

100 YEARS

PARKWOOD

National Historic Site

1917-2017

**The Parkwood Foundation
2019 Budget and Business Plan**

Prepared for: The City of Oshawa

December 2018

The Parkwood Foundation would like to extend our utmost appreciation to the City of Oshawa for continuing to support this treasured National Historic Site with an annual operating grant, and the recent string of capital grants that have supported our greenhouse restoration project. This document outlines our accomplishments from the past year and our upcoming plans for 2019. It is a plan that requires the continuation of the foundational work that began in 2017, and the furtherance of that work which will position us for continued growth as we enter Parkwood's second century of existence.

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 2019.

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.

Service Description and Client Identification

Parkwood National Historic Site and Gardens exists to celebrate the social history of the 20th 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.

2018 Accomplishments

Parkwood began a transformation in 2017, led by the Board of Directors and a new Executive Director, to prepare for the Estate's second century of existence. The plan was robust, strategic with the focus that makes an ongoing contribution to Oshawa and Durham Region as a vital social, economic, and cultural force.

In late 2016 after a series of strategy meetings, the Board of Directors agreed upon a set of recommendations and Strategic Pillars (see below) that will support and advance our Vision and Mission, and guide the Board and staff moving forward. 2017 saw the initial roll out of these pillars with 2018 putting some of the strategic measures into place. The accomplishments from 2018, aligned with the Board recommendations saw a continuation of the roll out of the strategic measures (Year 2) approved by the Board of Directors.

*Parkwood exists to celebrate the social history of the 20th century. These Strategic Pillars have been established by the Board of Directors to support and advance our Vision and Mission; and to guide the Board in its governance role and management in strategic and operational planning. These will also serve as our **Agency Objectives:***

- #1. Uphold a model of excellence in Board Governance*
- #2. Invest in preserving and enhancing the estate and gardens*
- #3. Build and strengthen a sustainable revenue generating infrastructure*
- #4. Effectively brand, promote, and communicate Parkwood's mandate to all stakeholders*

#5. Promote and provide a first class experience for staff, volunteers, and customers

#6. Wherever possible, ensure proper access for all persons to Parkwood.

Recommendation #1: adopt a best practices board governance model

All of the desired committees are now in place along with Terms of Reference for each Committee, which are compliant with our by-laws. Each Committee structure consists of members of the Board of Directors, external volunteers and a Parkwood staff member. One of the Board members on the Committee reports an update of their work at each Board meeting. Each Committee has a key area of focus they continue to work on that ties back to ensuring best practices are in place and key areas of project focus.

Current Committees:

- Finance Committee
- HR Committee
- Marketing & Communications Committee
- Physical, Plant & Property (PPP) Committee

An updated Board Governance Manual has been completed and circulated to the Board, which provides a clear outline of the Board's role and how it should operate. With the change in Executive Director's the Board spent time transitioning in 2017 & 2018 from a hands-on board back to a governance-based board.

Recommendation #2: improve and modernize business operations

Parkwood has been actively improving and modernizing operations and in 2018, the process continued and we saw the completion of the following:

- A recent external security audit made several recommendations that would further enhance Parkwood's security systems. The following were completed;
 - A new camera system was purchased and installed that allows us enhanced night vision, plus the ability to zoom in on certain cameras when asked or automatically when there is motion.
 - Additional cameras were added to cover areas of the estate not previously covered (the rose garden, the arbour, the Adelaide gate, and the walkway near the public washroom entrance)
 - A switch in our security monitoring company
 - Enhanced procedures for our staff and volunteers to ensure safety at all times
 - A ½-day session for staff, volunteers and our security team on ways for everyone to be as safe as possible, led by a Constable from DRPS.
 - *Still to be completed is the establishment and formalization of a Security Committee with members of local law enforcement.*

- As part of good financial stewardship, our new budget templates and procedures, monthly financials, and financial processes have now been completed and put into place. The end is in sight for our new Financial Manual, which will encompass all of the best practices we have identified within our work during the last year. Once complete it will have a final review and sign off by the Finance Committee and the Board of Directors.
- Our new HR Committee has begun regular meetings and we are weaving our way through all of the policies and procedures. 2019 will see the completion of this overhaul in the form of an HR Manual that will result in new policies and procedures that follow industry best practices and ensure compliance with ESA (Employment Standards Act) and all other applicable laws. This Committee consists of the Executive Director, staff representatives, Board members and several HR experts from local companies. This is a key focus for Parkwood in 2019 to ensure we have transparency and responsiveness for all the members of our team.

Recommendation #3: Expand on existing and implement new earned revenue opportunities

Parkwood Studios is having a tremendous year with the film and television production business. Our team has created strong relationships within this sector and we continue to find ways to entice this industry to film at Parkwood. Parkwood is one of Durham Region's few locations with Studio Status, and our well-established film and television production business provides significant revenue and promotion. It is not without its challenges as filming involves closures of the Museum; however, the team continues to work hard to meet the needs of everyone.

Visitors have a strong curiosity about film production at Parkwood so we have created a room beside our gift shop that focuses on the talent and filming that has taken place at Parkwood.

In 2019, we will endeavour to create a specialty "Movie Tour" to capitalize on those members of the public who have a particular interest in the filming that happens at Parkwood with the goal of introducing them to the history of Parkwood.

In 2018, we worked with the Region of Durham on an international "Fannibals" group tour that involved Parkwood, and 2019 will see us capitalize on the release of the Downton Abby movie with a series of specialized events involving Servant's tours and servant's dining experiences.

Another line of revenue generation in development this past year was **Parkwood Weddings**. Parkwood intends to become a major player in the GTA wedding business by providing exclusive and unique experiences. Like Parkwood Studios, this business will contribute significant revenue to Parkwood's operational and capital needs. We have hired Kenneth Roberts Entertainment, licensed wedding and event planners to work with us to explore, grow and manage this business, while providing a first-class experience to our clients. With that in mind we converted the 2nd floor of The Lodge (a space not previously open to the public) into an elegant space where brides and bridal parties can get ready for the festivities. In addition we invested in and opened the final spaces on the property as options for brides to consider for their ceremonies. (south lawn, arbour, Tea House grounds)

Parkwood Conference & Event Services will involve establishing the Estate as a location of choice for social, corporate and charity events. Now that we have a solid process for our wedding clients, we will turn our attention in the coming year to showcase Parkwood as a unique venue for companies and organizations to host their meetings/functions. In addition, we hope to work with other local attractions and hotels to create packages that would entice more bus tours to visit the region.

Parkwood Tourism & Programming After a full review of Parkwood Estate programming offerings and opportunities was completed a suite of new and/or refreshed programs was presented during the centennial year. As a way to respond to an enhanced visitor experience, the following actions were undertaken or are in the planning stages as part of our three-year plan:

- We revised a job description of one of the team member's so that we now have a **Visitor Experience Coordinator** to ensure that Parkwood has a primary focus on our visitors and their experiences at Parkwood.
- In order to remove the "stuffy" museum experience, we removed our stanchions so that guests could view the rooms from different angles and perspectives
- We opened the house for tours and the grounds every Thursday evening until 9:00pm
- We opened new spaces in the mansion (The Butler's Pantry, more rooms on the third floor (Servant's spaces) and although currently an office, a part of the Seamstresses Room. In 2019 we hope to open the Bachelor's Quarters, and the sitting room and Chef's Bathroom on the 3rd floor)
- We brought back a much smaller version of the kitchen garden as a way to tell more of our historical story on the grounds
- Working with the Durham Master Gardeners we took our White Garden back to its original look and feel to be true to our history
- We created a new Art tours displaying the amazing Canadian art in the house.
- Although regularly available now, the Servant's Tours was embellished and a Specialty Servant's Tour was available in Oct. 2018 for 10 days.
- The Basement Tours Weekend continued as a ten-day specialty tour and we added a display area showcasing photo boards of the home under construction, blueprints from the original plans for the home, which changed as the home was built, trivia information about the home and some bricks that guests could touch and feel from the original build.
- To ensure Parkwood is more inclusive and accessible we hope to create a tour in sign language on an iPad for those with hearing challenges. In addition, we will create tours in several languages for those with language barriers so they can enjoy the tour with other guests but hear it in a language most familiar to them.

- We hope 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.
- We will look into a tour booking system to manage reservations and provide a more user-friendly system for our guests.

Recommendation #4: Effectively rebrand, promote and communicate Parkwood’s mandate to all stakeholders

As we celebrated our milestone Centennial from Sept. 2017-2018, we were proud to roll out our 100th anniversary logo. This new logo informed our Centennial collateral materials, and will be used as the starting point for our 2019 rebranding campaign. Our plans include a new logo, tagline, and mission and vision statement.

- In May of 2018, we were thrilled to launch our **brand new website**. Starting from the beginning we rebuilt a site that is more visual, user friendly, easier to navigate, and explains our mandate to our viewers.
- We completed a **Search Engine Optimization (SEO) Audit** to identify ways that Parkwood is front and centre on all social media platforms internally through Facebook, Instagram, 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, city of Oshawa, etc.)
- The **Durham Transit Bus** wrapped on one whole side with a Parkwood ad was on the road for all of 2018 and will remain on the road for 2019. In 2019 the focus for the Marketing Committee will be:
 - the creation of a more strategic approach to address advertising campaigns and to drive traffic to the museum, including all of our events and museum activities
 - The completion of the implementation of the results from the SEO audit
 - The creation of metrics by which we can measure the success of these campaigns to ensure we are investing appropriately and seeing positive results.
- As a way to **engage youth** and connect to the community we coordinated a tremendous volunteer program this summer, hosting 55 teens on 5 different days to help in the gardens with weeding, watering, raking, etc. Through this program we received over 385 volunteer hours and we are planning several fall clean up days too.

- A strong focus for us to ensure that we invest in ways to ensure Parkwood becomes more relevant in relation to the times, and has a stronger presence in Durham, the GTA and surrounding regions.

Recommendation #5: create a disciplined Philanthropy Office & more sustainable events/revenue streams:

In 2018, we continued to strengthen our sustainability by hosting several successful events, which were designed to generate revenue, drive sponsorship, and provide historical content to participants. This will continue as part of our annual planning and to that end we have hired a Special Events Coordinator to help ensure success with this focus.

Parkwood will focus on this recommendation in 2019 as we continue to find new and diverse revenue streams. Sustainability is vital to a successful future for Parkwood and more time and effort will continue to be dedicated to addressing this area (philanthropy, individual giving, earned revenue and a solid plan for foundation grants and Parkwood events) in the coming years.

Capital Projects

We are happy to say that the 2-year project involving the restoration of our Greenhouses is complete (deficiencies to be completed by the end of the year) and we are excited to be opening it to our guests in the late spring of 2019.

Our PPP Committee has been hard at work gathering quotes and identifying areas within Parkwood that need to be updated and/or restored. Investing in our asset through infrastructure and long deferred maintenance is an important next step to ensure that we are a place that individuals want to visit, in addition to ensuring the estate is well maintained.

SWOT Analysis

Strengths	<ul style="list-style-type: none"> • Exceptional historic resources to meet educational and tourism mandates • Unique space for event and program offerings • Source of community pride • Support of community leaders & City Council • Dedication of staff (as evidenced by long-service) • Ability to attract volunteers for a multitude of positions • Exposure & expertise to engage with museum & historic site, horticulture, education and tourism sectors • Growing status among peers • Seasoned leadership expertise • Prime space for movie filming, weddings & corporate events • Geographically accessible • The story of who we are is steeped in community history • Central location, bus availability
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	<ul style="list-style-type: none"> • Understanding by the staff and Board for the need to invest in our infrastructure/asset • Strong connections with Durham College
Weaknesses	<ul style="list-style-type: none"> • Historic resources are undervalued • Low awareness by the public • Staff resources (especially in development & marketing) • Outdated branding • Operating and capital challenges not well-understood, particularly the higher costs and standards required of heritage preservation and presentation • Insufficient financial resources – operating, capital • Operations over-reliant on rental revenues, which can be unpredictable and demanding • Not interactive, static exhibits • Lack of awareness among younger generation • 2nd floor not wheelchair accessible & overall accessibility in certain areas • Parts of the Museum are “tired” and need TLC • Language translation and lack of digital tours
Opportunities	<ul style="list-style-type: none"> • Continued provincial and regional investment in tourism • New education/heritage & horticultural connections may help increase awareness, support and partnership opportunities, and help increase audience diversity • Virtual museum presence and webinars on social media • Partnership opportunities with other local organizations • Social media allows for the opportunity to reach a different audience and provide opportunities for deeper engagement • Stronger visitor experience • Stronger number of guests at The Lodge • Reimagined Tea House • Opportunities for an App for the gardens and parts of the mansion • Open final few spaces to engage a different audience • The creation of a space in our Carriage House to introduce the connection to GM, hosting some McLaughlin Buicks • Applications for use of technology to engage visitors on a different level
Threats	<ul style="list-style-type: none"> • Deferral of capital reinvestment (tendered projects about \$ 600K, further estimated projects about \$ 3 million) • Core activities (museum functions: research, education & interpretation, public programming, collections care and collections management) are not-well supported, so losing competitive position • Relevance (museum may be seen as old or stuffy)

Agency Objective 1	Uphold a Model of Excellence in Board Governance			
Relevant City Strategic Goals and other City Strategic Plans (if possible, note specific Goals, Objectives, etc.)	<i>Oshawa Strategic Plan, Our Focus, Our Future</i>			
	<i>Economic Prosperity and Financial Stewardship</i>			
	<i>Cultural Vitality</i>			
	<i>Accountable Leadership (responsiveness, transparency)</i>			
	<i>Arts, Culture and Heritage Plan, Culture Counts</i>			
	<i>Build a Strong, Vital and Connected Arts, Culture and Heritage Sector</i>			
Strategies	<ol style="list-style-type: none"> 1. Embark on a strategic planning process for 2020 2. Revise & Update an HR Manual that includes policies and procedures 3. Revise & Update Financial Policies & Procedures 4. Establish a Security Committee 			
Responsibility	<i>Board of Directors and Executive Director</i>			
Supporting Partners	<i>Staff Input, Finance Committee, Strategic Planning Committee, HR Committee, Security Lead</i>			
Actions Per Strategy	Timing	Status	Performance Indicator	Target
Embark on a strategic planning process (scheduled for early 2020)	Q1/2 2020	Strategic Planning Committee to be established in Q2 2019	Committee is in place	Q2 2019
		RFP's to find a facilitator for this exercise Q3/4 2019	Facilitator established	Q3/4 2019
Revise & Update financial policies & procedures	Q2/3 2019	Financial policies are about 50% completed	Financial Policies & Procedures Approved by Finance Committee & Board of Directors All staff and Board will have a solid understanding of the new financial policies and procedures	Q3 2019
Revise & Update HR policies & procedures	Q2/3/4 2019	HR Committee to begin bi-monthly meetings to review and	HR & Procedures Approved by the Board	Q4 2019

Establish a Security Committee	Q2 2019	updated current policies.		
		HR policies are being reviewed to ensure they are ESA compliant	Percent compliance with ESA and other applicable laws	100%
		Committee established to review and establish security policies and procedures that unify with industry best practices	Security Policies & Procedures reviewed and approved by the Board	Q3 2019
			Improved understanding of safety procedures and security policies by staff and volunteers. All staff will complete a security to ensure they understand the policies	Q3 2019 100% pass rate
New Resource Requirements (if any)				
<i>Funding for Strategic Planning Facilitator, DRPS volunteer</i>				
Outcomes/Benefits Per Objective				
<i>A strong and transparent governance model that includes financial and HR systems that will support the overall achievement of Parkwood's business plan to increase profile, compliance with all guidelines, secure ongoing funding and ensure Parkwood processes are above reproach.</i>				

Agency Objective 2	Invest in preserving and enhancing the estate and gardens			
Relevant City Strategic Goals and other City Strategic Plans (if possible, note specific Goals, Objectives, etc.)	<p><i>Oshawa Strategic Plan, Our Focus, Our Future</i></p> <p><i>Economic Prosperity and Financial Stewardship</i></p> <p><i>Cultural Vitality</i></p> <p><i>Environmental Responsibility</i></p> <p><i>Arts, Culture and Heritage Plan, Culture Counts</i></p> <p><i>Create Vibrant Places and Spaces</i></p> <p><i>Provide Access and Promote Inclusion in Oshawa's Cultural Life</i></p> <p><i>Grow Culture-Led Economic Development</i></p>			
Strategies	<p>1. Develop long-range master capital plan that prioritizes and sequences key investments in capital projects and assets.</p> <p>2. Develop funding plan for capital revitalization.</p> <p>3. Remove & replace 36 cedar trees in the formal gardens</p>			
Responsibility	<i>Executive Director, Staff and Physical Plant and Planning Committee of the Board</i>			
Supporting Partners	<i>Building trades, specialized heritage facility professionals, community and corporate donors/sponsors/grantors, Staff input, Executive Director, Grounds Foreman</i>			
Actions Per Strategy	Timing	Status	Performance Indicator	Target
Develop and finalize long range master Capital Plan that prioritizes and sequences key investments in capital projects and assets.	Q2 2019	<p>Plan created in Q4 2017 to be distributed to staff and the Physical Plant and Planning Committee for review, discussion, and to establish priorities</p> <p>Template created to manage the capital plan priorities and tasks to be updated and reviewed by Physical Plant and Planning Committee</p>	<p>Master Capital Plan and priorities approved</p> <p>Ensure the estate and grounds remain in excellent condition for another century by identifying and completing capital projects/deferred maintenance each year</p>	<p>Q2 2019</p> <p>3 Capital Projects from the Master List completed by Q4 2019</p>

Create a development plan for capital revitalization	Q3 2019	Draft Development Plan submitted to the Board for review, discussion and approval	Development Plan to support the Capital Plan approved	Q4 2019
Remove & replace 36 unhealthy cedar trees in the formal gardens to be more in line with the Historical Landscape Garden Plan	Q1/2 2019	Receive approval from the City on recommendation of the Historical Committee	Plan is approved by the City	Q4 2018/Q1 2019
		Remove and replace all cedars	New cedars are in place before the busy spring/summer season	Q2 2019
New Resource Requirements (if any)				
<i>Landscape Specialist, Specialized machinery, Funding for removal and replacement</i>				
Outcomes/Benefits Per Objective				
<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>				

Agency Objective 3	Build and strengthen a sustainable revenue generating infrastructure			
Relevant City Strategic Goals and other City Strategic Plans (if possible, note specific Goals, Objectives, etc.)	Oshawa Strategic Plan, Our Focus, Our Future			
	<i>Economic Prosperity and Financial Stewardship</i> <i>Cultural Vitality</i> <i>Social Equity</i> <i>Environmental Responsibility</i> <i>Accountable Leadership</i>			
	Arts, Culture and Heritage Plan, Culture Counts			
	<i>Grow Culture-Led Economic Development</i> <i>Broaden and Evolve the City's Role in Arts, Culture and Heritage</i> <i>Build a Strong, Vital and Connected Arts, Culture and Heritage Sector</i> <i>Create Vibrant Places and Spaces</i>			
Strategies	<i>Maximize revenue opportunities and determine new and sustainable sources of revenue opportunities via tourism and programming, weddings, conferences, events and film production.</i>			
Responsibility	<i>Executive Director</i>			
Supporting Partners	<i>City of Oshawa, Region of Durham, Ontario Film/TV Marketing, Wedding industry, Tourism Ontario, Board of Directors, Wedding Agency</i>			
Actions Per Strategy	Timing	Status	Performance Indicator	Target
Parkwood Tourism & Programming	Ongoing	In the process of organizing archives to open the last few rooms in mansion open to the public	Percent increase in visitors year over year	15%
Create Visitor Experience Coordinator Position	Q1 2019	Finalizing job description and shift around responsibilities with some initial training	Increase in visitor satisfaction	Minimum 4 star average on visitor survey Monthly report of recommendations by the Visitor Experience Coordinator
Parkwood Weddings	Ongoing	Brainstorming session to create collateral materials for Weddings (hard & soft copy and website)	Percent increase in wedding bookings year over year	20%

<p>Parkwood Conference & Events</p> <p>Find ways to create awareness about Mansion Sunroom rental space</p>	<p>Q2 and ongoing</p>	<p>Brainstorming session scheduled to develop a 2019 plan scheduled for early December 2018</p> <p>Brainstorming session to determine information for collateral materials</p>	<p>Increase in rental space year over year</p>	<p>20%</p>
<p>Parkwood Studios</p> <p>Continue to strengthen relationships with Location Scouts & Region of Durham Film Office</p>	<p>Ongoing</p>	<p>Attend quarterly meetings at the Region</p>	<p>Number of film tours Parkwood will participate in</p>	<p>2 - FAM Tour and Fannibals Tour</p>
<p>Host a "Lookbook" event for local photographers</p>	<p>Q3</p>	<p>Planning for this event will take place in Q1</p>	<p>Increase in photography bookings year over year</p> <p>Full time Special Events Coordinator hired</p>	<p>20%</p> <p>Q2 2019</p>
<p>Create a disciplined Philanthropy Office</p> <p>Complete training for new Special Events Coordinator. Move from Contract to Full-time position</p>	<p>Q1</p>	<p>Awaiting approval to move forward in our Proposed Budget for FY2019</p>		
<p>New Resource Requirements (if any)</p>				
<p><i>KRE Wedding Planners, Graphic Designer, Marketing Committee, Community Photography Support</i></p>				
<p>Outcomes/Benefits Per Objective</p>				
<p><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></p>				

Agency Objective 4	Effectively brand, promote and communicate Parkwood's mandate to all stakeholders			
Relevant City Strategic Goals and other City Strategic Plans (if possible, note specific Goals, Objectives, etc.)	<p><i>Oshawa Strategic Plan, Our Focus, Our Future</i></p> <p><i>Economic Prosperity and Financial Stewardship</i></p> <p><i>Cultural Vitality</i></p> <p><i>Social Equity</i></p> <p><i>Accountable Leadership</i></p> <p><i>Arts, Culture and Heritage Plan, Culture Counts</i></p> <p><i>Increase and Strengthen Communication within and about the Arts, Culture and Heritage Sector</i></p> <p><i>Create Vibrant Places and Spaces</i></p>			
Strategies	<ol style="list-style-type: none"> 1. Create new logo, tagline, mission & vision statement 2. Create updated collateral materials reflecting new look and feel of branding 3. Complete SEO audit and implement recommendations 4. Create strategic 3 year advertising campaign 			
Responsibility	<i>Executive Director, Staff, Marketing Committee</i>			
Supporting Partners				
Actions Per Strategy	Timing	Status	Performance Indicator	Target
Create new logo, tagline, mission & vision statement	Q4 2019	RFP process to be used to secure partner to create new branding Board meeting to develop new vision and mission statement	Logo, tagline and mission & vision statement approved	Q4 2019
Create updated collateral materials reflecting new look and feel of branding	Ongoing	Pieces to be updated to new branding and sequence of which ones to take on this year have been identified	Parkwood has a cohesive and professional look	N/A
RFP for SEO Audit	Q1 2019	RFP process used to secure an organization for our SEO audit and implementation	Percent increase in online traffic year over year (google, yelp, etc)	25%

With the Marketing Committee, begin the process of preparing a 3 year cohesive advertising campaign	Q2 2019	Brainstorming session and resulting plan to take place in Q2 2019	Advertising Plan approved by the Board Percent increase in awareness and visitor bookings year over year	Q2 2019 15%
New Resource Requirements (if any)				
<i>Contracted services of a Marketing Company/Graphic Designer/Web Hosting Provider</i>				
Outcomes/Benefits Per Objective				
<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, the ability to have better accessibility on our website will open up Parkwood to more online visitors with accessibility challenges. Increased engagement with on-line visitors will also be an important outcome.</i>				

Agency Objective 5	Promote and provide a first class experience for staff, volunteers, and customers			
Relevant City Strategic Goals and other City Strategic Plans (if possible, note specific Goals, Objectives, etc.)	<p><i>Oshawa Strategic Plan, Our Focus, Our Future</i></p> <p><i>Economic Prosperity and Financial Stewardship</i></p> <p><i>Cultural Vitality</i></p> <p><i>Social Equity</i></p> <p><i>Accountable Leadership</i></p> <p><i>Arts, Culture and Heritage Plan, Culture Counts</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>			
Strategies	<ol style="list-style-type: none"> 1. <i>Develop a plan specific to enhancing the staff, volunteer, and customer experience.</i> 2. <i>Develop an app for the Garden Tours</i> 3. <i>Develop online booking system for Guests</i> 			
Responsibility	<i>Executive Director, Staff & Volunteer Committee</i>			
Supporting Partners				
Actions Per Strategy	Timing	Status	Performance Indicator	Target
Develop a plan specific to enhancing the staff,	Q2 2019	Framework for meeting established. Meeting set for February 2019	Number of innovative ideas generated	10

volunteer, and customer experience...		2nd annual brainstorming session with the staff and volunteer representatives to determine list of ideas to enhance the visitor experience	Number of new ideas approved by the Board for implementation in 2019	3
			Visitor Experience Plan Approved	Q3
			Percent increase in reported visitor satisfaction	40%
			Percent increase in reported staff satisfaction	30%
Develop app for the gardens to enhance the garden tour experience	Q2 2019	Research app based organizations who have developed Garden Tours	App is available to all guests, in multiple languages	Q4
Implement an online booking system for guests	Q1/Q2 2019	Research completed on organizations who provide software to facilitate online bookings	Online booking system is in place	N/A
			Percent of bookings that are on-line bookings	30%
New Resource Requirements (if any)				
<i>Facilitator (External) App Developer, Sign Language Interpreter, Software Developer</i>				
Outcomes/Benefits Per Objective				
<i>Long-term engaged staff, volunteers, and customers who are eager to make Parkwood a success providing a first class experience to everyone who comes through the gates. More word of mouth and a high level reputation.</i>				

Agency Objective 6	Accessibility & Inclusion			
Relevant City Strategic Goals and other City Strategic Plans (if possible, note specific Goals, Objectives, etc.)	<i>Oshawa Strategic Plan, Our Focus, Our Future</i>			
	<i>Cultural Vitality</i>			
Strategies	<i>Social Equity</i>			
	<i>Arts, Culture and Heritage Plan, Culture Counts</i>			
Responsibility	Build a Strong, Vital and Connected Arts, Culture and Heritage Sector			
	Create Vibrant Places and Spaces			
Supporting Partners	Provide Access and Promote Inclusion in Oshawa's Cultural Life			
	<ol style="list-style-type: none"> 1. <i>Create Tour on iPad for those with hearing challenges</i> 2. <i>Create a Photo show in iPad to support the Tour for those with vision challenges</i> 3. <i>Create Tours on headphone systems in a variety of languages for better inclusion</i> 4. <i>Create opportunities for more volunteer engagement that supports accessibility and inclusion</i> 			
Actions Per Strategy	Timing	Status	Performance Indicator	Target
Create tour on iPad for those with hearing challenges	Q1/Q2 2019 2018	Meet with the local organization to provide a tour in sign language	Percent increase in visitors with hearing/vision challenges	10%
Create supporting photos on iPad for those taking the tour with visual impairments	Q1/Q2 2019	Meeting with a photographer to plan photos that work with the tour script to provide an opportunity for enhanced viewing.	Reported level of satisfaction from visitors with hearing/vision challenges	100% satisfaction
Create tours on headphone system in a variety of languages for better inclusion	Launch in Q4 2019	Planning in progress	Level of accessibility achieved	Complete accessibility for those individuals with hearing/visual challenges
			Number of tours available in different languages	3 tours
			Number of different languages available	3 languages

2019 Operating Budget

The Corporation of the City of Oshawa					
2019 Operating Budget					
Parkwood Foundation					
Description	2018 Projected Actuals	2018 Approved Budget	2019 Proposed Budget	2019-2018 Variance \$'s	2019-2018 Variance %
Personnel Costs	680,581	614,349	650,000	35,651	5.8
Program and Office Supplies	78,000	70,754	80,000	9,246	13.1
Professional Services	260,000	294,508	220,000	(74,508)	(25.3)
Maintenance and Repairs	50,000	38,500	65,000	26,500	68.8
Agency Generated Revenue	(630,244)	(588,952)	(600,000)	(11,048)	1.9
City of Oshawa One Time Grant	(75,000)	(75,000)		75,000	(100.0)
City of Oshawa Grants	(325,000)	(325,000)	(325,000)	-	-
Total Parkwood Foundation	38,337	29,159	90,000	60,841	208.7

Variance Explanations:

2018 Variance Explanations:

- **Personnel Cost:** Increase in filming hours, overlap of staff as we train two new team members, open longer hours in summer
- **Program and Office Supplies:** Increased programming costs in order to open new areas, the addition of a golf tournament (expenses) costs to finalize the Gift shop and Lodge transformation
- **Professional Services:** Continued high utility prices, leak in the fountain for part of the year, new security system installed
- **Maintenance and Repairs:** Investing in the asset by completing some deferred maintenance, tree removal, maintenance of aging equipment
- **Agency Generated Revenue:** Difference primarily due to increased filming and new programs drawing more visitors

2019 Variance Explanations

- **Personnel Cost:** There is an increase in this line item as we have hired a Special Events Coordinator (Moving her from a one year consultant role to a full time position in 2019) We will also be open more hours in the summer season.
- **Program and Office Supplies:** Increase due to removal and replacement of 37 cedars by the Foundation (deferred from 2018) and increased program activities for the public

- **Professional Services:** Has decreased from the 2018 budget as we are moving our one-year fundraising consultant into a full time role. (now in the Personnel line item)
- **Maintenance and Repairs:** Increase from 2018 projected actuals as we continue to invest in the asset regarding aging infrastructure and necessary upkeep
- **Agency Generated Revenue:** A continued focus on increasing our development activity to include more special events, programs for the public, specialty tours and Foundation grants.

* No ask for a one-time grant from the City of Oshawa for \$75,000 this year.

** Excess revenue will be put towards additional deferred maintenance

2019 Objectives

2019 marks an exciting year for Parkwood. It is the first year in our second century of existence and the entire team at Parkwood is very excited about the future, and our focus on transparency, awareness, sustainability and inclusiveness.

Our plans for 2019 are ambitious and serve to continue the implementation of our five Strategic Pillars that were mentioned earlier. We will begin by rebranding ourselves, creating and implementing a strong marketing and awareness campaign. We will focus on finding better and relevant ways to be sustainable moving forward, and we will continue on our path to provide an excellent and elevated visitor experience. This will include online bookings, tours in various languages, more accessibility and inclusion, connections with outside agencies, and opening and interpreting the final few rooms, so the entire mansion is available to visitors. Similar to other museums, we will begin to mount exhibitions that will inspire people to visit more than once each year, as we will deliver the promise of experiencing something new each time. We will be open for Christmas Holiday tours and possibly an old-fashioned Christmas event. We endeavour to tie our programming into existing history curriculum with schools to drive attendance and we will work to build and strengthen relationships with Retirement Homes and Bus Tours to create memorable day trips.

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 tie into the City of Oshawa's Strategic Plan 2015-2019, *Our Focus, Our Future* and the Oshawa Arts, Culture & Heritage Plan, *Culture Counts*.

Conclusion

2019 will be another year of transition and growth for Parkwood, bringing greater focus and discipline to our key businesses and building on the foundational work completed in 2017 and

2018. We are excited to increase our visibility and awareness and continue on the path of creating a first class space for visitors to enjoy.

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**The Corporation of the City of Oshawa
2019 Operating Budget
Parkwood Foundation**

Description	2018 Projected Actuals	2018 Approved Budget	2019 Proposed Budget	2019-2018 Variance \$'s	2019-2018 Variance %
Personnel Costs	680,581	614,349	650,000	35,651	5.8
Program and Office Supplies	78,000	70,754	80,000	9,246	13.1
Professional Services	260,000	294,508	220,000	(74,508)	(25.3)
Maintenance and Repairs	50,000	38,500	65,000	26,500	68.8
Agency Generated Revenue	(630,244)	(588,952)	(600,000)	(11,048)	1.9
City of Oshawa One Time Grant	(75,000)	(75,000)	-	75,000	(100.0)
City of Oshawa Grants	(325,000)	(325,000)	(325,000)	-	-
Total Parkwood Foundation	38,337	29,159	90,000	60,841	208.7

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Personnel Cost: There is an increase in this line item as we have hired a Special Events Coordinator (Moving her from a one year consultant role to a full time position in 2019). We will also be open more hours in the summer season

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Professional Services: Has decreased from the 2018 budget as we are moving our one-year fundraising consultant into a full time role (now in the Personnel line item)

Maintenance and Repairs: Increase from 2018 projected actuals as we continue to invest in the asset regarding aging infrastructure and necessary upkeep

Agency Generated Revenue: A continued focus on increasing our development activity to include more special events, programs for the public, specialty tours and Foundation grants