



**The Parkwood Foundation**  
**2024 Budget and Business Plan**

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**Prepared for: The City of Oshawa**  
**October 2023**



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The Parkwood Foundation would like, once again this year, to extend our utmost appreciation to the City of Oshawa, Council and the staff, for continuing to support this treasured National Historic Site with ongoing annual operating grants. This document outlines our accomplishments from the past year and our upcoming plans for 2024. The past year we have seen some new and different challenges as we distance ourselves from the pandemic. While guests seem to be more comfortable with indoor events, and being amongst others, more options have opened up for people that involve travelling, so competition is fierce for the tourism dollar. Our goal as it has been for the past few years, was to continue to provide a wide array of events that appeal to a diverse population, reflective of our community in a way that provides an exceptional visitor experience, access to our grounds, and drive revenue to continue to invest in our asset. As always, it is very important to us that we continue to ensure our grounds were accessible to the community for their amazing mental health benefits, a place where people can reset and recharge for a few hours.

As our lead benefactor, the City of Oshawa is demonstrating its commitment to the legacy of R.S. McLaughlin. We are requesting continued support in the amount of a \$325,000 operating grant for 2024.

## Vision and Mission Statement

The purpose of The Parkwood Foundation is to preserve the Parkwood Estate, and to operate this national historic site as a museum and heritage garden for the education and enjoyment of all Canadians and visitors, and to foster an understanding and appreciation of Parkwood's architectural and landscape architectural features, its collection of art and furniture, and of the life, times and accomplishments of R. S. McLaughlin one of Canada's foremost industrialists and philanthropists.

## Internal Positioning Statement

Parkwood National Historic Site is the destination for unique experience seekers. It is an immersive and enchanting marvel for the entire family. Parkwood believes every guest should leave experientially satiated by its exclusive combination of distinctive events and dining, lush magnificence, meticulously preserved heritage, curated tours and prolific Canadian auto-baron history. Parkwood is a memory worth revisiting.

## Tagline

Experience Extraordinary

## Service Description and Client Identification

Parkwood National Historic Site and Gardens exists to celebrate the social history of the 20<sup>th</sup> century and is primarily a Museum and Tourism entity, open to the public to fulfill social, cultural, and educational objectives for our community and beyond.

## 2023 Accomplishments

We were very excited to start the year beginning to do work demanded by our new 5-year strategic plan. This plan was developed in consultation with the Board of Directors, and an external facilitator. This new plan continues to support change that is robust, engaging and contains a strong focus on continuing to support Oshawa and Durham Region as a vital social, economic, and cultural force. We have worked hard at the board level to establish metrics and prioritizing actions, which we began working through in 2023.



### Strategic Pillar #1: Community Impact

Parkwood aims to become the indispensable connective tissue that keeps the Durham community together. We need to create a plan to deepen our relationships, engagement and impact within the community, in turn increasing the sustainability of Parkwood. The key goals we are working towards under this pillar are;

1. Increased Reach of 10% in visitors each year on tours and through event participation
2. Enhanced Community Relationships
3. Corporate Alignment

### Parkwood Tourism & Programming

With the increased awareness we have been receiving, Parkwood was ready with an extensive line up of exciting programs and events for our guests. . Our goal is always to provide a first-class experience, drive revenue and keep up our relevance as a hub within the community. With over **105** workshops and **4** marquis events, we were delighted to see so many guests on the property, including numerous new visitors from the Toronto and surrounding regions. Whether it was a golf tournament, the annual Gala Dinner, Beer Fest, Wine & Chocolate, String Art, Markets on the Lawn, Paint Night in the Formal Garden, Mother’s Day or Christmas teas in the mansion, picnics on the lawn, fall planter workshops, stained glass, Whiskey & Charcuterie, or a cooking in the kitchen event, there was a reason for everyone to visit Parkwood multiple times!

**We are thrilled that participation in our 2023 event schedule increased by 54% over 2022.**

## Specialty Tours

We achieved our goal of offering 8 specialty tours, with a different one being offered every other month. This goal of these tours is to tell our stories, and provide multiple opportunities for guests to visit over and over again.

**We are proud to say that our numbers of visitors on tours have increased by 122% over 2019 pre-pandemic levels.**

- Parkwood Behind the Scenes, Movie Tours
- Basement Tours
- Servants Tours
- Christmas Tours
- Greenhouse Tours
- Private Spaces Tours
- World War II Tours
- Garden Tours

## Community Partnerships

Parkwood continued to participate in quarterly meetings with local ED's in the Oshawa community looking at new ways to partner and support one another. In addition, we have become a member of a Durham wide ED Group that is working to promote inclusion and participation by Durham residents in local charities.

In partnership with the Oshawa Museum, we hosted an event at Union Cemetery to tell the stories of the men and women buried in the Soldiers' plots.

In partnership with Branch 43 of the Royal Canadian Legion and the Commonwealth War Graves Commission, Parkwood assumed the role of observing the condition and preserving the soldiers' headstones and plots at Union Cemetery. The plots and headstones were gifted to the Veterans by George & R.S. McLaughlin.

Parkwood is proud to enter its 5<sup>th</sup> year working with the Durham Master Gardeners and the Oshawa Garden Club, to continue to evolve and deepen the historical significance of gardens.

In addition to strengthening the above relationships, our focus moving forward is to deepen relationships with Parks Canada, the Ministry of Heritage & Culture, Lakeridge Health and General Motors Canada.

## Strategic Pillar #2: Visitor Engagement

Parkwood needs to become the hub of the Durham Region. We strive to become the destination of choice, providing excellent customer service, enhanced accessibility and top of mind awareness for a WOW experience. In 2023 here are some of the objectives we accomplished.

Visitor Mapping: This year we gathered our staff and volunteers together to complete the involved process of Visitor Mapping. The purpose was not only to gain the perspective of our visitors, but to understand what we are doing well and what areas may need improvement. Through this session we gained a great deal of new ideas and learnings that we can integrate into our daily operations.

As we celebrated our milestone Centennial from Sept. 2017-2018, we were proud to roll out our 100<sup>th</sup> anniversary logo. This new logo informed our Centennial collateral materials, and was used as the starting point for our 2019 rebranding campaign.

- Recently, the Board of Directors underwent a strategy session with a Marketing firm that was working with us to better understand our new brand identity which included who we are, who we want to be, and how we should market and speak to potential visitors, and how we want our brand to feel. This process involved a competitive review, market analysis, key stakeholder interviews, onsite sessions and relevance testing. In the end our results were the following:

**BRAND PERSONALITY:** Warm & welcoming, knowledgeable, playful, smart, authentic, integrity

Stage 2 of this process, included a new logo, the creation of a new tagline and a rewrite of our website copy/images to be more in line with our new brand identity/feel. As we celebrated our milestone Centennial from Sept. 2017-2018, we were proud to roll out our 100<sup>th</sup> anniversary logo. This new logo informed our Centennial collateral materials, and was used as the starting point for our 2019 rebranding campaign.

- In January of 2020 the Board of Directors underwent a strategy session with a Marketing firm that was working with us to better understand our new brand identity which included who we are, who we want to be, and how we should market and speak to potential visitors, and how we want our brand to feel. This process involved a competitive review, market analysis, key stakeholder interviews, onsite sessions and relevance testing. In the end our results were the following:
- During the shut-down we moved into stage 2 of this process, and sent out RPF's to several local marketing firms for three projects; the creation of a **new logo, the**

**creation of a new tagline and a rewrite of our website copy/images** to be more in line with our new brand identity/feel. We were thrilled to complete the process of identifying our new core values and tagline, and more importantly our new LOGO which we rolled out in the summer of 2023.

The final step of this process is to develop the RFP to develop a new website.

**CORE VALUES:** Integrity, Heritage, Authenticity, Quality, Community

**TAGLINE:** EXPERIENCE EXTRAORDINARY

- We continued investing in **Search Engine Optimization (SEO)** to ensure that Parkwood is front and centre on all social media platforms internally through Facebook, Instagram, Google Business, etc. and that our business information on over 30 external sites (google business, Yelp, etc.) is always accurate and up-to-date. This project will also endeavour to ensure we are found when individuals search for key information online (weddings, venue rentals, museums, historic homes, gardens, things to do in Oshawa, etc.)
  
- ***Parkwood went viral in 2023!***  
With profiles written by Blog TO, Narcity Toronto, Narcity Quebec, TODO Toronto, Date night Toronto, Tik Tok, and multiple social media influencers, Parkwood's presence exploded online with over 1.4 million views on Parkwood in a one-month period this summer!
- We developed a strategy for our social media channels which included adding a Digital Media Coordinator to our team, to help us grow to the next level.
- Our Instagram took a tremendous leap forward (based on our strategy and saw us increase from 1,000 followers in 2019 to over 17,000 followers in 2023).
- We established an Instagram account for our Gift Shop, that has gathered a small following of 1,480 people in its first year.
- We are proud and honoured that Parkwood received several awards in 2023:  
***Clarington Readers Choice Awards***
  - Diamond Award for Best Day Trip Destination
  - Diamond Award for Best Museum
  - Diamond Award for Restaurant with a View  
***Oshawa/Whitby Readers Choice Awards***
  - Diamond Award for Best Day Trip Destination
  - Diamond Award for Best Museum
  - Diamond Award for Best Local Tourist Attraction
  - Diamond Award for Wedding Facility/Venue

- Diamond Award for Restaurant with a View

***Oshawa Chamber of Commerce - Tourism Operator of the Year.***

Parkwood was nominated and has made it to the final round of two. This award will be announced after this report was submitted. (fingers crossed) The Tourism Operator of the Year Award recognizes outstanding achievements and excellence in the tourism industry. The Tourism Operator of the Year is distinguished by exceptional tourism operators in terms of innovation, customer satisfaction, sustainability, business performance, leadership, employee welfare, marketing, and safety.

- 4.6-star review on **Google reviews** (over 932 reviews)
- #2 rated on **Trip Advisor** “Things to do in Oshawa”, and rated 4.5 out of 446 reviews
- One of the **Threebestrated.ca** landmarks in Oshawa with a 5-star review for the 6<sup>th</sup> year in a row
- In order to continue to find ways to allow visitors to our Gift Shop the best experience possible, we re-designed and re0built our online store. This will allow visitors a much more user friendly and engaging experience whether they are shopping online or in-person. Our team members continued to receive enhanced customer service and conflict resolution training as a way to ensure that on a regular basis we are providing excellent service to our visitors representing Parkwood and the City of Oshawa in the best possible manner.
- In 2024 the focus for the Marketing Committee will continue to be:
  - The creation of a more strategic approach to address advertising campaigns and to drive traffic which will include specialty tours, programming and fundraising events, especially as it relates the changing demographics of Oshawa.
  - The creation of metrics by which we can measure the success of these campaigns to ensure we are investing appropriately and seeing positive results.
  - Utilizing GEO on social media to capture traffic from surrounding areas and visitors to the hospital
  - The continued implementation of SEO and investing in SEM, and possibly Google Search Ads if we can secure a google grant.
  - Increased presence online for the Parkwood Gift Shop to drive traffic to the shop (in person and online)
  - Updated signage on the property, with our new logo and brand personality reflected.
- As a way to engage youth and connect to the community we coordinated several summer youth volunteer days with over 500 hours being donated
- **Inclusiveness & Accessibility:**



To ensure Parkwood is more inclusive and accessible we had scheduled a series of meetings with a consulting firm to determine ways in which Parkwood can be more accessible to those with physical challenges, language barriers, and more. We have had recently established an Accessibility Committee whose focus will be to identify, short-term, mid-term and long-term list of things we need to do to make Parkwood more accessible. (barrier accessibility, a tour in sign language on an iPad for those with hearing challenges. tours in several languages, Deaf Awareness Day, Low Sensory Awareness day, Mental Health Awareness day, etc.) We will continue to work with Accessibility Canada and the Accessibility of the City of Oshawa, so we can become more aware of accessibility challenges.

2022 presented many interactions for our team with members of the public who were struggling with mental health challenges. This led us to multiple conversations with Ontario Shores with the end focus of hosting a two-day, in-depth mental health first-aid training for our entire team in early 2023.

- In 2024, we hope to find enough funding to develop an app for our gardens to tell the amazing story of the historic grounds in a way that would be accessible to all visitors with historic photos, images and stories.

### **Strategic Pillar #3: Team Experience**

Our volunteers and team are the cornerstone of Parkwood's success. We need to provide an open, inclusive, non-discriminatory workplace where every team member feels valued and heard, and can feel connected to the team and to the organization while continuing to develop and contribute with pride. We have made this a strong focus for the past few years, however in 2024 we are making this pillar a strong focus to ensure our success into the future. Our goals for 2024 include:

- The continued creation of a fun and safe environment for our team
- Developing opportunities for 3 key learnings for each of the team members
- Create a comprehensive Volunteer Recruitment, Retention and Orientation strategy
- Create a team compensation philosophy
- Enhance opportunities for employee feedback to help measure satisfaction
- Succession planning strategies

An additional focus in 2023 was the addition of 2 HRPAs professionals to our HR Committee, and we are pleased to have achieved that goal!

### **Strategic Pillar #4: Continuous Improvement**

Our PPP Committee took a deep look into the projects that have been completed after the past few years, and completed an overhaul of our long-range **Master Capital Plan** that prioritizes and sequences key investments in capital projects and assets as well as projected maintenance. This is an organic document, fluid in nature and will evolve and develop further as we continue to utilize it on an ongoing basis. This plan has been instrumental in keeping us focused on completing deferred maintenance and the ongoing maintenance needs of Parkwood. Some highlights of the 2023 Projects:

- Extra support in the garden for needed root feeding, mulch, tree pruning, etc.
- Painting maintenance in the house
- Updating more grounds equipment to electric
- Chiller maintenance and repair
- Working with the Durham Master Gardeners and the Oshawa Garden Club, we continued the restoration of the large tennis court gardens back to their historic intent and plantings
- Installation of two historic 180-foot garden beds that flank the formal garden fountain. These were originally part of property, but were removed in the early 1980's
- Two additional Backflow preventers installed in the Pump House
- Changes to the irrigation system to include the new 180-foot garden beds
- Continued masonry work around the grounds
- Conservation of 5 of the family portraits that hang in the Dining Room
- Repair soffit, fascia and tiles on additional roof areas where animals have caused damage
- New dishwasher for the Tea House
- Maintenance and glazing work on the Vinery Greenhouse
- Enhanced pest control at the Tea House to attempt to address the ongoing wasp problems at the Tea House in late summer
- Lock Service & cleaning on several of the historic locks on the inner doors in the mansion
- Digitization of over 1,000 blueprints
- Air quality testing of the Art Gallery space, in preparation for interpretation
- New fire panel installed to ensure best possible monitoring and response
- 4 new flat roofs installed on the mansion (Palm tree house, bowling alley, swimming pool, squash court areas)
- Extensive arbour work on the grounds
- Extensive repairs to 100-year old pipes from the basement to the south lawn to address broken clay pipes and flooding issues

2024 will see the continuation of investing in Parkwood to ensure its sustainability, viability and guest experience. Stay tuned to see what happens next year!

### *Capital Projects*

In the past 6 years Parkwood has invested over \$840,000 in our asset infrastructure, with the goal of ensuring sustainability, and legacy. It is important that we ensure Parkwood is here for

another 100 years for our visitors to enjoy, and it is equally important that they enjoy their visit to Parkwood as a first-class destination. We still have work to do to invest in preserving and conserving the Estate but we continue to push forward and strategize ways for funding to ensure this is possible!

### **Strategic Pillar #5: Financial Sustainability**

Sustainability through diversity is vital to a successful future for Parkwood and we will continue to be dedicated to addressing a solid plan to continue to grow. (philanthropy, individual giving, earned revenue, foundation grants, sponsorships, events, and a supporting social media plan)

**Parkwood Studios** 2023 was another successful year for Parkwood in terms of film activity. Continuing to be as receptive as possible to the film community, we were able to secure several productions. In 2023 we welcomed 4 productions, that spent 69 days onsite in Oshawa, with approximately 480 film staff in attendance.

- Matlock – Netflix Series
- Alex Cross - Netflix Series
- The Way Home – Hallmark Series
- The Madness – Streaming Series
- 2 Commercials

Recently we received some feedback from Justin Cutler, the Ontario Film Commissioner at Ontario Creates.

- Parkwood Estate is included in every digital location package which showcases Ontario's most unique and important filming locations
- Parkwood Estate is the most popular Durham location in the Ontario Film Commission Locations database.
- Parkwood Estate is the 29th most popular location in our entire locations database, of over 11,800 files, showcasing all our locations in Ontario
- Parkwood Estate has been used regularly for location filming for over 25 years with crews always citing a positive experience
- Practices and procedures of Parkwood Estate have been studied by other locations looking for the best way to interact with the film industry
- Parkwood Estate staff are amongst the most learned, accessible and well-respected in the province, and are often called upon for their expertise.

Parkwood was pleased to partner with Film Durham on a Co-Branding Agreement whose purpose is to promote Durham's Film Industry.

### **Weddings and photography**

Parkwood was a popular destination of choice for wedding ceremonies and photography in 2023. In an effort to drive more traffic to Parkwood (and the city) we held our 2<sup>nd</sup> Annual Photographer's Open House focusing on photographers outside of the Durham Region. Over 56 companies attended, 33 of whom were from Toronto and surrounding communities. I believe combined with an increased profile on social media, and word of mouth was a large part of the reason why our photo passes and ceremonies increased so substantially. In 2023 our photography permits increased by over 120%, and were so pleased to see increased diversity in guests who are booking these passes. Our plan is to continue to enhance and expand this experience to ensure long-term viability.

### **Tea House**

The Tea House continued to be an exceptionally popular destination once again this summer.

***Between 2020 and 2023, we increased visitors at the Tea House by an astounding 191%***

At the start of the season we added 6 additional tables, and two summer students that acted as Ambassadors for the Tea House, Parkwood and the City of Oshawa. Their role was to support and greet guests, ensure the Tea House experience was exceptional, share information on Parkwood with the hopes we could secure ancillary business through tours or Gift Shop sales, and since many of the guests were new to the region, share with them other great things that they could do while in Oshawa.

In total the Tea House served over 11,500 guests this summer! To support the demand, the Tea House stayed open late on Thursday & Friday nights in the summer, and extended into the fall, opening from Wednesday – Sunday during the month of September.

## SWOT Analysis

Strengths	<ul style="list-style-type: none"> <li>• Strong social media following</li> <li>• Exceptional historic resources to meet educational and tourism mandates</li> <li>• Unique space for event and program offerings, especially with the addition of the new building in the Rose Garden</li> <li>• Source of community pride with increasing awareness within Oshawa and the GTA each day</li> <li>• Support of community leaders, Region &amp; City Council</li> <li>• Dedication of staff (as evidenced by long-service)</li> <li>• Ability to attract volunteers for a multitude of positions</li> <li>• Exposure &amp; expertise to engage with museum &amp; historic site, horticulture, education and tourism sectors</li> <li>• Growing status among peers</li> <li>• Seasoned leadership expertise</li> <li>• Prime space for movie filming, weddings &amp; corporate events</li> <li>• Geographically accessible</li> <li>• Financially accessible</li> <li>• The story of who we are is steeped in community history</li> <li>• Central location, bus availability</li> <li>• Understanding by the staff and Board for the need to invest in our infrastructure/asset</li> <li>• Strong connections with Durham College</li> <li>• Successful Tea House</li> <li>• New branding/logo/brand personality</li> <li>• Gift Shop evolution</li> </ul>
Weaknesses	<ul style="list-style-type: none"> <li>• Historic resources are undervalued</li> <li>• Mid-level awareness by the public (has been increasing in past years but we need to continue to build on this)</li> <li>• Staff resources</li> <li>• Operating and capital challenges not well-understood, particularly the higher costs and standards required of heritage preservation and presentation</li> <li>• Insufficient financial resources – operating, capital</li> <li>• Lack of awareness among younger generation (some work has been done in this area however it continues to need to be a focus)</li> <li>• 2<sup>nd</sup> floor not wheelchair accessible &amp; overall accessibility in certain areas</li> <li>• Language translation and lack of digital tours</li> <li>• More accessibility needed</li> </ul>

<p>Opportunities</p>	<ul style="list-style-type: none"> <li>• Continued provincial and regional investment in tourism</li> <li>• New education/heritage &amp; horticultural connections may help increase awareness, support and partnership opportunities, and help increase audience diversity</li> <li>• Virtual museum presence and webinars on social media</li> <li>• Partnership opportunities with other local organizations</li> <li>• Online and in-person store</li> <li>• Opportunities for an App for the gardens and parts of the mansion</li> <li>• Opportunity for a community app to tell the story of the McLaughlin Family, before they arrived at Parkwood (Oshawa, Tyrone, Eniskillen)</li> <li>• The creation of a space in our Carriage House to introduce the connection to GM, hosting some McLaughlin Buicks – Visitor Welcome Centre</li> <li>• The Building of the new building in the Rose Garden area</li> <li>• Applications for use of technology to engage visitors on a different level (augmented reality)</li> <li>• Grant funding in arts &amp; culture space</li> </ul>
<p>Threats</p>	<ul style="list-style-type: none"> <li>• Deferral of capital reinvestment (further estimated projects about \$ 1.4 million)</li> <li>• Relevance (museum may be seen as old or stuffy)</li> <li>• Funding/Revenue streams decrease</li> <li>• Public stops visiting museum/events</li> <li>• Staff turnover</li> </ul>

Agency Objective 1	Community Impact			
<b>Relevant City Strategic Goals and other City Strategic Plans (if possible, note specific Goals, Objectives, etc.)</b>	<p><b><i>Oshawa Strategic Plan, Our Focus, Our Future</i></b></p> <p><i>Economic Prosperity and Financial Stewardship</i></p> <p><i>Cultural Vitality</i></p> <p><i>Accountable Leadership (responsiveness, transparency)</i></p> <p><b><i>Arts, Culture and Heritage Plan, Culture Counts</i></b></p> <p><i>Build a Strong, Vital and Connected Arts, Culture and Heritage Sector</i></p>			
<b>Strategies</b>	<ol style="list-style-type: none"> <li>1. <i>Increased participation in events/tours</i></li> <li>2. <i>Enhanced Relationships</i></li> <li>3. <i>Corporate Relationships</i></li> </ol>			
<b>Responsibility</b>	<i>Board of Directors, Executive Director, Marketing Committee</i>			
<b>Supporting Partners</b>	<i>Event Team, Marketing Committee, Strategic Planning Committee, Community Partners</i>			
Actions Per Strategy	Timing	Status	Performance Indicator	Target
<p>Create list of 2024 events to include additional 10% visitors on each event/tour</p> <p>Create plan for better awareness to the community</p>	<p>Q4 2023</p> <p>Q1 2024</p>	<p>Event plan meeting to research and establish event &amp; tour list</p> <p>Work with Marketing Committee to develop a strategy</p>	<p>Date is set for the session</p> <p>Agenda established</p> <p>Date is set for meeting</p> <p>Research on best practices</p>	<p>2024 Plan is established</p> <p>3 ideas from this plan are implemented</p>
<p>Enhanced relationships with City</p> <p>Enhanced relationships with Community Partners</p>	<p>Q1 2024</p> <p>Ongoing</p>	<p>Continue to meet with staff at City of Oshawa (annual meeting with CAO, Accessibility Coordinator, etc.)</p> <p>Establish meetings with Lakeridge, and 10 new potential partners</p>	<p>Date set for meetings</p> <p>Presentation to City Council</p> <p>Research completed to identify organizations to meet with</p>	<p>Q2 2024</p> <p>Council has a deeper understanding of our priorities and completed projects</p> <p>4 new partnerships created</p>

<b>New Resource Requirements (if any)</b>				
<i>Research on best practices for marketing and awareness, board support, peer support, community support to create connections for meetings.</i>				
<b>Outcomes/Benefits Per Objective</b>				
<i>Ensure that through a diverse set of events and tours Parkwood remains relevant to our Community and continues to draw visitors from all cultural communities, and that we are accessible to all.</i>				
<b>Agency Objective 2</b>	<b>Visitor Experience</b>			
<b>Relevant City Strategic Goals and other City Strategic Plans (if possible, note specific Goals, Objectives, etc.)</b>	<b><i>Oshawa Strategic Plan, Our Focus, Our Future</i></b>			
	<i>Economic Prosperity and Financial Stewardship</i>			
	<i>Cultural Vitality</i>			
	<i>Social Equity</i>			
	<i>Environmental Responsibility</i>			
	<b><i>Arts, Culture and Heritage Plan, Culture Counts</i></b>			
	<i>Create Vibrant Places and Spaces</i>			
	<i>Provide Access and Promote Inclusion in Oshawa’s Cultural Life</i>			
	<i>Grow Culture-Led Economic Development</i>			
	<i>Ensure an inclusive, healthy and safe community</i>			
<b>Strategies</b>	<ol style="list-style-type: none"> <li>1. <i>Visual Identity</i></li> <li>2. <i>Richness of the Experience</i></li> <li>3. <i>Increased Accessibility</i></li> </ol>			
<b>Responsibility</b>	<i>Executive Director</i>			
<b>Supporting Partners</b>	<i>Brand Ambition, Marketing Committee, City of Oshawa</i>			
<b>Actions Per Strategy</b>	<b>Timing</b>	<b>Status</b>	<b>Performance Indicator</b>	<b>Target</b>
Rollout new digital collaterals and sequence of which ones to take on this year have been identified	Q1 2024	ED & Marketing Committee to develop plan to roll out new digital materials approved by the Board	New collaterals introduced to the community and all board and staff	All new digital collaterals on list rolled out
New signage for Parkwood	Q4 2024	Source wayfinding expert to help plan property signage, utilizing best practices for the visitor experience	Parkwood has a cohesive new look	All signage in place on property



Enhanced user friendly/accessible website	Q4 2024	Develop RFP for new website	RFP distributed to 5 local vendors	Consultant identified New website live
Implementation of results from Visitor Mapping Session	Q1 2024	Meeting with staff to identify key results from the session	List created and agreed upon by staff of areas to focus on	Implement 10 suggested changes
Increased Accessibility	Ongoing	Connect with Durham Deaf Services and Trent University to create a plan to use interpreters for Auto Baron Tour	New tour created and implemented monthly beginning Q3	Increased satisfaction with deaf visitors by 80%
		Connect with CNIB to establish best ways to ensure accessibility for those with visual challenges	List created and approved by Board	Implement 3 suggested changes
		Connect with City of Oshawa Accessibility Coordinator to determine areas where we can better increase accessibility	Meet with Board to review and approve list of potential changes	Implement 2 suggested changes
		Alt-text for all products on online Gift Shop	All products in the online store tagged properly with alt-text	100% satisfaction from those with visual difficulties when using site.
<b>New Resource Requirements (if any)</b>				
<i>CNIB, Trent University, Durham Deaf Services, City of Oshawa, External Marketing Agency, Signage Specialist, City of Oshawa, Accessibility Coordinator, CNIB, Trent University, Graphic Designer, Language Translators, Federal Government, Accessibility Canada,</i>				

Outcomes/Benefits Per Objective
<p><i>Updated, professional and cohesive look will help to ensure Parkwood is a respected brand that is relevant and appealing to tourism sector and visitors, which translates to more revenue. In addition, this work will provide our visitors with a “WOW” experience.</i></p>

<b>Agency Objective 3</b>	<b>Team Experience</b>			
<b>Relevant City Strategic Goals and other City Strategic Plans (if possible, note specific Goals, Objectives, etc.)</b>	<p><b>Oshawa Strategic Plan, Our Focus, Our Future</b></p> <p><i>Economic Prosperity and Financial Stewardship</i></p> <p><i>Cultural Vitality</i></p> <p><i>Social Equity</i></p> <p><i>Environmental Responsibility</i></p> <p><i>Accountable Leadership</i></p> <p><b>Arts, Culture and Heritage Plan, Culture Counts</b></p> <p><i>Grow Culture-Led Economic Development</i></p> <p><i>Broaden and Evolve the City’s Role in Arts, Culture and Heritage</i></p> <p><i>Build a Strong, Vital and Connected Arts, Culture and Heritage Sector</i></p> <p><i>Create Vibrant Places and Spaces</i></p>			
<b>Strategies</b>	<ol style="list-style-type: none"> <li>1. <i>Build a people first culture</i></li> <li>2. <i>Employee Satisfaction</i></li> <li>3. <i>Increased Opportunities for learning &amp; development</i></li> </ol>			
<b>Responsibility</b>	<i>Executive Director</i>			
<b>Supporting Partners</b>	<i>Staff, HR Committee, Board of Directors</i>			
<b>Actions Per Strategy</b>	<b>Timing</b>	<b>Status</b>	<b>Performance Indicator</b>	<b>Target</b>
Establish a strong HR foundation by creating 3 new employee development programs	Q4 2004	Develop succession plan	Meet with team members to learn key components for each position	Succession Plans created for each position, including timeline of work for each position
	Q3 3004	Create a performance development program	Meetings set with HR Committee to research and develop the program	
	Q2	Compensation Philosophy Established	HR committee to research key	

<p>Establish a baseline on employee engagement</p>	<p>Q3</p>	<p>Determine the goals of the engagement survey &amp; source vendor</p>	<p>elements of Compensation philosophies  Vendor identified</p>	<p>Compensation Philosophy approved by Board of Directors</p>
<p>Increase learning and development opportunities by 3 new learnings per year for each employee</p>	<p>Q2</p>	<p>ED to establish a list of opportunities for each staff member</p>	<p>Plan presented to staff and individuals select learnings</p>	<p>Survey completed and results shared with Board and Team.  3 goals for improvement implemented  Each employee completes 3 new development learnings.</p>

**New Resource Requirements (if any)**

*External staff survey organization*

**Outcomes/Benefits Per Objective**

*Long-term engaged staff who are eager to develop and stay committed to the Parkwood team and enjoy their daily experience of coming to work.*

<b>Agency Objective 4</b>	<b>Continuous Improvement</b>			
<b>Relevant City Strategic Goals and other City Strategic Plans (if possible, note specific Goals, Objectives, etc.)</b>	<b><i>Oshawa Strategic Plan, Our Focus, Our Future</i></b>			
	<i>Economic Prosperity and Financial Stewardship</i>			
	<i>Cultural Vitality</i>			
	<i>Social Equity</i>			
	<i>Accountable Leadership</i>			
	<b><i>Arts, Culture and Heritage Plan, Culture Counts</i></b>			
	<i>Increase and Strengthen Communication within and about the Arts, Culture and Heritage Sector</i>			
	<i>Create Vibrant Places and Spaces</i>			
<b>Strategies</b>	<ol style="list-style-type: none"> <li>1. Develop Board Succession plan</li> <li>2. Improved Board Governance</li> <li>3. Invest in physical property and appearance</li> </ol>			
<b>Responsibility</b>	<i>Executive Director, Staff, Marketing Committee</i>			
<b>Supporting Partners</b>	<i>ED, PPP Committee, HR Committee, Executive Committee</i>			
<b>Actions Per Strategy</b>	<b>Timing</b>	<b>Status</b>	<b>Performance Indicator</b>	<b>Target</b>
Develop succession plan for Board Member	Q3 2024	Create Board Matrix to proactively prepare for turnover by identifying term cycles and matrix gaps for future recruitment	Matrix is drafted, approved by Board and sent to Board members for completion	Gaps identified along with terms of office and resulting succession plan.
Develop recruitment and retention strategy for Board members	Q2 2024	Executive Committee working to create strategy	All Board members interviewed for feedback	2 new board members recruited
Ensure proper board governance	Ongoing	Develop list of training opportunities and education sessions for Board members	Exec Committee to oversee the execution of the trainings	Monthly sessions delivered to the Board
Develop future list of PPP projects	Q1 2024	Brainstorming session to take place with the team and Board in Q1 to establish list	List will be broken down into short term, medium term, long terms projects in the categories of conservation, maintenance,	6 new PPP Projects completed by Q4 2024

			capital investment and brand experience	
<b>New Resource Requirements (if any)</b>				
Contractors, trade specialists				
<b>Outcomes/Benefits Per Objective</b>				
<i>Revitalized estate will attract more tourism visitors, TV/film production, and weddings/corporate functions. It will also ensure Parkwood infrastructure is appropriate and well managed.</i>				

<b>Agency Objective 5</b>	<b>Financial Sustainability</b>			
<b>Relevant City Strategic Goals and other City Strategic Plans (if possible, note specific Goals, Objectives, etc.)</b>	<b><i>Oshawa Strategic Plan, Our Focus, Our Future</i></b>			
	<i>Economic Prosperity and Financial Stewardship</i>			
<b>Strategies</b>	<i>Cultural Vitality</i>			
	<i>Social Equity</i>			
<b>Responsibility</b>	<i>Accountable Leadership</i>			
	<b><i>Arts, Culture and Heritage Plan, Culture Counts</i></b>			
<b>Supporting Partners</b>	<i>Build a Strong, Vital and Connected Arts, Culture and Heritage Sector</i>			
	<i>Create Vibrant Places and Spaces</i>			
<b>Actions Per Strategy</b>	<ol style="list-style-type: none"> <li>1. <i>Foundation database to support grant writing</i></li> <li>2. <i>Create diverse series of events to drive visitors to Parkwood</i></li> <li>3. <i>Continue to strengthen relationships with Location Managers for filming</i></li> </ol>			
	<i>Executive Director, Staff &amp; Volunteer Committee</i>			
<b>Timing</b>	<i>Film Location Scouts</i>			
<b>Status</b>				
<b>Performance Indicator</b>				
<b>Target</b>				
Enhanced pool of grants to draw from	Q2/3	Research online grant programs	Decision on program and purchase	Program learned and integrated
		Create Case for Support	Case for Support Completed and vetted through AFP	Q2 2023

Set up all events on website and online booking system	Q1 2024	Gather all information, pricing, collateral images to be placed online	All events live on FareHarbor	Q1 2024 and ongoing as new events are added
Continue to strengthen relationships with Location Scouts & Region of Durham Film Office	Ongoing	Meeting dates established and agendas to be circulated	Host three Film Committees during the year	Q2/3/4 2024
Establish Film Committee with industry contact	Q3 2024	Terms of Reference Established for Committee	Terms of Reference approved by Film Committee and Board of Directors	Q3 2024
		Quarterly meetings established	Meeting held each quarter	Q1/2/3/4 2024
Conversation to QuickBooks financial database	Q1 2024	QuickBooks purchased and data is being organized for data entry	New chart of accounts established, budget created in QuickBooks	QuickBooks is live and staff/new bookkeeper utilizing the program
<b>New Resource Requirements (if any)</b>				
<b>Outcomes/Benefits Per Objective</b>				
<i>.An increased sustainable revenue base will allow for more investment in Parkwood and thereby enhancing heritage/tourism opportunities for programming which are all designed to advance our mandate.</i>				

## Resource Requirements

The 2023 budget projects a deficit of \$31,280. (It shows a surplus of \$78,720 which is due to the delay in the Arbour Project, this portion of the grant will be spent in 2023 along with the second portion of the grant from the City of Oshawa.

## 2024 Objectives & Conclusion

We are excited about what 2024 will bring to Parkwood with some of the key projects over the past few years beginning to see benefits. After the re-emergence of life after COVID-19, we all have to learn to work and live differently. We have found the continuing need to pivot, in that the way we do business is still continuing to evolve; new ways have emerged and some of the old ways have disappeared. No matter what the year brings, we will continue to evolve as an organization to ensure we continue to create foundational building blocks, enhance our visitor experience and create sustainable revenue streams to support the Estate and grounds. The team, volunteers and members of the Board have worked hard over the past few years modernizing our operations, evolving our business best practices, enhancing and growing our team, developing new lines of business to try to ensure that Parkwood is a memory worth revisiting. It continues to be our priority to focus on transparency, awareness, sustainability and inclusiveness.

Our plans for 2024 are exciting and we have moved from the previous few years of cautious optimism to one of “pushing forward” and “diving back in”. With the success of our events these past two years, we are excited to begin the year with a strong line up of diverse events, the continuing success of the Tea House and the Gift Shop, the rollout of our new signage along with the creation and implementation of a strong marketing and awareness campaigns!

We will continue to place a strong focus on finding better and relevant ways to be sustainable and as always, we will continue on our path to provide an excellent and elevated visitor experience, finding ways to be a central hub for the community. This will include a detailed accessibility plan upon which we will continue to build tours in various languages, dialogues around more accessibility and inclusion, and connections with outside agencies.

We continue to find ways to inspire people to visit more than once each year, as we will deliver the promise of experiencing something new each time. With the addition of our World War II tour, we have a goal to create a school program that will tie our programming into existing history curriculum, and we will work to build and continue to strengthen relationships with Retirement Homes and Bus Tours to create memorable day trips, for when these are possible again.

All of the above will be complemented by our other key revenue streams; Parkwood Weddings, Parkwood Studios, and Parkwood Conference & Event Services. Parkwood’s objectives, will build upon the Board’s Strategic Pillars for growth and our new 2023-2027 Strategic Plan, which tie into the City of Oshawa’s Strategic Plan 2020-2023, *Our Focus, Our Future* and the Oshawa Arts, Culture & Heritage Plan, *Culture Counts*.

***With continued thanks and appreciation.***

## Contact Information

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## Board of Directors

<b>Bob Pinkney</b>	<b>President</b>
<b>Ivano Labricciosa</b>	Vice- President
<b>Pat Rudka</b>	Secretary
<b>Niko Anastassakis</b>	Treasurer
<b>City Councillor Tito-Dante Marimpietri</b>	Member
<b>Max Lysyk</b>	Member
<b>Dr. Scott Henderson</b>	Member
<b>Diana Kirk</b>	Member
<b>Lindsay Temple</b>	Member
<b>Aleya MacFayden</b>	Member



## 2024 Operating Budget

See attached budget document

## Variance Explanations:

### **2023 Variance Explanations:**

- **Program & Office Supplies:** This is slightly lower because we were able to secure some donated product and donations for a few of our programs.
- **Professional Services:** This amount is slightly lower than projected as we were without a bookkeeper for a short time, which reduced this expense, and we were able to negotiate a lesser cost. In addition, we did not have the surprise additional cost around our Gift Shop inventory as it relates to our audit.
- **Maintenance and Repairs:** This line exceeds what we had planned to budget by \$97,713. As a result of some critical projects at Parkwood around our infrastructure (roofing, crushed pipes) we had to spend some extra funds, which we used some of the excess revenue, plus a little bit to continue to invest in the asset by completing some necessary deferred maintenance.

Some of the projects completed included:

- Extra support in the garden for needed root feeding, mulch, tree pruning, etc.
- Painting maintenance in the house
- Updating more grounds equipment to electric
- Chiller maintenance and repair
- Working with the Durham Master Gardeners and the Oshawa Garden Club, we continued the restoration of the large tennis court gardens back to their historic intent and plantings
- Installation of two historic 180-foot garden beds that flank the formal garden fountain. These were originally part of property, but were removed in the early 1980's
- Two additional Backflow preventers installed in the Pump House
- Changes to the irrigation system to include the new 180-foot garden beds
- Continued masonry work around the grounds
- Conservation of 5 of the family portraits that hang in the Dining Room
- Repair soffit, fascia and tiles on additional roof areas where animals have caused damage
- New dishwasher for the Tea House
- Maintenance and glazing work on the Vinery Greenhouse
- Enhanced pest control at the Tea House to attempt to address the ongoing wasp problems at the Tea House in late summer

- Lock Service & cleaning on several of the historic locks on the inner doors in the mansion
  - Digitization of over 1,000 blueprints
  - Air quality testing of the Art Gallery space, in preparation for interpretation
  - New fire panel installed to ensure best possible monitoring and response
  - 4 new flat roofs installed on the mansion (Palm tree house, bowling alley, swimming pool, squash court areas)
  - Extensive arbour work on the grounds
  - Extensive repairs to 100-year old pipes from the basement to the south lawn to address broken clay pipes and flooding issues
- **Agency Generated Revenue:** Increase in revenue was due to increased filming activity over what we had projected, increase in tour participants, photography revenue and fundraising events.

### **2024 Variance Explanations**

- **Personnel Cost:** To stay in line with our strategic plan to create a hub for the community, our 2024 plan calls for increased fundraising events and workshops on the property. This combined with our substantial increase in followers on social media, means we will continue with our new hire to manage social media and digital communications. To date our metrics, show that this hire has helped to generate increased traffic on the property, increased followers and interactions and followers on our social media and more participants at our events.
- **Program and Office Supplies:** Continued programming for the public, and artefact conservation is a priority for 2023. Our goal is to continue to conserve and preserve these important artefacts, which will continue to enhance the visitor experience. We have been able to create some relationships that will offer us some reduced costs in this area due to donations of goods and/or services.
- **Professional Services:** we expect these costs to remain similar to our actual for 2023.
- **Maintenance and Repairs:** This is cost for general maintenance, repairs, horticulture supplies, and stays fairly consistent year to year. If we notice an increase in our revenues than we will work on more conservation, preservation and deferred maintenance projects for the protection of the estate and grounds, and the safety of our guests.

- **Agency Generated Revenue:** We are being a bit optimistic on our revenue forecast, but that is because we continue to be aggressive with our event and social media plans, driving more visitors to Parkwood, through tours, Gift Shop and the Tea House. Once again will understand this may be optimistic and we will be watching this line item very carefully.
- **Capital Improvement -Rebuild Arbour**  
As an organization we are very excited about this project and what it will mean for Parkwood, our visitors, our fundraising events, corporate rentals, filming and the City of Oshawa. The initial plans took longer than we had anticipated and mid 2024 will see us presenting these to the City of Oshawa Planning department, and Parks Canada. To that end we did not require the \$100,000 grant from the City of Oshawa in 2022, nor the \$100,000 for 2023. It is our hope to have this project move forward in 2024.



**The Corporation of the City of Oshawa  
2024 Operating Budget  
Parkwood Foundation**

Description	2023 Projected Actuals	2023 Approved Budget	2024 Proposed Budget	2024-2023 Variance \$'s	2024-2023 Variance %
Personnel Costs	811,046	798,420	840,000	41,580	5.2
Program and Office Supplies	74,342	80,000	80,000	-	-
Professional Services	120,000	160,000	135,000	(25,000)	(15.6)
Maintenance and Repairs	247,713	150,000	150,000	-	-
Capital Imp- Renovating the Carriage House	-	100,000		(100,000)	(100.0)
One time grant approved for Carriage House reno	(100,000)	(100,000)		100,000	(100.0)
Agency Generated Revenue	(850,000)	(795,000)	(860,000)	(65,000)	8.2
City of Oshawa Grants	(325,000)	(325,000)	(325,000)	-	-
<b>Total Parkwood Foundation</b>	<b>(21,899)</b>	<b>68,420</b>	<b>20,000</b>	<b>(48,420)</b>	<b>(70.8)</b>

Variance Explanations:

Note: Additional one-time grant approved for rebuilding the Arbour and renovating the Carriage House  
\$100,000 in 2022; \$100,000 in 2023