



Oshawa Historical Society Managing the Oshawa Museum 2018 Business Plan

Introduction

The Oshawa Museum (OM) has been engaging visitors by telling the stories of Oshawa's history since 1960. As the only community museum in Oshawa we take great pride in showcasing the history of our city from the earliest native occupation to the end of WWII. This business plan presents five strategic objectives representing key areas of focus for the OM in 2018. The plan will guide and build on our ongoing activities to develop and manage the collection, undertake research, work collaboratively with our colleagues and stakeholders, present compelling experiences to the public and plan for our future. The objectives, along with related strategies and actions outlined in the Action Plan, will ensure that the OM continues to play a central role in the cultural life of Oshawa and:

- Is visitor oriented;
- Is accessible and engaging to a diverse audience;
- Is financially responsible;
- Is connected with the community;
- Supports the City's tourism initiative.

The five strategic objectives will help us shape the work we do in the next year to realize our mission. In practice, many of the activities and targets will meet more than one of the strategic objectives.

1. Mission Statement

The OM preserves and actively promotes awareness and appreciation of Oshawa's history for the education, enrichment and enjoyment of a diverse audience

Our Values

The OM will be guided in all its activities by the following values:

- Respect: being trustworthy, professional, accurate, informed, dependable
- Pro-active outreach: being collaborative, creative, connected with community
- Inclusive: being accessible, open, welcoming
- Education: being engaging, original, imaginative, diverse

- **Presentation:** our collection helps us to understand and connect with our City both past and present
- **Diligence:** being accomplished, consistent, mindful

2. Service Description and Client Identification

The Oshawa Museum is:

- The only community museum in Oshawa
- Comprised of three designated heritage houses and the Anniversary Drive Shed
- Supported by five regular full time staff, one part time staff, seasonal/temporary staff
- Home to 50 000 objects covering social history, science, technology, indigenous history
- The authoritative source of information on Oshawa's history.

The Oshawa Historical Society (OHS) is a not for profit charitable institution and maintains the OM as a repository for artifacts and written records of historical interest to Oshawa. The Museum is operated by an elected Board of Directors, as an external agency of the City of Oshawa. As outlined in the Constitution and By-Laws (2005) the Board is responsible for making all decisions relating to the operation of the Museum. The Board consists of a President, Vice President, Treasurer, Secretary to the Membership, Standing Committee Chairpersons and Directors at Large. Each Board position is assigned specific responsibilities as are the committees. Currently there are five regular full time positions (Executive Director, Curator, Visitor Experience Coordinator, Community Engagement Coordinator and Archivist) and one regular part-time position (Maintenance). We supplement our core staff with seasonal and temporary staff hired with employment grants, as well as interns and co-op students.

Our Collections

The OHS recognizes the stewardship of the collections and structures as a public trust. We value the trust placed in us to safeguard the collection and we recognize our responsibility to strategically develop the collection for future generations. The OM preserves and actively promotes awareness and appreciation of Oshawa's history for the education, enrichment and enjoyment of a diverse audience. Our collection is diverse, just like Oshawa's history, and we care for over 50 000 artifacts. The OM will continue to strategically manage and develop the collection as a growing resource for education and research.

Our Spaces

The three historically designated buildings, Guy (GH), Henry (HH) and Robinson (RH) houses, as well as the Anniversary Drive Shed, include public spaces, offices/workspace, artifact storage and exhibition space. The buildings are owned by the City of Oshawa and in 2010 a 20 year occupancy license was signed between the OHS and the Corporation of the City of Oshawa. The Anniversary Drive Shed was opened in 2009 as an additional area of exhibition. The OM will continue to promote our spaces as a place of beauty and respite, to engage park visitors and raise the visibility of the Museum.

Our People

The OHS has a professional, committed and highly educated staff. Our knowledge is what gives meaning to our collection and we strive to share these unique stories with the public through various means including exhibitions, podcasts, newsletters, presentations, publications, social media and our virtual collection. We will continue to promote the OM as the authoritative source on the history of Oshawa and extend the ways in which our community can connect with the collection.

3. 2017 Accomplishments by Objective

3.1 Objective: To be vibrant and vital

The OM is part of a vibrant cultural community in Oshawa. We continued in 2017 to focus on providing meaningful experiences for our users. The OHS supports an environment where excellence is celebrated and thriving. The OM realizes the importance of generating meaningful experiences for our community, stakeholders and the public. We continued to provide opportunities for lifelong learning and spaces for a wide range of public services and activities. We continued our active role in Heritage Oshawa and the Cultural Leadership Council as well as other community groups. The OM advanced our brand profile as essential and a leader in preserving and presenting Oshawa's history. Our staff represented the OM at several professional conferences.

Some of the year's highlights included;

- Staff presented at several conferences including Canadian Historical Association and the Archives Association of Ontario
- 14% increase in users in 2017 over 2016
- All social media platforms experienced increase in users. Notable were a 52% increase in Instagram users and a 50% increase in subscribers to our YouTube channel
- Celebrated our 60th anniversary with several events and initiatives
- Continued to provide museum spaces for a variety of events; weekly summer yoga, DDSB teacher training, OPL Storytime, wedding photos

3.2 Objective: Relevant and meaningful collections

The OHS collection is a significant asset and as the only organization collecting the history of the city, it differentiates us from our peers. Our focus is to develop and sustain the collection to the highest standards as outlined by the Operating Standards for Community Museums developed by the Ministry of Tourism, Culture and Sport. We are committed to telling great stories and expanding the narrative of Oshawa's history. To support this, staff continued to refine and develop our exhibition and collection strategy to broaden our reach, appeal to a broad audience and to share new stories. We continued to explore ways for increasing awareness and improving access to our research and collections using our web site, publications, special events, permanent galleries and temporary exhibits with our partners.

In cooperation with our partners we presented temporary exhibits at several locations during the year including Masonic Hall (Doors Open), Oshawa General Hospital Nursing School Alumni and the Oshawa Public Libraries. Several new events held throughout the year focused on staff and visitors engaging more directly with the collection and these proved to be popular with visitors.

Some of the year's highlights included;

- Celebrating 60 Years of Collecting Exhibit
- Where were You in '67? – Exhibit
- A Carrying Place: Oshawa's Indigenous Story – major exhibit - In partnership with Mississauga Scugog Island First Nation- construction and opening
- McLaughlin Cutter (1867) on loan to the Remington and Carriage Museum in Cardston, Alberta for the exhibition The McLaughlin Story: 150 Years of Carriages, Cars and Canada Dry
- McLaughlin Cutter accepted into Canadian Conservation Institute's Canada 150 Conservation Program as a significant historical artifact
- 25 artifacts accepted into Education Collection – an identified collection gap
- Completed project to offer previously unavailable Oshawa newspaper collection online
- Acquired more than 228 items for the collection including the significant Henry/Ellis photo collection and HH architectural drawings

3.3 Objective: Continue to be strong and successful

The OM offers compelling experiences to our users which connect them with our knowledge, collections and spaces. Staff worked diligently to build audiences for our new programs, such as *Tea and Talk* and *Sunday FUNdays* and we continued to offer our space for respite and beauty. The OM provided opportunities for volunteers to develop new skills and we expanded our O-MY program to encourage more youth interaction in programming and events. Our engagement with our audiences was relevant, responsive and, as much as possible, accessible. Our audience became members, volunteers, supporters and advocates of the Museum.

Throughout the year, the OM was proud to continue partnerships and alliances with the Cultural Leadership Council, Art and History Committee, York-Durham Association of Museums and Archives, The Robert McLaughlin Gallery, Donald H. Wilson Secondary School, Oshawa Senior Citizen Centres, Durham College, University of Toronto, Trent University and Oshawa Public Libraries.

Some of the year's highlights included;

- Hosted 3 co-op students from Durham College's Library and Information Technology Program as well as 1 job shadow student
- Collaborations with higher education sector as a member of Program and Advisory Committee for Durham College's Library and Information Technology Program

- Collaborations with Durham College, Trent University, University of Ontario Institute of Technology, University of Toronto and Sir Sandford Fleming College
- Grants successfully applied for included Canada Cultural Spaces, Young Canada Works Internship, Young Canada Works Summer Employment, Community Museum Operating Grant, New Horizons, Community Fund for Canada's 150th

3.4 Objective: effective and collaborative staff

The OHS continued to operate the OM with sound management and financial policies designed to ensure resources are used in the most responsible and efficient way. We continued to work closely with the City of Oshawa and our cultural partners to support the delivery of current and future cultural strategies. Good governance is ensured with a strong commitment to reviewing board and organizational policies and transparency between Board and staff. All staff and board members understand their roles in relation to the OHS Business/Action Plans and we developed and revised policies as necessary to guide our work. The Board ensures our policies and operations are at the highest standards as classified by the Standards for Community Museums in Ontario.

Some of the year's highlights included;

- 3 publications produced and 4 newsletters
- Released monthly podcasts featuring original research
- New projects in development
- Conducted annual review of policies
- Continued co-operative retail agreement with The RMG, Canadian Automotive Museum and Parkwood

3.5 Objective: Provide adequate space and facilities

We consider the three historically designated buildings the most important artifacts in our collection however, as museum buildings, they do present some challenges and the amenities must be upgraded. The physical limitations of adapting heritage buildings to support museum functions are reflected most acutely in two areas: a serious lack of programming space and insufficient exhibit space. After careful consideration of the 1996 Feasibility Study and the recent Canadian Conservation Institute's Facility Assessment, the Board of Directors decided to move forward with plans for improving museum space and facilities to support efficient and sustainable preservation and interpretation of the Museum's collection.

Some of the year's highlights included;

- Canadian Conservation Institute's Facility Assessment was completed and Board considered recommendations
- Started dialogue with members of City Council, staff and interested parties regarding the OM facility expansion plans

- Internally restricted a further \$ 5 000 for future use
- Prepared an initial design concept for new building which defines scale and scope

4. SWOT Analysis (Strengths, Weaknesses, Opportunities and Threats)

<p style="text-align: center;">STRENGTHS</p> <p>Oshawa’s only community museum Expansive artifact collection Committed, respected, professional staff Location in Lakeview Park Good relationship with members of Council, City Staff and OHS Highly skilled staff, board and volunteers City’s waterfront development plans Broad thematic scope of programs Open service policy Strong, positive image Positive public interactions with staff</p>	<p style="text-align: center;">WEAKNESSES</p> <p>Lack of programming and exhibit space Lack of funds for matching grants Vulnerable to vandalism, environmental factors Infrastructure challenges Current economic factors Insufficient funds for artifact purchase Low public profile Lack of awareness for heritage locally Uncertain funding levels Use of occasional staff make it difficult to get program continuity Difficult to increase self-generated revenue with spatial limitations</p>
<p style="text-align: center;">OPPORTUNITIES</p> <p>City’s plans for waterfront development Oshawa 2024 celebration Use of digital media to increase profile Partnerships and links with community New exhibits Relationships with Council members and senior City staff Location in Lakeview Park Participation in Cultural Leadership Council</p>	<p style="text-align: center;">THREATS</p> <p>Earned revenue shortfall Uncertain seasonal staffing levels Increase of non-discretionary, fixed costs Uncertainty in local economy Challenged to recruit volunteers, OHS members and Board members Aging infrastructure and maintenance costs Interruption of business due to events held in Lakeview Park</p>

5. 2018 Agency Objectives

The OHS recognizes the need for responsible action that will ensure the sustainability of Oshawa in the future. For the upcoming fiscal year the OHS has adopted reasonable assumptions in budget planning while continuing to create efficiencies, avoiding unnecessary costs and generating revenue where applicable. The OHS believes a strong commitment to the arts and culture community contributes to the overall vision of the Oshawa Strategic Plan (OSP)

and the Arts, Culture and Heritage Plan (ACHP) as well as the strategic plan, *Ontario Museums 2025*, from the Ontario Museum Association. We have identified five strategic objectives for 2018 that contribute to all five of the OSP goals, the six strategic directions identified in the ACHP and the four themes presented in *Ontario Museums 2025*.

5.1 To be vibrant and vital

We continue to demonstrate our utility to the community by offering on-site, online and outreach services and facilities to develop knowledge and understanding in our users.

5.2 To present relevant and meaningful collections

The OM continues to explore alternate and relevant strategies to broaden reach, appeal to new audiences and capture diverse stories.

5.3 To be strong and successful

The OM cultivates strong partnerships and will continue to initiate new relationships to support our mandate and offer new opportunities.

5.4 To support a strong and collaborative staff

The OM has a committed, professional staff and ongoing skills development is encouraged. Staff pursues meaningful connections with academia.

5.5 Provide space and facilities that are aesthetically pleasing and effective in preserving and interpreting Museum collections.

The OHS will continue to further the case for improved spaces and amenities to support the efficient and sustainable operation of the OM.

6. Resource Requirements

The OHS appreciates the support from members of Oshawa City Council and City staff for the work we do and we recognize the need for responsible action that ensures the sustainability of Oshawa going forward. With this in mind the OHS has produced a lean operating budget that controls expenses and found efficiencies to save resources and aligns resources consistent with the direction provided by the Oshawa Strategic Plan **Our Focus, Our Future** and the Arts, Culture and Heritage Plan, **Culture Counts**. At \$496 300, the proposed 2018 OHS budget is up \$12 000 or 2.5% from the 2017 approved budget of \$484 300. The City of Oshawa grant request is up \$6 000 or 1.4%

Budget changes are the result of:

- a) Unavoidable increases related to professional services including insurance
- b) Increase in building maintenance and repair costs associated with maintaining 3 historic houses
- c) Increase personnel costs (staff and benefits) of \$10 700. Staffing levels and compensation rates are reviewed annually. Our external review indicates our salaries are much lower than similar positions in comparable institutions. This budget line also includes unavoidable increases for benefit costs.

7. Conclusion

The OHS gratefully acknowledges the support of the City of Oshawa for the OM and our efforts to preserve and promote awareness and appreciation for the history of Oshawa. The OM is an important component in the cultural landscape of the City of Oshawa. As one of the few remaining heritage districts and the only community museum in Oshawa, the three heritage homes and the drive shed that comprise the Museum are ideally situated to tell the story of Oshawa from the earliest First Nations occupation to present times. We help communicate community identity, spark interest and engagement, enhance public knowledge and contribute public value to the City. We believe in telling great stories and expanding the historical narratives to be more inclusive of how we look at our history.

Our strength lies in our collections, our spaces and our people and our mandate directs our activities and the connections we make. Oshawa's citizens tell us they feel a sense of ownership and pride in our collections and the three museum buildings. History organizations make their communities more attractive places in which to live, work, learn and play. With astute leadership, compelling vision, and partners and resources sufficient to the task, the OHS will continue to be a leader in the arts, culture and heritage community of Oshawa.

**The Corporation of the City of Oshawa
2018 Operating Budget
Oshawa Historical Society**

Description	2017 Projected Actuals	2017 Approved Budget	2018 Proposed Budget	2018-2017 Variance \$'s	2018-2017 Variance %
Personnel Costs	366,700	363,300	374,000	10,700	2.9
Program and Office Supplies	24,400	24,400	24,400	-	-
Professional Services	36,800	36,200	37,400	1,200	3.3
Maintenance and Repairs	34,600	31,500	31,600	100	0.3
Utilities	28,900	28,900	28,900	-	-
Agency Generated Revenue	(63,000)	(63,000)	(69,000)	(6,000)	9.5
City of Oshawa Grants	(421,300)	(421,300)	(427,300)	(6,000)	1.4
Total Oshawa Historical Society	7,100	-	-	-	

Variance Explanation:

Increases related to professional services (eg. insurance), building maintenance and repair costs, and salary and benefit increases