

Architectural Conservancy of Ontario

STRATEGIC PLAN 2024 – 2029

September, 2024

Table of Contents

1. Introduction	2
1.1 This Report	2
2. Strategic Planning Process	2
3. Mission	3
4. The Plan: Cornerstones, Key Initiatives, Lead and Outcome/Measurement	3
5. Monitoring & Evaluation	3
The Plan	4
Monitoring and Evaluation: Key Initiatives	13

1. Introduction

One of the primary responsibilities of any Board of Directors is to assist the development of a short and long-term strategy for the organization, a key component of which is the development of a strategic plan. For the Architectural Conservancy of Ontario, the strategic planning process is of importance and timely as it proceeds alongside of the Operations Working Group whose objective is to bring the organization into financial sustainability. Direction from C.R.A. and guidance from our auditors, Vloet & Kan, continue to outline required procedures and compliance.

1.1 This Report

This report is structured as follows. Immediately following this **Introduction, Section 2 Strategic Planning Process** provides a high-level overview of the strategic planning process undertaken. **Section 3 Mission** captures the current mission statement along with some statistics on results of the survey. **Section 4 Cornerstones, Strategic Directions, Key Initiatives, Lead and Outcome Measures** outline the plan for the next 4 years. **Section 5 Monitoring & Evaluation: Key Initiatives 2024 – 2029** captures the monitoring & evaluation format for the 2024 – 2029 initiatives. The **Appendix** includes the survey sent out in 2023 along with the results.

2. Strategic Planning Process

Recognizing that the Board was very overdue to update the Strategic Plan and recognizing that the Covid pandemic had been partly responsible, a committee was struck to undertake this task. The political landscape had greatly changed since the last Strategic Plan was undertaken in that Heritage was under attack legislatively in the province. Societal pressures had also come to the fore such as a lack of housing, the impacts of climate change, changing diversity within the Canadian population as well as the work of the Truth and Reconciliation Commission and its Calls to Action made it even more necessary to update the Strategic Plan.

A Strategic Plan Committee was formed< Members of the group were Diane Chin, Chair of the Board of Directors until June of 2024; Deb

Crawford, Vice-Chair and Chair of the Board of Directors after June 2024; Eben Rawluk, Treasurer of the Board of Directors; Leslie Thompson, former Chair of the Board of Directors and Will Coukell, Chief Operating Officer. This strategic planning document is a synthesis of the work accomplished during the several sessions of the group.

3. Mission

Through education and advocacy, to encourage the conservation and re-use of structures, districts and landscapes of architectural, historic and cultural significance, to inspire and benefit Ontarians.

When the membership was surveyed, 74.1 % felt that the organization was doing a good job of advocacy but only 38.1% felt that we are doing a good job of education. These two pillars of our mission statement were also felt to greatly need improvement again especially education. Outreach to politicians and decision makers was also cited as a need though not as great as education and was indicated by 59.68% of the members as being done well.

4. The Plan: Cornerstones, Key Initiatives, Lead and Outcome/Measurement

This illustrates actual priorities and direction to be used to guide the Board and Staff over the next 5 years.

5. Monitoring & Evaluation

This document will be used to report back to the Board on a quarterly basis.

- Responsible Financial Management
- Compliance with relevant legislation
- Well informed Board
- Long Term Financial sustainability
- Funding visibility & certainty
- Work within our means - with respect for future organizational needs



ARCHITECTURAL
CONSERVANCY
ONTARIO



- Increase the understanding of what we do within the government sphere
- Build the public understanding of the value of heritage conservation
- Increase & promote the value of heritage conservation with the government both with political and bureaucratic parties
- Educate & enable the capacity of members to tell our collective story.

2024-2029

Strategic Plan

- Embrace shared vision, values, & purpose throughout the organization
- Learn from each other
- Celebrate achievements
- Collaborate with our allies
- Thoughtfully engage Ontarians



- Embracing & encouraging diversity through outreach
- Education

Our Mission: Through education and advocacy, to encourage the conservation and reuse of structures, districts, and landscapes of architectural, historic, and cultural significance, to inspire and benefit Ontarians

ADVOCACY

Strategic Direction	Key Initiative	Lead	Outcome Measure
<i>It is important to not just develop the understanding of why heritage conservation and preservation is important, but also why ACO is important</i>	Key initiative	Lead	Outcomes/outputs
Increase the understanding of what we do within the government sphere: - Get our message out to bureaucrats (not just political presence) by meeting with them both on an official and non official basis	- Tell our story Develop material to document ACO's history and promote its mission and values, and use it. Engage at least twice a year with bureaucrats in positions of authority over issues pertinent to both heritage and current policy	Government and Community Relations Committee Government and Community Relations Committee	Evaluate in 4 years if there is an increase of knowledge among gov't people 2 meetings per year
Build the public understanding of the value of heritage conservation - Develop message(s) to explain why heritage conservation is of value	Promote what we do through publications, social media, speaking engagements, and mainstream media to inform, promote and advocate Create quarterly webinars (by end of year 5) to educate and raise the awareness of the value of heritage conservation particularly to highlight the importance of heritage conservation to	Government and Community Relations Committee/ Education Committee Education Committee	1st year begin program to be continued Create two annual information sessions, webinars, or other activities per year by year 5

	underrepresented cultural communities		
- Develop relationships with those who can extend our message	Seek out relationships with other organizations and lead players in the sector	Government and Community Relations Committee	
Increase and promote the value of heritage conservation with the government both with political and bureaucratic parties - Meetings with MPPs outside of HAD day	At least one meeting in each branch catchment area a year	Government and Community Relations Committee	At least 1 meeting per branch by end of 2 nd year
- Train and educate branch members on how to meet with their local politicians (provincial and municipal) to explain concepts	Provide several training workshops (at least once a year, perhaps also a recorded version on our YouTube or EHow channels)	Education Committee	
Advocate for the value of heritage conservation	Produce a written document outlining the various causes and proposals ACO should pursue each year	Policy Committee	1 – 3 per year

Educate and enable the capacity of members to tell our collective story -Train and educate branch members on the importance of ACO and it's message	Provide several training workshops (4 per year by year 5) also a recorded version on our YouTube or EHow channels	Education Committee	Surveys at end of each session measuring level of 'education'.
---	--	----------------------------	---

Connectivity

Strategic Direction	Key Initiative	Lead	Outcome Measure
Embrace shared vision, values, and purpose throughout the organization	Update and validate ACO's vision, mission, values and purpose with the Board of Directors and members Develop a decision matrix to link every decision to ACO's vision, values and purpose	Chair	Completed by April 1, 2025. COO/ Board of Directors Publish a summary report by March of each year. (COO)
	Convene video conference calls with branches to talk about their advocacy and education initiatives	Education Committee	Branch participation % Branch feedback
Learn from each other, promote innovation	Create a library of branch and committee testimonials telling our stories accessible from an online database. Establish an inventory of expertise to draw on to create limited, short term ad hoc working groups to develop innovative approaches to develop alternatives.	Executive	% of branches and committees submitting stories and # of reviews Inventory of 10 – 15 resource members year 1 with a target of 25 by 2026 3-5 ad hoc working groups developed per year to address a range of topics that resulted in implementation plans

Celebrate Achievements	Annually recognize branch, Provincial Office, and Committee achievement's related to ACO's mission and purpose Create opportunities to celebrate ACO's successes (i.e. AGM, social media, membership promotion, fundraising, etc.)	Governance & Nominating Committee	# of individuals and/or branches recognized # of uses
Collaborate with our allies	Develop and implement a multi-year strategy to identify and engage our allies. Survey the Executive, committee members and Board to inventory their connections to other organizations, former employers and other expertise that may be helpful to meeting ACO's goals.	Education Committee, Policy Committee GCRC COO	Strategies developed by July 1, 2025. Provide the Executive and Board with regular updates, including the results of collaboration efforts. Questionnaire to be distributed mid-October and consolidated by April 1, 2025.
Thoughtfully engage Ontarians	Identify and deliver opportunities to engage non-members Utilize ACO success stories, advocacy efforts, policy and GCRC issues etc. to expand reach. Utilize social media judiciously to connect across all generations.	GCRC,	Minimum of one engagement per year Social media followers # of Provincial members Overall increase/decrease in membership

DIVERSITY

Strategic Direction	Key Initiative	Lead	Outcome Measure
Embracing and encouraging diversity through outreach	1. Attend and participate in cultural festivities of Indigenous, BIPOC and LGBTQ communities such as festivals, holiday celebrations, parades in local communities to gather stories of the people and to understand their relationship to the spaces where these celebrations occur and to establish connections with those communities	Branches	1.1 celebration attended/year 2. 1 follow up interaction with communities/per year 3. Stories needed
	2. Reach out to communities	Board and Branches	1 per Branch and 1 per Board per year
Education	1. Share these stories and contacts in Branch Reports, Acorn in a Nutshell	Branches and Committees	1 report per Branch/year
	2 Develop an Acorn issue about diverse communities' heritage	Acorn Committee	1 issue within 3 years
	3. Education sessions for members of ACO on successful strategies connecting with diverse communities	Education Committee	1 session within two years
	4. Education sessions to highlight a community such as Chinatown in Montreal that successfully met a challenge to save its community's heritage	Education Committee	1 session within 2 years
	5. Contact Tyendinaga Library Program Centre on Indigenous Heritage To create a webinar	Education Committee	1 contact within first year
	6. Land Acknowledgements at all meetings	Committees and Branches	Every Branch and Committee meeting

RESILIENCY

Strategic Direction	Key Initiative	Lead	Outcome Measure
Responsible financial management:			
Compliance with relevant legislation	Comply with all commitments in 2020 CRA compliance agreement	COO	If performed, no findings by CRA in future audit No material audit findings during annual audit
	Prepare and review a compliance certificate which includes all relevant legislation	COO / Board	Receipt of compliance certificate at 100% of Board meetings No noted non-compliance with [material] legislation
	Periodic attendance by appropriate members of Executive at not-for-profit governance learning events	Executive	Each Executive member attending one (1) relevant session each two (2) year term.
	Maintenance of appropriate expertise in not-for-profit governance on the Board of Directors	Governance and Nominating Committee	[Bi-annual] evaluation of Board competencies received and accepted by Board of Directors.
Well informed Board	Develop a simplified financial reporting package for Board consumption which includes information on sources of revenue (e.g., donations, memberships, levies, etc.)	Treasurer	Receipt by Board of revised reporting package by end of [2025]. Increase in Board self-reported understanding of ACO's financial position.
	Include financial overview / education in Board orientation materials / presentations	COO / Treasurer	Delivery of financial overview by nomination of new Directors in 2025.

	Develop a periodic refresher for delivery to the Board (during meetings or via webinar or similar)	Treasurer	Delivery of at least one (1) Board refresher each fiscal year.
Long term financial sustainability:			
Funding visibility and certainty	Develop corporate sponsor relationships as a key pillar of funding	Fundraising Committee	# of corporate sponsors \$ value of corporate sponsor revenues % of repeat corporate sponsors
	Develop foundation relationships	Fundraising Committee	# of foundation donors \$ value of foundation donor revenues % of repeat foundation donors
	Engage Board and Branches in fundraising for the Provincial Office	Executive / Development Coordinator	100% of Directors donating to ACO (branch or P.O.) % of total members contributing to Provincial Office (membership or donation)
	Develop and implement periodic “shock-test” for ACO’s revenues to ensure organization can withstand periodic disruptions	Treasurer / FAC	Board receipt and acceptance of shock-test report at least every [two] years Ability to withstand a one-time drop of [30%] of revenues without insolvency
Work within our means, having respect for future organizational needs	Establish working group to evaluate ACO’s budget deficit and explore expense reductions	Chair / Treasurer	Surplus or break-even budgets by no later than [2027]
	Evaluate federated model of ACO relative to organizational revenues and funding	Chair	Affirmative decision by Board (by way of vote) on federated model by no later than 2026.

Monitoring and Evaluation: Key Initiatives

A key component of monitoring and evaluation is regular reports to the Board on the progress to date. The reports will be given to the Board quarterly, (at each Board meeting). The format below highlights the specific initiative, corresponding outcome measures and indicators in addition to the key responsible lead (group or individual), and status updates. It is anticipated that this format will be utilized as a Board reporting tool, in part.

Note: LEAD means the person or committee who is initiating the initiative, this does not mean they are solely responsible for the task.

The mission statement anchors the monitoring & evaluation tool as all present and future initiatives should reflect our mission.

Mission Statement

Through education and advocacy, to encourage the conservation and reuse of structures and landscapes of architectural, historic and cultural significance, to inspire and benefit Ontarians.

Key Cornerstones

The Key cornerstones are:

Advocacy

Connectivity

Diversity

Resiliancy

ADVOCACY

Strategic Direction	Key Initiative	Lead	Outcome Measure	Status
<i>It is important to not just develop the understanding of why heritage conservation and preservation is important, but also why ACO is important</i>	Key initiative	Lead	Outcomes/outputs	
Increase the understanding of what we do within the government sphere: - Get our message out to bureaucrats (not just political presence) by meeting with them both on an official and non official basis	- Tell our store Develop material to document ACO's history and promote its mission and values, and use it. Engage at least twice a year with bureaucrats in positions of authority over issues pertinent to both heritage and current policy	Government and Community Relations Committee Government and Community Relations Committee	Evaluate in 4 years if there is an increase of knowledge among gov't people 2 meetings per year	
Build the public understanding of the value of heritage conservation - Develop message(s) to explain why heritage conservation is of value	Promote what we do through publications, social media, speaking engagements, and mainstream media to inform, promote and advocate	Government and Community Relations Committee/ Education Committee	1st year begin program to be continued	

Strategic Direction	Key Initiative	Lead	Outcome Measure	Status
- Develop relationships with those who can extend our message	Create quarterly webinars (by end of year 5) to educate and raise the awareness of the value of heritage conservation particularly to highlight the importance of heritage conservation to underrepresented cultural communities Seek out relationships with other organizations and lead players in the sector	Education Committee Government and Community Relations Committee	Create two annual information sessions, webinars, or other activities per year by year 5	
Increase and promote the value of heritage conservation with the government both with political and bureaucratic parties - Meetings with MPPs outside of HAD day - Train and educate branch members on how to meet with their local politicians (provincial and municipal) to explain concepts Advocate for the value of heritage conservation	At least one meeting in each branch catchment area a year Provide several training workshops (at least once a year, perhaps also a recorded version on our YouTube or EHow channels) Produce a written document outlining the various causes and proposals ACO should pursue each year	Government and Community Relations Committee Education Committee Policy Committee	At least 1 meeting per branch by end of 2nd year 1 – 3 per year	

Strategic Direction	Key Initiative	Lead	Outcome Measure	Status
Educate and enable the capacity of members to tell our collective story -Train and educate branch members on the importance of ACO and it's message	Provide several training workshops (4 per year by year 5) also a recorded version on our YouTube or EHow channels	Education Committee	Surveys at end of each session measuring level of 'education'.	

Connectivity

Strategic Direction	Key Initiative	Lead	Outcome Measure	Status
Embrace shared vision, values, and purpose throughout the organization	Update and validate ACO's vision, mission, values and purpose with the Board of Directors and members Develop a decision matrix to link every decision to ACO's vision, values and purpose	Chair	Completed by April 1, 2025. COO/ Board of Directors Publish a summary report by March of each year. (COO)	
	Convene Zoom calls with branches to talk about their advocacy and education initiatives	Education Committee	Branch participation % Branch feedback	
Learn from each other, promote innovation	Create a library of branch and committee testimonials telling our stories accessible from an online database. Establish an inventory of expertise to draw on to create limited, short- term ad hoc working groups to develop innovative approaches to develop alternatives.	Executive	% of branches and committees submitting stories and # of reviews Inventory of 10 – 15 resource members year 1 with a target of 25 by 2026 3-5 ad hoc working groups developed per year to address a range	

			of topics that resulted in implementation plans	
Celebrate Achievements	Annually recognize branch, Provincial Office, and Committee achievement's related to ACO's mission and purpose Create opportunities to celebrate ACO's successes (i.e. AGM, social media, membership promotion, fundraising, etc.)	Governance & Nominating Committee	# of individuals and/or branches recognized # of uses	
Collaborate with our allies	Develop and implement a multi-year strategy to identify and engage our allies. Survey the Executive, committee members and Board to inventory their connections to other organizations, former employers and other expertise that may be helpful to meeting ACO's goals.	Education Committee, Policy Committee GCRC COO	Strategies developed by July 2025 Provide the Executive and Board with regular updates, including the results of collaboration efforts. Questionnaire to be distributed mid-October and consolidated by April 1, 2025	
Thoughtfully engage Ontarians	Identify and deliver opportunities to engage non-members	GCRC,	Minimum of one engagement per year Social media followers	

	Utilize ACO success stories, advocacy efforts, policy and GCRC issues etc. to expand reach. Utilize social media judiciously to connect across all generations.		# of Provincial members Overall increase/decrease in membership	
--	---	--	--	--

DIVERSITY

Strategic Direction	Key Initiative	Lead	Outcome Measure	Status
Embracing and encouraging diversity through outreach	3. Attend and participate in cultural festivities of Indigenous, BIPOC and LGBTQ communities such as festivals, holiday celebrations, parades in local communities to gather stories of the people and to understand their relationship to the spaces where these celebrations occur and to establish connections with those communities	Branches	1.1 celebration attended/year 2. 1 follow up interaction with communities/per year 3. Stories needed	
	4. Reach out to communities and add database info.?	Board and Branches	1 per Branch and 1 per Board year	
Education	1. Share these stories and contacts in Branch Reports, Acorn in a Nutshell	Branches and Committees	1 report per Branch/year	
	2 Develop an Acorn issue about diverse communities' heritage	Acorn Committee	1 issue within 3 years	
	3. Education sessions for members of ACO on successful strategies connecting with diverse communities	Education Committee	1 session within two years	
	4. Education sessions to highlight a community such as Chinatown in Montreal that successfully met a challenge to save its community's heritage	Education Committee	1 session within 2 years	
	5.Contact Tyendinaga Library Program Centre on Indigenous Heritage To create a webinar	Education Committee	1 contact within first year	

Strategic Direction	Key Initiative	Lead	Outcome Measure	Status
	6. Land Acknowledgements at all meetings	Committees and Branches	Every Branch and Committee meeting	

RESILIENCY

Strategic Direction	Key Initiative	Lead	Outcome Measure	Status
Responsible financial management:				
Compliance with relevant legislation	Comply with all commitments in 2020 CRA compliance agreement	COO	If performed, no findings by CRA in future audit No material audit findings during annual audit	
	Prepare and review a compliance certificate which includes all relevant legislation	COO / Board	Receipt of compliance certificate at 100% of Board meetings No noted non-compliance with [material] legislation	
	Periodic attendance by appropriate members of Executive at not-for-profit governance learning events	Executive	Each Executive member attending one (1) relevant session each two (2) year term.	
	Maintenance of appropriate expertise in not-for-profit governance on the Board of Directors	Governance and Nominating Committee	[Bi-annual] evaluation of Board competencies received and accepted by Board of Directors.	
Well informed Board	Develop a simplified financial reporting package for Board consumption which includes information on sources of revenue (e.g., donations, memberships, levies, etc.)	Treasurer	Receipt by Board of revised reporting package by end of [2025]. Increase in Board self-reported understanding of ACO's financial position.	

Strategic Direction	Key Initiative	Lead	Outcome Measure	Status
	Include financial overview / education in Board orientation materials / presentations	COO / Treasurer	Delivery of financial overview by nomination of new Directors in 2025.	
	Develop a periodic refresher for delivery to the Board (during meetings or via webinar or similar)	Treasurer	Delivery of at least one (1) Board refresher each fiscal year.	
Long term financial sustainability:				
Funding visibility and certainty	Develop corporate sponsor relationships as a key pillar of funding	Fundraising Committee	# of corporate sponsors \$ value of corporate sponsor revenues % of repeat corporate sponsors	
	Develop foundation relationships	Fundraising Committee	# of foundation donors \$ value of foundation donor revenues % of repeat foundation donors	
	Engage Board and Branches in fundraising for the Provincial Office	Executive / Development Coordinator	100% of Directors donating to ACO (branch or P.O.) % of total members contributing to Provincial Office (membership or donation)	
	Develop and implement periodic “shock-test” for ACO’s revenues to ensure organization can withstand periodic disruptions	Treasurer / FAC	Board receipt and acceptance of shock-test report at least every [two] years	

Strategic Direction	Key Initiative	Lead	Outcome Measure	Status
			Ability to withstand a one-time drop of [30%] of revenues without insolvency	
Work within our means, having respect for future organizational needs	Establish working group to evaluate ACO's budget deficit and explore expense reductions	Chair / Treasurer	Surplus or break-even budgets by no later than [2027]	
	Evaluate federated model of ACO relative to organizational revenues and funding	Chair	Affirmative decision by Board (by way of vote) on federated model by no later than 2026.	