plaques, properties, cultural and archaeological artifact collections, and places of worship — all of which are important cultural and educational tools.

In 2025-26, we will:

- *implement an asset management system across the organization that incorporates long-range planning of the Trust's capital needs, including conservation, corporate infrastructure and business needs (for example, long-term rentals, short term rentals, visitor attractions, etc.)*
- *increase the number of artifacts available to the public (with descriptions and photographs) through our online database*
- *develop organizational policies that support the needs and interests of Indigenous peoples as rights-holders over their knowledge, intellectual property and heritage belongings*
- *support the provincial government in its efforts for growth, development and rebuilding the economy through the sustainable management of Trust properties and programs*
- *develop a plan to replace the First Parliament site lease revenues*
- *develop a plan for reuse of Rockwood Academy to generate cash-flow and support its conservation*
- *complete a comprehensive assessment of current uses of properties, management models, and cost/revenue analysis to identify opportunities for future use and management*
- *undertake a feasibility study for a collection storage facility for Trust cultural and archaeological collections to support long-term conservation goals*
- *develop an open data resource connection to the government's repository for the OHA Register linked on the Trust's website, including geomapping information, to provide greater usability for this planning tool*
- *modernize our land management and monitoring tools with technologies (such as drones and electronic data collection forms) to update our understanding of how these assets are changing over time*
- *refresh the OHA Register database infrastructure and public user interface to increase usability, accessibility and bring a customer-service-focused approach to this important provincial data set*

Internal corporate systems (finance, information technology, human resources and procurement)

From the administration of all funding, revenue records and cost items, to maintaining the technological infrastructure of the Trust, to recruitment, administration, compensation and benefits, training and development, to the acquisition of Trust goods and services, supplier relationships and inventory control — all internal corporate systems support the Trust's asset management program.

In 2025-26, we will:

- *seek opportunities to consolidate or eliminate redundant forms/documents/internal processes*
- *look for areas where we can streamline financial processes and, where possible, provide digital forms for ease of use and transparency of information*

- *explore the possibility of transferring Trust properties where there may be a more appropriate long-term steward, freeing up Trust capacity to concentrate on other assets*
- *continue to support the Centralization of Broader Real Estate Authority (CBREA) process by providing information, as requested; work with MCM to support implementation of legislative changes to OHA Part 2 resulting from CBREA*
- *continue to support the Community Jobs Initiative (CJI) by providing information, as requested*
- *seek funding to support capital work through the Ministry of Tourism, Culture and Gaming and Ministry of Sport's (MTCG) Repair and Rehabilitation program, the Parks Canada National Historic Site Cost-Sharing Program and identify and pursue other opportunities for capital funding, such as infrastructure funding programs and sponsorship*

F. Serving as a trusted heritage advisor in Ontario

As a reliable advisor for heritage in Ontario, the Trust advises and makes recommendations to the minister on any matter relating to the conservation, protection and preservation of the heritage of Ontario. We are a centre for expertise on the protection and conservation of significant heritage properties. The Trust has consistently supported government priorities. We have provided insight, expertise and advice to the ministry with respect to balancing sound heritage conservation practices with achieving key identified outcomes. Examples include:

- discussions and guidance directed to the conservation and commemoration of provincially significant heritage (including provincial plaques)
- advisement and guidance to the government on their environmental plan
- working across government to provide advice and support initiatives to promote inclusivity and a sense of belonging
- recommendations to the government on the recognition of veterans and military heritage
- support for the government's promotion of Francophone culture and the Trust's delivery of provincial plaques focused on the importance of Francophone culture in Ontario
- guidance related to the Ontario Heritage Act
- working with Metrolinx and the Ministry of Transportation on Interpretation and Commemoration Plans (ICPs) for Front and Parliament streets in downtown Toronto, and the associated community planning that will follow; this work is ongoing and being led by these bodies to bring greater awareness to this important site of provincial significance, which is Ontario's (then-Upper Canada's) first purpose-built parliament buildings, constructed in 1795
- providing advice and support to a government initiative to celebrate key moments in Ontario's history (Ministry of Education and Ministry of Citizenship and Multiculturalism)

Metrolinx and the First Parliament site

Related to the Trust's involvement in the First Parliament site (which the Trust owned until it was transferred to Metrolinx to facilitate the construction of the new Ontario Line subway), the Trust has been monitoring, and is involved with, several years of archaeological investigation at the site, all as part of the minister's consent related to this transfer. Following acceptance of the final archaeological reports, the archaeological collections from 2022-24 will be transferred to the Trust. Trust staff will then work to organize the collection and ensure that it is safely stored for future generations, while also providing for educational and promotional opportunities related to the artifacts.

Sharing expertise with heritage practitioners and local communities

The Trust also supports communities and community organizations by providing educational and technical advice on the conservation of Ontario's heritage by:

- building local awareness and capacity for heritage planning through the Heritage Planners Network, a community for heritage planners across Ontario
- promoting the adaptive reuse of heritage buildings to support increasing housing supply
- facilitating conservation solutions in communities across the province
- sharing research at conferences, workshops, presentations and seminars
- delivering two innovative youth-focused heritage symposiums (with funding support from Canada Life):
 - connecting emerging heritage professionals and enthusiasts at the post-secondary level with educational institutions to develop interests and skills in public history and heritage conservation
 - primary and/or secondary school student symposium coordinated by the Josiah Henson Museum of African-Canadian History with schools and other museums, focusing on providing students and teachers with the tools to create a more equitable and just society

OHA Register

The OHA Register features a searchable database that provides information about properties in Ontario that have been designated using the Ontario Heritage Act (OHA). Since the OHA was passed in 1975, municipalities have been legislated to send documents about designated properties under the Act. Information about designated properties from across the province is now kept in one place and is now available to the public on the OHA Register (see <https://www.heritagetrust.on.ca/register>).

Advising on the protection of easement properties

The Trust also helps to conserve properties it does not own through easements. An easement is a legal agreement between the property owner and the Trust that is registered on the title of a property. It establishes mutually accepted conditions that will ensure the conservation of a heritage property in perpetuity.

The Trust oversees 265 heritage conservation easements (comprising 69 natural heritage conservation easements and 196 cultural heritage conservation easements). The Trust collaborates with landowners regularly to ensure that they understand how easements work, while providing guidance and best practices on how to manage the heritage values on their properties. Landowners confer with Trust staff for approvals on requests to make changes to their properties that are in keeping with the properties' heritage values.

In 2025-26 we will:

- *implement the Red Tape Reduction proposal to streamline the release of parts of a heritage conservation easement from title when there are no heritage impacts*
- *shorten the time it takes for the Trust to respond to property owner requests*
- *try, test and learn from innovative adaptive reuse methods as they relate to heritage conservation projects, and share these insights with a wider audience*

- *use the Trust's main website and social media platforms to engage the public and stakeholders in dialogue on the protection and conservation of heritage properties; seek ways to share information on lessons learned more broadly*
- *provide information and analysis on the OHA Register and heritage sector trends, and work alongside MCM staff to support decision-making.*

6. PERFORMANCE MEASURES

The Ontario Heritage Trust aligns agency direction and operations with the government priorities of innovation, sustainability and accountability. In addition, the Trust's annual Letter of Direction from the ministry outlines priority areas specific to the Trust. These include:

- key services delivery
- Red Tape Regulatory Burden Reduction Initiative
- Doors Open Ontario
- in-person and virtual programming
- Provincial Plaque Program
- Ontario Heritage Act
- public events/communications
- economic growth and development
- Community Jobs Initiative, Centralization of Broader Real Estate Authority (CBREA)

PERFORMANCE INDICATOR	2024-25 YTD	2025-26 TARGETS
Effectively manage a portfolio of provincially significant heritage properties		
% of built properties fully utilized	54%	75%
Effectively protect a portfolio of provincially significant heritage properties		
% of asset replacement value spent on repairs and maintenance	1.3%	2%
% of asset replacement value spent on capital investment	TBD	2%
% of built properties with up-to-date building condition reports	58%	70%
% of easement alteration requests processed within the service standard	-	100%
Effectively promote a portfolio of provincially significant heritage properties		
# of total website visits	959,533	1,100,000
# of social media followers	35,804	40,000
# of social media impressions	24,135,000	25,000,000
# of social media engagements	84,110	290,000
# of media mentions	1,050	1,100
Doors Open Ontario (DOO)		
# of DOO events/communities participating in DOO (in-person)	29	30
# of faith-based groups & places of worship participating in DOO	100	105
# of in-person visitors to DOO sites (total)	434,000	455,000
# of website visits to DOO sites	471,684	500,000
# of media stories about DOO	162	175
# of Doors Open media stories that mention the OHT	140	150
In-person and virtual programming		
# total visitation (at all OHT visitor attractions)	-	60,000
Provincial Plaque Program		

# of new plaques unveiled	2	6
Ontario Heritage Act		
% of OHA Register transactions processed within the service standard	-	95%
Public Events/Communications		
# total of in-person special events	-	11
Economic growth and development		
\$ total economic impact of the OHT	\$11,800,000 (target)	\$12,000,000
OHT = revenue-generating agency		
\$ total of Business Centre revenues	\$1,941,591 (at the end of Q3, 2024-25)	\$4,088,752
\$ total raised from fundraising, sponsorships and partner funding	\$209,221	\$312,500
# of days the EWG theatre is occupied	314	315
# of days OHT venues are rented	574	575

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

7. INVESTMENT IN CONSERVATION

Summary of Board approvals to date for Investment in Conservation Fund
(to October 2, 2024)

	Investment in Conservation Fund (306) Board-restricted			Investment in Conservation Fund (616) Externally restricted		
	Lost Revenue Subfund (1)	Post-pandemic Sustainability of Partnerships Subfund (2)	COVID-19 Stabilization Subfund (3)	Acquisitions sub-fund (4)	Memorials at Residential Burial Areas Subfund (5)	TOTAL
Acquisition		\$50,000		\$1,489,000		\$1,539,000
Capital		\$3,895,000		\$302,500		\$4,197,500
GIS		\$40,000				\$40,000
Natural Heritage Baseline Documentation Reports				\$60,000		\$60,000
Operations	\$2,590,000		\$7,939,000			\$10,529,000
Plaques		\$348,000				\$348,000
Programming		\$60,000		\$200,000		\$260,000
Research		\$775,000				\$775,000
Communications		\$200,000				\$200,000
TOTAL	\$2,590,000	\$5,368,000	\$7,939,000	\$2,051,500		\$17,948,500

2025-26 expenditures from the Investment in Conservation Fund are covered in Section 8 — Capital Plan.

8. CAPITAL PLAN

The Trust will apply to the MTCG Repair and Rehabilitation program for funding in 2025-26. Below is a list of all capital projects to be undertaken in 2025 through 2028:

Property name	Project name	2025-26 Budget	2026-27 Forecast	2027-28 Forecast
Building conservation				
Ashbridge Estate	Restoration and repairs	-	-	\$ 250,000
Barnum House		-	-	\$ 250,000
Bethune-Thompson House	Outbuilding stabilization and repair	\$ 250,000	\$ 250,000	-
Duff Baby House exterior		-	-	\$ 250,000
Elgin & Winter Garden Theatres	Exterior restoration and repairs	\$ 500,000	\$ 500,000	\$ 500,000
Enoch Turner Schoolhouse		-	-	\$ 250,000
Fool's Paradise		-	-	\$ 250,000
Fulford Place		-	\$ 500,000	-
George Brown House		-	-	\$ 250,000
Glassco	Building stabilization and repairs	\$ 500,000	-	-
Homewood	Exterior restoration and repairs	\$ 500,000	-	\$ 250,000
Inge-Va	Exterior restoration	-	-	\$ 500,000
Josiah Henson Museum of African-Canadian History		-	\$ 500,000	-
Macdonnell-Williamson House	Exterior restoration and repairs	\$ 500,000	-	-
Mather-Walls House		-	\$ 250,000	-
McMartin House		-	\$ 250,000	-
Moose Factory buildings	Exterior restoration and repairs	\$ 250,000	-	\$ 250,000
Niagara Apothecary		-	\$ 250,000	-
Ontario Heritage Centre		-	\$ 500,000	-
Rockwood Academy	Outbuilding stabilization and repairs	\$ 500,000	\$ 500,000	\$ 500,000
Scotsdale Farm	Outbuilding stabilization and repairs	\$ 500,000	-	\$ 500,000
Sheppard's Bush	Exterior restoration and repairs	\$ 500,000	-	-
Sir Harry Oakes Chateau		-	\$ 500,000	-

Property name	Project name	2025-26 Budget	2026-27 Forecast	2027-28 Forecast
Wolford Chapel		-	-	-
Multiple sites	Exterior painting and base building repairs	\$ 500,000	\$ 500,000	\$ 500,000
Multiple sites (AODA)	Accessibility upgrades	\$ 250,000	\$ 250,000	\$ 250,000
Sub-total for Building conservation		\$4,750,000	\$4,750,000	\$4,750,000
Natural heritage conservation				
Cheltenham Badlands	Accessibility upgrades and Master Plan projects	\$300,000	\$550,000	\$300,000
Ellis	Trail enhancements with signs	-	\$850,000	\$1,400,000
Fleetwood Creek	Dog-strangling vine chemical control	\$5,000	\$5,000	\$5,000
Glassco	Outbuilding repairs and demolitions	\$100,000	\$200,000	\$200,000
Hope Smith	Encroachment fencing and sign installation; restoration work	\$20,000	\$10,000	-
Fool's Paradise	Pond re-naturalization and bank stabilization	\$40,000	-	-
Minhinnick	Trail sign creation and installation	\$2,500	-	-
Nochemowenaing	Hunter Court restoration	\$50,000	-	-
Scotsdale Farm	Implement management plan and investigate parking system	\$6,000	\$150,000	\$500
Wright	Encroachment fencing	\$5,000	-	-
Sub-total for Natural heritage conservation		\$528,500	\$1,765,000	\$1,905,500
Collections				
Collections storage facility feasibility study		\$100,000	*TBD	*TBD

Property name	Project name	2025-26 Budget	2026-27 Forecast	2027-28 Forecast
Sub-total for Collections		\$100,000		
Visitor attractions				
Josiah Henson Museum of African-Canadian History	Collection storage facility feasibility study	-	\$100,000	-
Sub-total for Visitor attractions		-	\$100,000	-
Heritage Rental Venues				
Ontario Heritage Centre	Flooring replacement, repainting, AV upgrade, kitchen and washroom upgrades	\$45,000	\$200,000	\$100,000
Enoch Turner Schoolhouse	Flooring replacement, repainting, AV upgrade, washroom upgrade and landscaping	\$50,000	\$200,000	\$150,000
Sub-total for Heritage Venues		\$95,000	\$400,000	\$250,000
IT infrastructure				
Multiple projects/ Multiple sites	Information technology investments	\$300,000	\$350,000	\$200,000
Sub-total for IT infrastructure		\$300,000	\$350,000	\$200,000
Elgin & Winter Garden Theatres (theatre business)				
Elgin & Winter Garden Theatres	Theatrical lighting upgrade	\$515,000	\$500,000	
Elgin & Winter Garden Theatres	Elgin chandelier project (lighting improvement)	\$100,000	*TBD	-
Elgin & Winter Garden Theatres	Wayfinding (AODA and patron experience)	\$50,000	-	-
Elgin & Winter Garden Theatres	Elgin stage floor replacement	-	*TBD	-
Elgin & Winter Garden Theatres	Winter Garden stage floor replacement	-	*TBD	-

Property name	Project name	2025-26 Budget	2026-27 Forecast	2027-28 Forecast
Elgin & Winter Garden Theatres	Winter Garden fire curtain motor replacement	-	-	\$40,000
Elgin & Winter Garden Theatres	Fall protection system	\$20,500	-	-
Sub-total for Elgin & Winter Garden Theatres		\$685,500	\$500,000+	\$40,000
OVERALL TOTAL		\$6,459,000	\$7,865,000	\$7,145,500

**Note - Project funding is contingent on capital work that is completed in 2025-26.*

Revenue source	2025-26 Budget	2026-27 Forecast	2027-28 Forecast
2025 Parks Canada — National Cost Sharing Program for Heritage Places (NCSPHP) program funding application	\$500,000		
EWG Business Development (Fund 215)	\$70,500		\$40,000
EWG Centennial (Fund 603)	\$50,000		
EWG Donations (Fund 280)	\$50,000		
Fund 460	\$95,000		
Donations	\$58,000	\$59,160	\$60,343
Sponsorship & Partnership Funding	\$254,500	\$1,340,840	\$1,639,657
Investment in Conservation Fund — Conservation/Modernization/Partnership Stabilization Sub-fund (Fund 306)	\$675,000	\$765,000	\$5,000
MTCG Repair and Rehabilitation program	\$4,650,000	\$5,300,000	\$5,400,000
Nochemowenaing (Fund 560)	\$50,000		
Scotsdale bequest (Fund 200)	\$6,000		\$500
TBD – The Trust will determine the appropriate revenue source in fiscal year 2025-26 to address this shortfall in 2026-27.		\$400,000	
TOTAL	\$6,459,000	\$7,865,000	\$7,145,500

9. FINANCIAL ASSUMPTIONS

Revenue:

MCM operating grant — The annual operating grant from MCM is expected to remain at the 2023-24 level of \$3,809,300. The annual contribution of \$20,000 for the Premiers' Gravesites Program is expected (as set out in the MOU for this program).

Other ministry grants

The Trust can support student employment. The budget is based on recent ministry allocations of five summer students, equalling \$27,000.

Provincial grants

The Trust has an agreement with the Ministry of Francophone Affairs, under the Canada-Ontario Agreement on Minority Language Services (2023-28), for funding of \$32,000.

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

Federal grants

Young Canada Works student funding is anticipated at \$25,000.

Fundraising and sponsorship

The target is to raise \$312,500 from donations, corporate sponsorships, events and community partner contributions.

Sponsorships from RBC for the Doris McCarthy Artist-in-Residence Program (\$60,000) and RBC for Emancipation Day are in approvals for the year. Currently, sponsorship from Canada Life for the Youth Strategy (\$75,000) is approved.

Business revenue

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

Long-term lease rentals

Income from commercial, not-for-profit and residential leases are expected to increase slightly this year. Vacancy rates are to remain consistent. On average, commercial leases will increase 3 per cent, and residential leases 2.5 per cent in 2025-26.

Short-term licenses

Revenue from renting heritage spaces for special events (including weddings) is expected to continue to grow. Corporate meetings have not recovered from pre-pandemic levels to this point and are expected to continue to generate minimal revenue.

Rentals for film locations and activities are projected to continue to be strong. Total revenue is projected to increase 3.5 per cent to \$513,000.

Anticipated revenues at the Elgin & Winter Garden Theatres are expected to decrease from 2024-25 by 10 per cent to \$2.99M.

Investment income

Investment is estimated to generate \$3,000,000. Investment returns are significantly impacted by the volatility of financial markets, including escalating interest and uncertain equity and bond markets that will impact investment returns. Returns will also be impacted by diminishing fund balances, as 2025-26 expenditure commitments are realized.

Programming income

It is anticipated that the museums' and gift shops' income will increase 21 per cent in 2025-26. The Cheltenham Badlands opened in 2024-25 and is anticipated to bring in an additional \$218,000 annually.

Expenditures:

Salary and benefits expenses

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

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

Operating and program delivery expenses:

Business centre operations

The EWG's direct operating expenses are flow-through expenses and are expected to increase; they are recovered through receivables from the venue licensee. The Heritage Rental Venues direct operating expenses are flow-through expenses and are expected to decrease 14 per cent because of lean processing initiatives.

Property portfolio management

This includes expenses such as utilities, building systems maintenance and repairs, general property management, maintenance of infrastructure and visitor amenities and realty taxes required for upkeep and stewarding the Trust's portfolio of cultural and natural heritage properties. Increased public activity at Trust sites requires increased levels of upkeep and maintenance, resulting in a 7 per cent increase in the budget.

Program delivery

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

Board-restricted investment in conservation (Fund 306)

The Board-restricted budget supports work to address the development of new operating models and partnerships, older provincial plaques (for replacement or repositioning, including outdated language and terminology), and funds to offset base rent at the First Parliament site until 2034. It is anticipated that \$3,900,000 will be spent in 2025-26.

Externally restricted investment in conservation (Fund 616)

The externally restricted budget supports work to address continued implementation of the Strategic Acquisitions Plan, and work to support the commitment related to commemorating Residential School burial areas. No expenses are expected in 2025-26.

Operating surplus/(deficit):

The Trust's operating budget is forecasted to result in a surplus of approximately \$219,862 in the general fund and a combined deficit (all funds) of (\$2,678,081), including planned use of restricted funds.

10. BUDGET AND TWO-YEAR FINANCIAL OUTLOOK

BUDGET AND TWO-YEAR FINANCIAL OUTLOOK

ONTARIO HERITAGE TRUST OPERATING FINANCIALS	2024-25	2025-26			2026-27	2027-28
	Budget	Forecast			Forecast	Forecast
	COMBINED	GENERAL FUND FORECAST	RESTRICTED FUND FORECAST	COMBINED	COMBINED	COMBINED
REVENUE						
OPERATING GRANT	3,829,300	3,809,300	20,000	3,829,300	3,829,300	3,829,300
- MCM Operating grant	3,809,300	3,809,300		3,809,300	3,809,300	3,809,300
- MCM Premiers' Gravesite Program (maintenance)	20,000		20,000	20,000	20,000	20,000
OTHER MINISTRY GRANTS	20,000	27,000	0	27,000	27,000	27,000
- MCM SEP; Summer student funding	20,000	27,000		27,000	27,000	27,000
PROVINCIAL GRANTS	35,000	0	67,000	67,000	52,000	67,000
FEDERAL GRANTS	31,000	25,000	0	25,000	25,000	25,000
FUNDRAISING, SPONSORSHIPS and PARTNER FUNDING	579,000	58,000	254,500	312,500	313,660	314,843
-Donors	95,000	-	-	58,000	59,160	60,343
-Sponsorship & Partnership Funding	484,000	-	-	254,500	254,500	254,500
BUSINESS CENTRE INCOME	4,383,000	4,088,752	0	4,088,752	4,170,527	4,253,938
INVESTMENT INCOME	2,500,000	1,170,000	1,830,000	3,000,000	2,940,000	2,881,200
PROGRAMMING INCOME	100,000	304,816	0	304,816	310,913	317,131
TOTAL REVENUE	11,477,300	9,482,868	2,171,500	11,654,368	11,668,400	11,715,412

EXPENDITURES	2024-25 Budget	2025-26 Forecast			2026-27 Forecast	2027-28 Forecast
SALARIES and BENEFITS	7,636,539	6,379,873	285,000	6,664,873	6,792,470	6,922,620
BUSINESS CENTRES	600,000	1,476,550	-	1,476,550	1,506,081	1,536,203
PROPERTY MANAGEMENT	2,274,912	2,433,625	-	2,433,625	2,482,297	2,531,943
PROGRAMMING/SUPPORT DELIVERY	2,247,312	1,202,959	684,850	1,887,809	1,911,868	1,784,309
INVESTMENT PORTFOLIO MANAGEMENT FEE	105,000	120,000	180,000	300,000	300,000	300,000
INVESTMENT IN CONSERVATION	5,417,000	(2,350,000)	3,919,592	1,569,592	1,300,000	1,200,000
TOTAL EXPENDITURES	18,280,763	9,263,006	5,069,442	14,332,449	14,292,716	14,275,075
Operating Surplus/(Deficit):	(6,803,463)	219,862	(2,897,942)	(2,678,081)	(2,624,316)	(2,559,663)

Notes:

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

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

11. HUMAN RESOURCES (HR) AND STAFFING

Staff representation (as of January 28, 2025)

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

Staffing Report

Staffing	As of January 2025
Number of Regular staff	52
Number of Fixed-term staff	4
Number of Part-time staff	0
Staffing in process	2
Total staff strength	58

Over the upcoming three years, the Trust's HR Plan aims to:

- comply with OPS directives and policies on human resources and labour relations to maximize organizational capacity and enhance public service delivery
- acquire the necessary expertise and experience to fulfill its extensive mandate and legislative responsibilities under the Ontario Heritage Act, and to successfully implement the Business Plan
- identify and secure the skills and knowledge required to support the Board's governance and accountability functions effectively
- adhere to the OPS Multi-Year Accessibility Plan and the MCM Anti-Racism Action Plan by fostering a diverse, inclusive and equitable workplace that promotes accessibility and anti-racism

The Trust regularly assesses its organizational structure, which includes 58 FTE positions, to ensure that its operational programming and staffing align with its goals and objectives.

The government freeze on hiring for non-essential frontline services remains in place. Requests for exemptions for permanent or external hires are submitted to the Deputy Minister in accordance with the Ministry's Human Resources Delegation of Authority.

Once approvals are granted, the Trust will address staffing needs through recruitment activities, including internal and external competitions, to build capacity and fill critical positions, both permanent and temporary, across its branches. The Trust requires staff with specialized skills in fields such as archaeology, cultural heritage, natural heritage and easement properties.

External recruitment will enable the Trust to attract talent with the expertise needed to conserve and preserve Ontario's heritage. This approach aims to diversify the candidate pool by including under-represented groups such as Indigenous, Black and racialized individuals, Francophone persons, people with disabilities, and 2SLGBTQIA+ individuals.

This strategy aligns with broader OPS-wide commitments to help employees "grow, perform and succeed," and supports specific MCM priorities, which include:

- promoting equitable economic growth and opportunity for all Ontarians
- leading the government's anti-racism and anti-hate initiatives
- fostering inclusive, vibrant communities while preserving Ontario's heritage

12. MARKETING AND COMMUNICATIONS STRATEGY

Priorities

Following record-breaking website visitation in 2024-25, the Trust's Marketing and Communications strategy will continue to build and develop our diverse audiences, supported by a brand-new corporate website — to include revised copy, new tools and new online exhibits. The website project was prefaced by a user experience audit in 2023-24, which has informed some of these changes. Record web visitation, alongside a growing social media base of followers and subscribers, provides new opportunities to enrich and develop our audience in 2025-26 and further raise awareness of the Trust's connection with its programs. Partnering this web refresh with a social media brand update will contribute to continued growth and higher engagement in our social channels, newsletter subscriptions, programming and website visitation. These refreshes will be supported by new photo and video assets of our sites in all seasons to support creative organic and paid digital, social and out-of-home advertising, specifically focusing on hero images as well as people actively enjoying and using our sites. A DOO website user experience audit is also planned for 2025-26 following the successful insights gleaned through this process for the corporate site. This work will support the delivery of key Trust and ministry goals.

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

Focus on digital marketing

The Trust will engage digital marketing and program delivery through earned and paid social media, targeted e-blasts and online advertising to direct visitors to our DOO and corporate websites. The Trust will continue to deploy ongoing digital marketing strategies to reach new and diverse audiences effectively in the years to come, both for digital and in-person programming.

Rollout of this strategic approach will continue in 2025-26 as digital marketing allows us to use the most effective tools and methods to track statistics on web traffic, which assists us to measure the effectiveness of the Trust's message. Using insights gleaned from digital marketing, the Trust will continue to hone advertising and communications strategies and tactics to engage new audiences, understand their needs, and produce the variety and quality of content to which they optimally respond. The Trust is committed to providing audiences with enriching experiences in every interaction.

Strengthen social media

The Trust has experienced steady growth and strong engagement across its social media channels. The Trust will continue to maintain a presence on Facebook, X, Instagram, YouTube and LinkedIn. In 2025-26, the Trust will focus on delivering focused, engaging content that is tailored to the nuances of each social media channel and demographic.

Content will consist of a mix of organic posts, paid posts and cross-posting with partner organizations to expand the reach and impact of our messages, while continuing to grow our following. The Trust will continue to work with influencers to promote programs, including Doors Open Ontario, following the success of the last two campaigns.

Strengthen brand awareness

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

The Trust will continue to strengthen its brand across all communications in 2025-26, establishing a recognizable link between the Trust's programs, events and venues, including email marketing, Doors Open Ontario, Trust-owned and -operated museums, advertising, fundraising initiatives and day-to-day communications.

Tell Ontario's heritage stories

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

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

- promotes events, including Doors Open Ontario
- shares new and interesting perspectives on the work we do
- positions the Trust as a leader and key partner in the heritage sector
- highlights best-practice models of adaptive reuse of heritage buildings and older building stock
- builds credibility and authority for the Trust
- builds brand awareness for the Trust
- shares the province's diverse stories
- develops loyalty to the organization among our supporters
- presents focused and curated opportunities for the public to make donations from across the country in support of the Trust's work
- highlights the contributions that corporate sponsors make to the Trust
- continues to provide tailored social media content to increase engagement, followers, newsletter subscribers and to drive traffic to our websites

By collaborating with experts within the Trust and beyond (including via fresh content for *Heritage Matters* e-magazine), our content will provide an impassioned and informed perspective that will help to deliver the Trust's mandate and drive conversations within the heritage sector while entertaining and educating our audiences.

Public communications

The Trust's Marketing and Communications team maintains the Trust's brand and presence, both internally and externally (including the delivery and promotion of various Trust programs and activities to the public). The team plays a crucial role in promoting the Trust's online presence (including the Trust websites and social media channels), raising awareness, engaging the public, supporting revenue generation and collaborating with stakeholders. Examples of public communication tools include social media channels (Facebook for both the Trust and the EWG, Instagram, LinkedIn, X/Twitter and YouTube); the corporate website; the Doors Open Ontario website; the Heritage Matters e-magazine website, the EWG subsite; and the bimonthly newsletter

Heritage Matters ... *more!*

These projects and the Trust's many communications tools all strengthen the connection between the work of the Trust and how heritage is experienced by the public.

Coming out of the Trust's work with Metrolinx and Infrastructure Ontario on the First Parliament site, the Trust will be launching a new digital exhibit that focuses on the archaeological work of this significant site over the past 24 years, while placing that work within the site's broader history and context. With Metrolinx, the Trust has documented the site's extensive archaeology excavation and has produced 12 new videos as part of a multimedia public exhibit that will be shared with the public in 2025-26.

In 2025-26, projects supporting innovation, sustainability and accountability relating to conserving heritage assets will include:

- a social media brand refresh
- updated and diverse photo and video assets of sites and programs
- a refreshed corporate website
- a new First Parliament site digital exhibit
- a DOO website user experience audit

13. RISK CHART

Provincial agency: Ontario Heritage Trust				
Key information	Risk description	Risk management plan	Status of management plan	Risk rating/score
Risk title Potential for disruption of operations at the Elgin & Winter Garden Theatres (EWG) due to Metrolinx Ontario Line construction	Disruptions from the nearby construction of Metrolinx's Ontario Line will negatively impact programming and revenue at the Trust's Elgin & Winter Garden Theatres. The Ontario Line construction may also cause periodic outages of utilities (electricity, water), which may make the building unoccupiable, and of other essential services (for example, internet), which will impact business performance.	EWG mitigates risks as they arise, while carrying on with "business-as-usual" Have engaged with Metrolinx to identify potential risks to the EWG and possible remedies	A Trust-Metrolinx agreement was negotiated, signed and fully executed in Q3, 2023-24 EWG staff monitor the construction schedules and meet with the Metrolinx team monthly for updates on road access and work progress	Residual impact 5 — Critical
Category Operational-Financial				Residual likelihood 3 — Possibly
Age of risk Q1/2021-22 Timeframe to manage down Ongoing Speed of onset Immediate on start of construction	Potential disruptions may also include: <ul style="list-style-type: none"> reduced access to streets and neighbourhood parking lots for patrons Disruption risks expected to last for the duration of the construction project (with an anticipated timeline of 7-10 years)			Residual risk (Total risk rating/score) 15 — Medium-High

Provincial agency: Ontario Heritage Trust				
Key information	Risk description	Risk management plan	Status of management plan	Risk rating/score
Risk title The Trust is unable to deliver on its stewardship role to protect and conserve its physical assets	At present, the amount of deferred maintenance on the Trust's property portfolio is estimated to be \$80M. This amount of deferred maintenance is a risk to the long-term conservation of the properties held by the Trust for conservation purposes.	In 2024-25, the Trust committed \$4.35M for capital repairs and rehabilitations. \$12M is projected to be committed in the Trust's three-year capital outlook. The Trust is drawing funds from the Investment in Conservation Fund to augment funding from the MTCG Repair and Rehabilitation program.	Active (the 2024-25 capital projects are underway, as of this writing)	Residual impact 4 — Major
Category Operational-Program Design/Delivery				Residual likelihood 3 — Possibly
Age of risk Q3/2019-20 Timeframe to manage down Ongoing Speed of onset Consistent				Residual risk (Total risk rating/score) 12 — Medium