



NIAGARA
PARKS

BUSINESS PLAN 2020-2023

File updated:
September 15, 2020

Revised for COVID-19
considerations



The Niagara Parks Commission

Revised COVID-19 Business Plan 2020-2023

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1.0 Executive Summary

Niagara Parks approved its original 2020-23 Business Plan in December 2019. The plan intended to build on the momentum of continued growth in visitation and revenue. Niagara Parks established a new benchmark high for revenue in fiscal 2019-20, that included the following highlights:

- \$127 million in revenue (including \$99 million from its own revenue-producing operations)
- 2 million visitors to Niagara Parks' six attractions
- 1.3 million trips on WEGO transportation green-line
- 1.2 million trips on Falls Incline Railway

Additional highlights included:

- Opening Phase I of the Table Rock redevelopment
- Expanded Indigenous programming with the Landscape of Nations 360 initiative
- New environmental partnership with Brock University
- Expansion of trail connections, including a formal link to the Empire State trail in New York State
- Implementation of new wayfinding across Niagara Parks' 56km corridor
- New winter public programming to expand "four-seasons" tourism
- Expanded culinary tourism offerings, supporting Niagara Parks' participation in the Feast On program and Ontario purveyors

Just as the fiscal year was about to conclude, the reality of COVID-19 came into focus. The impact from the global COVID-19 pandemic on Niagara Parks, Niagara, Ontario and Canada has proven to be unprecedented. The tourism industry was impacted overnight. Niagara Parks, following the advice of Ontario's Chief Medical Officer of Health, made the decision to close all revenue-producing operations effective March 14, 2020. For the remainder of March and well into the months of April and May, Niagara Parks followed provincial emergency guidelines to ensure that it was protecting public safety.

Moving forward under the new reality of continuing to address the ongoing public health challenge of COVID-19 and working to support economic recovery, Niagara Parks will follow its 10-year strategic plan that came into effect in 2018, while adjusting some priorities where required. Niagara Parks is a key demand generator for Niagara's and Ontario's visitor economy and is well positioned and prepared to support the Ministry's recovery efforts.



Guided by the strategic plan, Niagara Parks will continue to focus on developing and nurturing great guest experiences, growing revenue and reducing administration expenses and processes.

1.1 Priorities for 2020-21

Priorities are broken out by the themes of Niagara Parks' 10-year strategic plan.

Preserving and showcasing our rich heritage, culture and lifestyle

- Implement the sales and marketing plan, including enhanced digital marketing and working with Niagara's Regional Tourism Organization (RTO – Tourism Partnership of Niagara) and Niagara Falls Tourism
- Deliver environmental stewardship projects, including partnerships with Brock University, Niagara Peninsula Conservation Authority, Ministry of Environment, Ministry of Natural Resources and Forestry, Environment Canada, Landscape of Nations 360
- Support cultural stewardship projects, including indigenous programs
- Create public programming plan, including environmental and cultural programs (on-site and virtual)

Leveraging and activating our natural wonders and iconic experiences

- Complete Phase II redevelopment of Table Rock Centre
- Continue implementation of the Queen Victoria Park master plan
- Implement Phase II of the wayfinding plan

Supporting a dynamic business environment with a focus on attracting investment, connection to local communities, job creation and economic well-being

- Implement Phase I of the adaptive re-use of the Canadian Niagara Power Generating Station
- Undertake call for development proposals for Niagara Parks' Marina at Miller's Creek
- Expand the pay and display parking program
- Open the TaylorMade Performance Centre at the Legends on the Niagara golf complex
- Re-start the Niagara Parks Foundation

Taking experiences, services and hospitality to the next level

- Implement new enterprise resource planning (ERP) finance system
- Develop business continuity plan and enterprise risk plan



- Implement workforce adjustment plan
- Create new health, safety and compliance unit
- Support guest safety and security plan
- Relocate and consolidate floral production

Niagara Parks has experienced market and financial challenges in the past and has always managed its business and paid its credit obligations. The board and senior staff are aligned through the strategic plan, annual business plan and budget and are focused on its collectively agreed upon resources. This alignment and focus will ensure that Niagara Parks comes through this unprecedented global pandemic.

1.2 Background: COVID-19 Impact

The board, following the advice of Ontario's Chief Medical Officer of Health, made the decision at the end of the day on March 13, 2020, to close all Niagara Parks public-facing facilities effective the following morning. Fortunately, Niagara Parks' growth over the last five years resulted in a healthy balance sheet and cash position, including \$10 million in cash. However, expenses continued as Niagara Parks enforced provincial emergency orders as well as addressing new personal protective equipment (PPE) requirements, training and ongoing required maintenance of facilities. The extended closures, as well as the severe downturn in market conditions including the lack of US and international visitors (which are high-yield customers), have impacted Niagara Parks' short-term financial position.

In addition, Niagara Parks' tenants have faced the same impacts from closures. This has affected their collective ability to pay Niagara Parks their respective rent obligations. Niagara Parks is addressing each tenant, assessing their capacity to pay in the context of their respective agreement with Niagara Parks. This has added to Niagara Parks' short-term financial challenge.

As the impact of COVID-19 and closures came into effect, Niagara Parks focused on the following short-term priorities:

- Health and Safety: for guests and staff. This work included ensuring compliance with provincial emergency orders, standardizing cleaning products and procedures, enhancing cleaning protocols, rolling out new PPE and increasing communications
- Conserving Cash: spending freezes were put in place, staff levels were reduced and revised cash flow projections established
- Corporate Culture: enhanced communication with staff was put in place to help with conveying timely updates, sharing information about the closures and re-opening plans



- Developing re-opening scenarios which resulted in a phased approach for Niagara Parks' revenue-producing operations
- Review financial viability of revenue-producing operations in light of changed capacities and visitation patterns
- Communication with key stakeholders to share operational updates

1.3 Plan to Move Forward

COVID-19 has had an unprecedented impact on tourism and the broader economy. Recovery is anticipated to be slow – a marathon, not a sprint – with the potential risk of a second wave delaying recovery. Niagara Parks is anticipating that it will take multiple years to return to pre-COVID business levels.

The overall permanent impact on consumer habits is unknown. Up to March 2020, and for many years prior, Niagara Parks' revenues have consistently been approximately 70% from US and international visitation and 30% from domestic travel. The closure of the borders to US and international travel has had a significant impact on Niagara Parks' revenue streams.

Niagara Parks will focus on maintaining tight expenditure controls to weather the financial impact of the COVID-19 pandemic on revenues and continuing to offer great guest experiences in 2020, including opening of Phase II of Table Rock redevelopment and, in 2021, opening the adaptive re-use of the Canadian Niagara Generating Station and contributing to hosting the Canada 2021 Summer Games in Niagara.

Niagara Parks is an anchor agency in Niagara that is a leader in environmental and cultural stewardship while playing a vital role in Niagara's, Ontario's and Canada's tourism industry – it is a key part of building tourism back up. Niagara Parks, as an agency of the Ministry of Heritage, Sport, Tourism and Culture Industries (MHSTCI), has provided input to the Minister's economic and jobs recovery plan. A balanced approach will be implemented to offer a range of great guest experiences to support demand generation (visitation), keep as many staff working as possible (good for the local population), support Niagara and Ontario suppliers (good for the economy) and reduce non-essential functions.

Recent economic updates from the federal Department of Finance and the Ontario Ministry of Finance indicate that the global economic environment remains uncertain and the severity of the economic impact will depend on how widespread the outbreak becomes and how long it lasts. This forecast supports Niagara Parks' expectation of a significant decline in revenues through the planning period. With international border closures continuing into September 2020, Niagara Parks is forecasting only domestic visitation to Ontario for 2020-21.



To achieve its vision, Niagara Parks will leverage new offerings for the benefit of people who travel, the economic and social well-being of the local communities they visit and the preservation of cultural and heritage assets, while ensuring that efforts are mutually reinforcing its core values and ensuring long-term success through the four themes outlined in the strategic plan.

Niagara Parks' 10-years strategic plan serves as a blueprint to balance Niagara Parks' potential to achieve excellence on the world stage with a mandate to preserve its natural, built and cultural heritage while enhancing quality of life and well-being by delivering phenomenal experiences.

1.4 Key Priorities

Niagara Parks has ambitiously developed a list of key priorities to implement over the next 10 years which are highlighted in Section 5 of this business plan. While all the factors that will impact the plan are unknown, Niagara Parks clearly understands the need to be flexible, innovative and action oriented.

Niagara Parks' achievements in 2019-20 and its focus in the 2020-23 business plan support the activities of the MHSTCI through several initiatives.

During 2019-20, work was completed on the following key strategic plan initiatives:

- Construction of Phase I of the redevelopment of Table Rock Centre
- Planning for the adaptive re-use of the decommissioned Canadian Niagara Power Generating Station
- Incremental completion of the Queen Victoria Park (QVP) master plan – landscaping at Table Rock and QVP
- Continued implementation of the brand strategy and year two of the three-year sales and marketing plan
- Implementation of transportation and wayfinding plans, including pedestrian linkages and crosswalks
- Development and implementation of early stages of a waste and recycling strategy and diversion capabilities
- Development of enhanced visitor experiences through music, art and indigenous initiatives
- Key technology investments to modernize Niagara Parks' corporate systems
- Planning for redevelopment of the Niagara Parks Marina at Miller's Creek



These current and future projects and activities are more fully described in Section 5 of this business plan. These priorities continue to support a dynamic business environment that builds vibrant communities, attracts tourists, strengthens the economy and creates jobs.

In its operating budget for the year ended March 31, 2020, Niagara parks achieved a net surplus of \$13.063 million for the year. Highlights of the financial results for Niagara Parks for the year ended March 31, 2020 and the budget for fiscal years 2021-23 are summarized in Table 1.1 below.

	CURRENT FISCAL YEAR			FUTURE YEARS			
	BUDGET		ACTUAL	VARIANCE TO BUDGET		BUDGET	
	Apr. 2019	Apr. 2019	Apr. 2019	Apr. 2020	Apr. 2021	Apr. 2022	
	Mar. 2020	Mar. 2020	Mar. 2020	Mar.2021	Mar.2022	Mar.2023	
Total Revenue	\$ 126,597	\$ 127,306	\$ 709	\$ 53,972	\$ 97,081	\$ 122,286	
Total Expenses	\$ 104,365	\$ 102,592	\$ (1,773)	\$ 69,272	\$ 86,047	\$ 102,187	
Net Surplus Before Interest & Depreciation	\$ 22,232	\$ 24,714	\$ 2,482	\$ (15,300)	\$ 11,034	\$ 20,099	
Loan Interest	\$ 1,104	\$ 1,104	\$ -	\$ 1,072	\$ 980	\$ 750	
Depreciation & Deferred Stimulus Funding	\$ 10,315	\$ 9,914	\$ (401)	\$ 11,183	\$ 13,260	\$ 14,705	
Net increase in Power Plant Obligation	\$ 705	\$ 633	\$ (72)	\$ 575	\$ -	\$ -	
Annual Net Surplus	\$ 10,108	\$ 13,063	\$ 2,955	\$ (28,130)	\$ (3,206)	\$ 4,644	



2.0 Mandate

The Niagara Parks Commission operates under the provisions of the Niagara Parks Act, R.S.O. 1990, Chapter N.3. Section 4 of the Act states “It is the duty of the Commission to manage, control and develop the Parks...” It also provides a list of 15 general powers and duties.

The Niagara Parks Commission is classified as a board-governed operational enterprise provincial agency of MHSTCI. Since its founding in 1885, Niagara Parks has been guided by two key principles:

1. Niagara Parks should not become a permanent financial burden on the Province. Niagara Parks operates in a self-supporting manner without the aid of operational government funding; and
2. Access to the lands of Niagara Parks is to remain as free to the public as possible.

2.1 Niagara Parks’ Mandate

To preserve and promote the natural and cultural heritage along the Niagara River corridor.

Niagara Parks is committed to delivering commercially successful products in a way that ensures benefits for everyone – people who travel, the local communities, Ontario and Canada along with the respective natural, social and cultural environments.

2.2 Stewardship

The stewardship role assumed by Niagara Parks remains significant to its accountabilities since its inception. Niagara Parks is expected to preserve and commemorate the historical, cultural and environmental significance of the Niagara River corridor. In fulfilling this important public mandate, Niagara Parks provides myriad public and community services and assumes an important cultural stewardship role on behalf of the Province of Ontario.

Niagara Parks’ Heritage Identification and Evaluation Process has received Ministry approval, under the Standards and Guidelines for Conservation of Provincial Heritage Properties (Ontario Heritage Act). This process demonstrates Niagara Parks’ continued commitment to the stewardship of Ontario’s provincial heritage properties and partnership in implementing standards and guidelines.

2.3 Agencies and Appointments Directive

Niagara Parks operates within the accountability framework of the province as set out in the Agencies and Appointments Directive. This directive outlines the various accountability mechanisms to be established between an agency and its relevant ministry, including the development of a



memorandum of understanding and the submissions of annual reports, annual multi-year business plans and quarterly risk assessments. Also included is a requirement for external audits to be completed and procedures for financial reporting and periodic reviews.

In accordance with this directive, Niagara Parks has been classified as a board-governed, operational enterprise provincial agency of MHSTCI, which provides the authority for Niagara Parks to make operating decisions. As a board-governed provincial agency, the Niagara Parks Commission has the financial and operating authority to carry on business and conduct operations in support of its mandate. The Board is accountable to the Minister of Heritage, Sport, Tourism and Culture Industries for the achievement of its mandate and the Chair is the Board's representative to the Minister.

2.4 Operational Enterprise Classification

Niagara Parks is further classified as an operational enterprise which provides the authority for Niagara Parks to sell goods or services to the public in a commercial manner and to receive revenues from its commercial activities. Niagara Parks' classification as a board-governed operational enterprise provincial agency affirms the government's intent and expectations for Niagara Parks to pursue sound fiscal management strategies. By operating its own commercial facilities and by negotiating agreements with others, Niagara Parks has been able to generate the profits necessary to fulfill its self-sufficiency principle and its significant stewardship responsibilities. By structuring Niagara Parks as an economically self-sufficient organization reporting to MHSTCI with oversight and control placed in the hands of an appointed Board, Niagara Parks effectively operates for the benefit of the people of Ontario.



2.5 Values

Recently, Niagara Parks updated its corporate values. The new values are “**INSPIRED**”, an acronym that is both memorable and meaningful while continuing to be representative of what Niagara Parks stands for.

The values are:

Integrity – transparency, accountability, ethics and honesty at the root of all that we do

Needs – aligning products and services with the changing needs of guests, providers and contributors

Safety and Security – of staff, guests and Niagara Parks property

Participation – employee and team input and engagement that results in the effective delivery of consistent, high-quality products, services and experiences

Innovation – that creates exciting and lasting memories for guests

Respect – In all interactions between and amongst Commissioners, staff, guests and stakeholders

Environmental Responsibility – for the protection of our natural, cultural and heritage assets

Diversity and Inclusion – a meeting point for world travellers of many cultures where every guest and staff member is made to feel welcome, understood, valued and respected

The acronym “**INSPIRED**” is a motivating word that garners excitement. The next 10 years is anticipated to be a time of excitement as the Strategic Plan spurs renewal and growth while positioning Niagara Parks to become **one of the most spectacular Parks in the world**.

2.6 Ministry Goals and Objectives

On its website, the MHSTCI states that it “...works closely with the tourism sector to help stimulate economic growth and investment and create an environment that allows Ontario to compete successfully in the rapidly changing world of travel and leisure. Among our activities to strengthen Ontario as an internationally- recognized tourist destination:

- “We undertake vital market research in the areas of marketing, product development, and investment to aid business decisions by both governments and industry.
- “We encourage private sector investment and new product development to expand Ontario's tourism sector and promote regional tourism economic development.



- “We support and facilitate the development of new experiences and destinations.
- “We market Ontario as a tourist destination.
- “We invest in Ontario's tourism agencies.
- “We work with industry and organizations to support the maintenance and growth of the tourism's economic contribution.”

Niagara Parks directly supports the activities of MHSTCI with the goals and objectives outlined in the 10-Year Strategic Plan. Many of the projects rely on market research to enable sound business decisions. Some projects will result in new or updated programs and attractions (e.g. adaptive re-use of Canadian Niagara Power Generating Station, Indigenous tourism plan, work with tourism organizations and sister agencies, etc.) which supports MHSTCI's position to encourage and support new experiences and product development to expand the tourism sector and promote regional tourism economic development.

Niagara Parks will continue its environmental and cultural stewardship roles in preserving Niagara Parks lands and heritage features. Niagara Parks' three-year operating budget and 10-year capital plan incorporate financial self-sufficiency through revenue growth, management of expenses and improving the state of Niagara Parks' assets through capital investment.



3.0 Environmental Scan

Niagara Parks had another year of growth in fiscal 2019-20, including increased attendance and revenue. The continued growth over the past few years has enabled Niagara Parks to invest in capital repairs, tackling deferred maintenance, while renewing a number of revenue-producing operations. One key example in fiscal 2019-20 was completing phase one of Table Rock's redevelopment. This project was completed on time and on budget and has provided an enhanced guest experience, befitting of Niagara Parks' position as a global tourism destination.

For fiscal 2020-21, Niagara Parks will continue to implement the 10-year Strategic Plan, including projects such as completing phase two of Table Rock's redevelopment, advancing the Queen Victoria Park master plan, investing in environmental stewardship initiatives, developing a cycling plan, growing public programming, creating opportunities for year-round tourism and implementing new systems such as the new finance system, human resources recruitment and retail point-of-sale upgrades. The principal focus will be on three key projects – the completion of phase one of the adaptive re-use of the Canadian Niagara Power Generating Station, the completion of the Table Rock renovation and the implementation of the new Enterprise Resource Planning software.

The pursuit of these strategic initiatives during the course of this business plan will facilitate increased visitation and appreciation of Niagara Parks as a key tourism, natural heritage and cultural destination.

3.1 Fiscal Outlook

Previous fiscal outlooks have been altered due to the impact of COVID-19. As such, Niagara Parks will continue to monitor updates from the province and other key outlets like the Bank of Canada.

3.2 Digital and Marketing Trends

Macro Trend: Experiential Travel

According to the Skift 2018 Mega-Trends Report, two of the most important and co-related travel experience trends are the need for brands to become experience platforms, and the need for travellers to have experiences that provide a sense of personal fulfillment.

Regarding travel brands, the trend identifies the increasing need for travel brands to play a role in multiple aspects of a traveller's experience (e.g. AirBnB moving beyond simply accommodations, and into providing local tour information and services).



Regarding the traveller’s need for a sense of fulfillment from travel, this identifies the need for experiences to help travellers re-explore themselves as well as their destination, to rediscover themselves and what matters to them.

The table below shows marketing trends and opportunities for Niagara Parks:

Trends	Opportunities
<p>Storytelling: This remains a large part of the authentic equation. Destinations and attractions must continuously communicate relevant information and news about their offers. Travellers want to be intrigued by what they are buying. Visual content, photos and video are the best way to tell Niagara Parks’ story.</p>	<ul style="list-style-type: none"> • Expansion and continued development of in-house Niagara Parks content for digital, social, and traditional mass sharing • Travel media partnerships for storytelling by influencers and online travel/topic related media and sites • Enhanced partnerships with online travel agencies to ensure reinforcement of brand and story via third-party sellers of our products
<p>Wellness/Active/Health Conscious Travel: This category of experiences encompasses anything from self-directed physical fitness activities, to planned recreational tours, or travel based on health and overall mental, physical and emotional well-being. Satisfaction is derived as much from exploration as it is from accomplishment, whether it be a cycling excursion, a marathon, or a mindfulness retreat.</p>	<ul style="list-style-type: none"> • Enhanced walkability and pedestrian experience • Expansion of Namaste Niagara program, or creation of programs like it • Increased partnerships with health and wellness organizations and special events • Development of comprehensive recreational cycling strategy • Travel media programs with wellness influencers
<p>Continued interest in food and drink: Culinary experiences continue to be big draws, with Cooking Classes and Food Tour type programming dominating according to TripAdvisor. Overall food and drink experiences continue to be prime motivators for travel, particularly with specific demographic groups and particularly with broader interpretations of “adventure” (see below).</p>	<ul style="list-style-type: none"> • Continued development of Niagara Parks Culinary brand and in-house culinary services and offerings • Continuation and enhancement of programs and special events like Pop-up Dinner Series and Apprentice Dinner • Development of unique marketing campaigns/programs that position Niagara Parks as a regional culinary leader • Partnerships with external food brands, whether providers or personalities, to enhance our brand’s prominence • Continued exposure in food media and among food media influencers

Trends	Opportunities
<p>Changing Definition of Adventure Travel: The definition of adventure has shifted from the “hard adventure” perception of risky activities, to an overall theme of cultural experiences and exploration, ranging from food tours, local market and urban exploration, traditional “soft adventure” activities, and cultural/historical exploration. This speaks to a rise in interest in authentic experiences and the discovery of something new, even if relatively safe.</p>	<ul style="list-style-type: none"> • House Brand and product portfolio position Niagara Parks well to leverage changing definition of “adventure” • Further development and redevelopment of Niagara Parks Heritage sites and stories, including Indigenous storytelling, Underground Railroad narratives and architectural heritage • Further development of special events leveraging our unique locations and including multi-faceted programming
<p>Sustainable Tourism and Volunteerism: As the world gets more crowded and the impacts of travel and mass tourism are becoming more prevalent, the importance of both leaving a low travel/tourism impact for the destination and traveler alike are increasingly important. Similarly, for the traveller this can be offset by the impression of giving back to the destination via “voluntourism,” while for the destination this fulfills both work projects at a lower cost and the need to provide unique travel experiences.</p>	<ul style="list-style-type: none"> • As environmental stewards, particularly as defined via Niagara Parks’ Nature & Gardens house brand, Niagara Parks has a breadth of opportunity to create programming and events surrounding voluntourism • Content creation for web, social and physical collateral surrounding our sustainability initiatives • Refining our environmental brand positioning



4.0 Strategic Directions

The 10-year strategic plan is a blueprint to Niagara Parks' potential to achieve excellence on the world stage as one of the most spectacular Parks in the world with its mandate to preserve the natural, built and cultural heritage.

The strategic plan, as developed and launched in 2018, supports Niagara Parks' founding principles of financial self-sufficiency and as free as possible public access by increasing revenue and employment opportunities, ensuring ongoing maintenance, preserving the Niagara River corridor and the economic well-being of the region.

4.1 Niagara Parks' Vision Statement

By 2028, Ontario's Niagara Parks will be:

- A welcoming, accessible and inspiring place offering world-class natural, historical, and authentic experiences
- An innovative example of sustainability as the environmental and cultural stewards of the Niagara River corridor
- A source of national pride and identity
- One of the most spectacular Parks in the world

4.2 Strategic Plan Themes

Theme 1 – Preserving and showcasing our rich heritage, culture and lifestyle

- Develop and implement a compelling brand strategy
- Promote Niagara Parks' environmental and cultural stewardship role
- Develop a new sales and marketing plan

Theme 2 – Leveraging and activating our natural wonders and iconic experiences

- Understand visitor expectations of what defines a great experience
- Align current and future experiences with visitor profiles
- Product and market development of year-round experiences
- Provide seamless linkage and/or choices to visitors
- Develop land management strategy



- Ensure accessibility at all Niagara Parks sites
- Develop sustainable tourism expansion

Theme 3 – Supporting a dynamic business environment with a focus on attracting investment, connection to local communities, job creation and economic well-being

- Identify key stakeholders
- Define and formalize relationships

Theme 4 – Taking experiences and hospitality to the next level

- Self-sustaining finances
- Review lines of business
- Efficiency and effectiveness of processes/systems for continuous improvement and innovation
- Creating a safe environment for visitors and staff
- Support excellence in recruitment and retention strategies
- Support development of staff and acquisition of new skills

4.3 Strategic Focus: 2020-23 High-Level Priorities

The following are the key 2020-23 priorities that Niagara Parks will be focusing on to implement its strategic plan. Due to the decline in revenues from the global impact of the COVID-19 pandemic, the implementation of some of these initiatives may be delayed, unless grant funding becomes available to complete them as originally planned:

- Redevelopment of the decommissioned Canadian Niagara Power Generating Station (CNPGS)
- Table Rock Redevelopment (complete Phase II – Fast Casual; Journey Behind the Falls entrance; Horseshoe Landing Patio)
- Attraction Renewal: Aero Car cable car and arch replacement
- Queen Victoria Park concept master plan
- Improvements to the site in the areas immediately surrounding Table Rock, Falls Parking and CNPGS, including cycling routes
- Implement a new Enterprise Resource Planning (ERP) software to modernize Niagara Parks' aging financial systems



- Implement year two of the three-year sales and marketing plan
- Promote Niagara Parks' environmental and cultural stewardship roles
- Develop a new model for the School of Horticulture
- Analyze and implement security and business continuity plan for Niagara Parks
- Invest in staff training and developing a diversity plan

In addition, the following 10-year strategic initiatives will move forward:

- Niagara Parks Marina at Miller's Creek
- Power Plants (Toronto and Ontario power generating stations) – 2021-22

Further details on these current activities and implementation plans can be found in Section 5 of the business plan.



5.0 Current and Future Programs, Activities and Implementation Plans

In 2019-20, Niagara Parks implemented initiatives outlined in its approved business plan. This section provides details on those projects and new initiatives identified in the strategic plan and a summary of upcoming renewals for Revenue-Generating Operations (RGOs) provided through third parties.

The programs and activities that are within the scope of this three-year business plan are summarized below, including a notation if they are funded through capital or operating budgets.

Redevelopment of the Decommissioned Canadian Niagara Power Generating Station (Capital: 2019-22)

Niagara Parks is moving forward with the adaptive re-use of CNPGS into a multi-faceted visitor attraction that is innovative, iconic and year-round; will increase visitation to Niagara; and, will provide a new source of revenue. The Niagara Parks board approved moving forward with the adaptive re-use of CNPGS as a Niagara Parks attraction at its June 2019 meeting.

The adaptive re-use of CNPGS into a multi-faceted visitor experience offers Niagara Parks the opportunity to achieve the following objectives:

- preserve and showcase this culturally significant heritage landmark
- implement with sustainable building solutions
- create an innovative and iconic, year-round visitor experience
- increase visitation to Niagara Parks and Niagara in general
- introduce a new demand generator
- provide an economic driver for additional jobs
- provide a new source of revenue for Niagara Parks to support its mandate of financial self-sufficiency

A phased opening is planned, with a main floor attraction, building tours and evening immersive multimedia show scheduled to open July 2021, and the addition of a tunnel attraction set to open in July 2022. Based on Niagara Parks' experience with Journey by the Falls and White Water Walk attractions, the CNPGS attraction is expected to generate a net surplus that is sufficient to fully fund the estimated annual loan payments.

Niagara Parks has engaged attractions consulting firm, Forrec Ltd., to prepare a concept master plan that takes into account the pathways and access to the building, connections to parking,



ticketing and queueing, an entrance with a sense of arrival, as well as retail and culinary opportunities and basic guest services, such as washrooms and other comfort items.

Table Rock Redevelopment (Capital: 2017-21)

Based on the planning and design work completed in 2017-18, Niagara Parks initiated a three-year redevelopment of Table Rock Centre commencing in the fall of 2018. The objectives of the redevelopment are to:

- Position Table Rock as Niagara Parks' flagship building and node
- Provide a sense of arrival and pride of place
- Support and enrich Niagara Parks' mandate and brand
- Identify environmental and cultural heritage storytelling opportunities within Table Rock
- Offer an overall themed experience by featuring a variety of visitor-centric products, services and experiences by renewing the retail, culinary and attraction experiences within Table Rock
- Consider the points of connection from Table Rock to Queen Victoria Park and the rest of Niagara Parks
- Generate a significant rate of return on Niagara Parks' capital re-investment and minimize planned or unplanned maintenance costs
- Grow revenues at Table Rock to contribute to Niagara Parks' self-sustaining operations

Phase I of the reconstruction was completed in April 2019 and included renovations of Table Rock House Restaurant (formerly Elements Restaurant) and Table Rock Shop. Phase II of the project was in the detailed design process throughout 2018-19, construction commenced in November 2019 and substantial completion occurred in late June 2020. This phase included transforming the quick-serve operations on the main floor to an upscale fast casual experience with expanded indoor seating; improvements to the upper outdoor patio; improvements to the Journey Behind the Falls attraction's queueing and entrance and the enclosure of the west concourse.

In addition to the main redevelopment project, work was planned to upgrade and enhance the experience of the Journey Behind the Falls attraction with an upgraded LED lighting solution and audio capabilities in the tunnels. This phase of the project is delayed until revenues return to previous levels, unless grant funding becomes available to complete the project.

The Table Rock Redevelopment project is also integrated with the QVP master plan process, as the coordination of the development of exterior and interior spaces at Table Rock Centre is vital to that



flagship location. This work includes landscaping and pathway redevelopment. This phase of the project will also be delayed, unless grant funding becomes available.

Attraction Renewal (Capital 2019-27)

Niagara Parks continues to invest in capital improvements to its attraction facilities to enhance visitor experience and improve accessibility. Over the next three years, depending on recovery of revenues from the pandemic impact, Niagara Parks will be implementing improvements to:

- Aero Car: repairs/replacement to cable car and arch

Queen Victoria Park Master Plan Implementation (Capital: 2018-28)

In fiscal 2018-19, Niagara Parks engaged a consultant to develop a concept master plan for Queen Victoria Park, defined as encompassing Niagara Parks lands from Kingsbridge Park in the south to Rainbow Bridge in the north, west along the moraine and Oak Hall, Portage Road and the Niagara River to the east. Niagara Parks engaged with the public and stakeholders to gain input that informed the development of the plan. The Niagara Parks board approved and adopted the Master Plan in September 2018.

The plan is an illustrative document that sets forth high-level, phased improvements to make Niagara Parks one of the most spectacular parks in the world. As a concept plan, it does not include detailed design. It does, however, include structured guidelines for the implementation of the proposed improvements over the 10 years of the plan. The plan provides the opportunity to better understand and re-frame the way that guests can physically and intuitively connect with the falls and the rich cultural landscape that defines the Parks. It identifies areas for protection and enhancement as well as new opportunities for site re-organization, connection and flow, innovative design, new programming and revenue generation.

The key objectives of the plan are to:

- Improve and enhance the overall public realm and functionality of the Parks by:
 - Strengthening the experiences of millions of guests (more walkable, accessible, cycling, transit-friendly, safe and secure ways of moving people) throughout QVP with convenient connections to the 56 kilometres of Niagara Parks' lands and adjacent destinations such as urban centres, wine routes, escarpment, towns and villages, rural landscapes, etc.
 - Reinforcing the pre-eminence of the Niagara Parkway to tell the complete Niagara Parks story

- Establish a new benchmark for guest experience with a range of unique moments stretching north and south of Table Rock that include activating underutilized areas, establishing a hierarchy of spaces for a range of events, creating new opportunities for revenue growth that support increasing margins and providing diverse venues and seasonal interest for events and programming year-round
- Identify opportunities to celebrate, enhance, create and integrate ecological spaces and habitat, improving resiliency to climate change, increasing our natural capital and protecting valuable natural resources and ecosystems for the future
- Showcase Queen Victoria Park's rich and unique cultural heritage
- Exhibit sustainable best practices and climate change leadership through innovative design, robust materials and low maintenance and cohesive management frameworks
- Protect, enhance and establish new view corridors, vistas and visual connections and iconic views toward the falls, strengthening our national identity
- Develop a coherent 10-year concept master plan with short-, medium- and long-term goals commensurate with Niagara Parks' 10-year priorities
- Maximize opportunities showcasing cultural heritage assets with a focus on taking guest experiences to the next level

Now that the plan is in place, the focus shifts to detailed design and implementation based on the nodes and priorities outlined in the concept master plan including the expansion of the promenade.

For 2020-21, the focus is on implementing improvements in the area immediately surrounding Table Rock and the vicinity of Falls Parking and the Incline and includes designing improvements to cycling paths in the core area. The Plan is also informing the design of the welcome plaza on the north side of the Canadian Niagara Power Generating Station. Planning and design for phase one open space and public realm improvements will be undertaken on the Queen Victoria Park event field in preparation for the 2021 Canada Games celebration ceremonies. Grant funding may be required to complete the work.

Grand View Marketplace Welcome Centre (Capital: 2021-25)

The Grand View Plaza offers a mesmerizing view the falls and draws millions of visitors each year because of its spectacular view. Grand View Plaza is ready for an update to become a world-class destination plaza and welcome centre, with quality retail and food and beverage experiences that make people linger longer and bring people back and to meet the demands and expectations of guests to the boat tour and zipline attractions. The Grand View Plaza is one of three anchoring nodes in the QVP concept master plan. Should grant funding become available, Niagara Parks will



commence the design process, with a goal of having architectural drawings completed by March 2023 and construction completed by April 2025.

Key design objectives will be to:

- Create an iconic arrival experience and first touch point to Niagara Parks' offerings
- Enhance heritage views and vistas, with four-season interest
- Modernize and elevate the design quality of the plaza and improve circulation
- Improve visitor experience for line-ups to the boat tour and zipline attractions
- Open and flexible area for events
- Enhance the public gardens and botanical stories of the Niagara Parks systems
- Easy maintenance, robust materials and consideration for snow clearing and removal, waste disposal and collection and servicing

Floral Showhouse Production Relocation (Capital: 2020-23)

The Floral Showhouse occupies a place of prominence within the park, centred between the heritage power stations. Greenhouses and garden outbuildings were constructed at the current site, starting in 1894. Expanded in 1909, the contemporary atrium was added in 1980. The intricate horticultural displays within and surrounding the Floral Showhouse are a source of pride for Niagara Parks. The existing Grove parking lot currently holds 300 cars and is typically at capacity during peak season. The QVP master plan calls for the relocation of the glasshouses, production facilities and major works yard to other areas within Niagara Parks to amalgamate the horticultural operations for Niagara Parks and improve efficiency. The exterior display gardens would remain and be enhanced, providing a green buffer and destination adjacent to the enhanced and expanded flexible Grove parking lot. The Floral Showhouse atrium and select structures would be maintained as pavilions for events and gatherings in various seasons. Should grant funding become available, during 2021-22, Niagara Parks will begin design of a new production area at Niagara Parks Botanical Gardens and greenhouse production relocation would take place in 2022-23.

Recreational Cycling Routes (Capital: 2021-23)

Within the QVP concept master plan, Niagara Parks has included plans to create and maintain an active transportation network to allow cycling guests to navigate between attractions and key destinations in a safe and enjoyable way. Where possible, the recreational route will be separated from pedestrian and vehicular travel routes to minimize conflicts between path users. The cycling route will be tied into key internal and external nodes that will complement the bicycle routes with additional infrastructure such as seating areas, bicycle racks, bicycle rentals, watering and repair



stations and wayfinding. Niagara Parks will coordinate linkages with Niagara Region, the City of Niagara Falls and Metrolinx. As a result of the COVID-19 pandemic's impact on revenues, this project can only move forward in the business plan period if grant or infrastructure funding is provided.

Implementing a New Enterprise Resource Planning (ERP) Software to Modernize Niagara Parks' Financial Systems (Operating and Capital: 2019-21)

During 2019, Niagara Parks acquired a new software solution from Unit 4 Business World (UBW) and began implementation. The implementation of UBW is planned to take approximately 18 months, with a go-live date of April 1, 2021. As part of the implementation, which replaces the Epicor software acquired in 1999, Niagara Parks will review financial and procurement processes across all departments and business units and redesign them to take advantage of the efficiencies and improved controls available in the new UBW software. On October 10, 2019, the Board approved the Finance & Audit Committee's recommendation to proceed with entering into agreements with Unit 4 Business Software Corporation for Unit 4 Global Cloud Service Solution financial software and ERP Connex Inc. for implementation support as the preferred vendor response to RFP-01-2019-LP in order to invest in a new financial system for Niagara Parks. As contractual commitments have been made and the implementation is well underway, this project is continuing within the existing revised budget.

Sales and Marketing Plan (Operating: 2019-22)

The three-year sales and marketing plan (SMP) was a key deliverable in both Niagara Parks' 10-year strategic plan and the 2018-19 business plan. The Commission approved the SMP at its meeting on October 19, 2018. The SMP will guide Niagara Parks' efforts to increase the number and types of visitors to Niagara Parks and to enhance overall revenues. The SMP will be coordinated with Niagara Parks' new Brand Enrichment Plan (BEP) which focuses on deepening the relationship with visitors throughout their travel cycle. The SMP will fully consider ways to integrate digital platforms to connect with visitors before, during and after their travel journey. The core of Niagara Parks visitors will continue to be regional, Ontario, Canada, U.S. and international travellers (as these markets return) that seek travel experiences to enrich their lives. The four objectives of the three-year SMP are to:

- Position Niagara Parks' brand story
- Grow visitation
- Target high-yield markets
- Increase revenue



Road maps have been developed for each objective, including strategies and tactics across all three years of the plan.

A key focus of 2020-21 will be to:

- Implement year two of the three-year SMP
- Continue to undertake new guest research, identifying generational, travel, marketing and visitation trends industry-wide
- Advance Niagara Parks' brand strategy, auditing Niagara Parks' digital content and physical collateral and staff training programs to ensure alignment with the brand strategy
- Increase targets of online social channels and monitor effectiveness of organic vs paid content and review effectiveness of social engagement media monitoring services contract
- Leverage Phase 2 of Table Rock's redevelopment – fast casual improvements; develop and launch evening event at Table Rock Centre, such as an art exhibit or culinary event to showcase second phase of development
- Continue to increase tour and travel trade sales with increased initiatives including outbound sales calls, attendance at trade shows and participation in sales missions in key domestic and international markets
- Increase sales from Online Travel Agencies (OTAs) and leverage market growth and development from tour operators and high-value overseas international markets, once international leisure travel resumes
- Grow high-yield specialty markets targeting wedding, social and conference business event groups that generate high-yield revenue in all seasons including spring, fall and winter need periods
- Increase seasonal multimedia promotional campaigns for spring and fall sessions
- Implement Phase 3 of Niagara Parks' wayfinding strategy
- Deep dive into individual steps in visitor engagement cycle and consider updates to influences, such as environmental, cultural or technological factors
- Enhance investments for promotions, digital media and staff resources
- Engage publicist in Toronto to pitch stories to key Ontario based travel media and attend key travel media shows
- Work with Destination Canada, Destination Ontario, Niagara Falls Tourism and the Tourism Partnership of Niagara to support tourism in Niagara and Ontario



Niagara Parks will continually work with others to identify product and promotion opportunities including ways to leverage milestone events, such as the Canada Games coming to Niagara in 2021.

Environmental Stewardship (Operating: 2019-22)

Niagara Parks is updating its stewardship initiatives to mitigate the impacts of climate change and the Emerald Ash Borer by diversifying Niagara Parks' natural areas and habitats while providing superior eco-tourism opportunities. Initiatives include a park-wide urban forest management strategy that guides tree selection, locations for mass planting and management of existing vegetation, including removals to preserve key viewing areas.

Niagara Parks has established performance improvement targets for its urban forest:

- to increase the urban forest tree canopy to 35% by 2028 (trees planted)
- to increase the native plant coverage along the Niagara River shoreline to 75% by 2028 [annual distance of shoreline (km) restored to native plants, improving the quality and quantity of native shoreline vegetation through proactive management]

Niagara Parks has established waste diversion targets that will reduce waste going to the landfill by achieving 35% waste diversion by 2020 and 50% by 2028. A cross-organization Environmental Services committee will actively participate in an integrated waste management system which reuses, reduces and recycles materials including implementing recycling and composting programs. The committee will identify and recommend/implement initiatives to minimize waste and increase diversion at applicable Niagara Parks facilities through collaboration to identify and recommend/implement environmental initiatives that build towards a zero-waste eco-friendly culture at Niagara Parks.

Other environmental initiatives:

- Continue to work with Brock University to advance stakeholder engagement within Niagara and beyond on Niagara Parks' environmental stewardship remediation and innovation programs including finalization of environmental stewardship strategic plan in 2020
- Develop additional partnerships with other institutions such as Ontario Trails Council and McMaster University for research and implementation of environmental stewardship programs
- Develop and implement a viewpoint management strategy in combination with the shoreline habitat restoration program



Cultural Stewardship (Operating: 2019-22)

Cultural stewardship encompasses heritage; events, programming and sponsorships; Indigenous experiences; and public art. Programming at Niagara Parks enriches the visitor experience, sparking curiosity to explore and providing compelling reasons to visit and return, thereby enhancing Niagara Parks' competitiveness and reputational positioning.

Goals for 2020-21 include:

- Develop Indigenous experiences at Niagara Parks in partnership with Landscape of Nations 360°, including site-specific programs, educational initiatives, exhibits and authentic tourism offerings utilizing and promoting existing assets
- Support the vision to be one of the most spectacular Parks in the world by presenting exceptional programming that activates Niagara Parks unique spaces, captures attention and connects with audiences (small in-park programs or via virtual platforms)
- Create a new programming strategy that encompasses programming across Niagara Parks
- Review and expand educational offerings at heritage sites to enrich learning and increase engagement
- Support destination activations, including Winter Festival of Lights
- Build interpretive capacity to support the opening of Canadian Niagara Power Generating Station in 2021

School of Horticulture (Operating: 2019-22)

Development of a new model for the School of Horticulture that responds to the rising requirements of the horticultural and park workplace, Ontario's higher education competitive environment and the Commission's strategic commitment to excellence. The mission of the school to recruit and develop, to recognized academic and professional standards, the next generation of horticulture business specialists and leader/administrators. The guiding principles for the new program include:

- Continue to provide hands-on "experiential horticulture" through a year-round schedule located in the Botanical Garden
- Leverage the strength of Niagara Parks to provide financial and organizational support from an internationally recognized park system known for its excellence
- Deliver programs through small class sizes allowing for personal interaction with faculty
- Deliver curriculum subject-related resources and standards that meet those of the public colleges



The new three-year program model will focus all horticulture courses related to experiential learning within the first two years of the curriculum and be offered as a separate 'two-year diploma'. The third year provides an opportunity for students completing the first two years of study or transfer students from related college two-year diploma program or baccalaureate programs to obtain a Niagara Parks Graduate Certificate. This third-year option leverages the School's mentored specialization, adds richer management/leadership curriculum and experience, builds in the internship and international travel requirements and broadens exposure to other areas the Niagara Parks operations. The flexibility in the program offers the advice, special coaching, independent study and experiences to optimize preparedness for each graduate's chosen career.

Guest Safety and Security (Operating: 2018-22)

Niagara Parks will continue to implement plans to enhance safety and security to ensure a safe destination for all visitors and staff. Implementation of the security and emergency plan includes an ongoing review of building security, the river front promenade, vulnerable pedestrian/traffic areas and working with provincial and regional authorities, such as Niagara Parks Police Services' continued work with Niagara Regional Police Services, to proactively address safety and security. In 2019-20 Niagara Parks has implemented bag check programs at key attractions, added a second K-9 unit and increased the complement of constable and seasonal Provincial Offences Officers and enhanced patrols in Queen Victoria Park.

Growing the Talent (Operating: 2019-22)

Niagara Parks is committed to attracting and retaining a highly professional, motivated, engaged and satisfied workforce within a culture of teamwork, mutual respect and trust. This involves placing the right people with the right skills in the right places in order to promote continuous improvement and excellence.

Niagara Parks is a preferred employer in the Niagara region with a long-standing history of providing significant full-time, seasonal, student and apprentice employment opportunities. Niagara Parks values diversity and strives to be representative of our community and visitors. While Niagara Parks' workforce includes many diverse and cultural backgrounds, including over 25 languages spoken in addition to French and English, Niagara Parks is developing a strategy to ensure that the workforce is more representative of the community and visitors to Niagara Parks. An investment in staff as well as in a diverse and inclusive recruitment strategy are catalysts which attract the most talented applicants, and which retain a skilled and engaged workforce. A recruitment plan that addresses inclusion and provides equality of opportunities will be developed and implemented during this business plan period.



Staff training is also a key investment and Niagara Parks continues to provide a variety of training opportunities to staff, including dedicated leadership development and change management courses. In-house mentoring and training programs will be prioritized where possible in the coming year due to budget constraints.

Transportation Plan (Operating: 2018-22)

Niagara Parks will develop and implement a new transportation plan to coordinate the number of visitors to Niagara Parks now and in the future. The plan will consider traffic flow and connections, pedestrian-friendly amenities, including crosswalks, recreational trails, cycling, parking and health, safety and security concerns. A trail master plan and a possible refresh to the White Water Walk main building/entrance are other initiatives to improve pedestrian linkages. Niagara Parks will continue to coordinate its transportation needs with the Niagara Parks/City of Niagara Falls Visitor Transportation System (WEGO), Metrolinx, VIA/Amtrak, Niagara Regional Transit, airports and road networks.

Business Continuity Plan (Operating: 2020-23)

At its June 13, 2019 meeting, the Commission directed staff to begin development of a corporate-wide business recovery/continuity plan, taking into consideration the new risk management framework being implemented by the provincial government in the fall of 2019. This work will begin in 2020-21. An IT disaster recovery plan is already in place. Niagara Parks will conduct and document business impact assessments that encompass significant functions within the Commission and use the results to develop a business continuity plan. This will include recovery time and dependencies, key assets and documentation requirements and periodic testing through table-top exercises.

5.1 Third Party Investment Opportunities

While redevelopment of the CNPGS will be financed and operated directly by the Niagara Parks, Niagara Parks also plans to move forward with redevelopment of its other two decommissioned generating stations, Toronto Power and Ontario Power. Niagara Parks is requesting the assistance of Infrastructure Ontario to open these sites up to the market and seek third party submissions for development and operation, through a competitive procurement process.

Niagara Parks will also be seeking proposals for the future redevelopment options for Niagara Parks Marina at Miller's Creek



The outcome of this work is to support Niagara Parks’ mandate, enhance the overall programming, create new visitor experiences, generate additional revenues and/or reduce the overall liability of the Niagara Parks. Niagara Parks’ goal is to transform the decommissioned power plants and marina into welcoming, accessible and inspiring attractions that offer world-class, authentic experiences, and support Niagara Parks’ vision is to become one of the most spectacular Parks in the world.

Future significant capital programs and activities that are outside of the scope of this three-year business plan are listed below.

- Queen Victoria Park Building – condition assessment and renovation

5.2 Revenue Generating Operations Plan – Upcoming Renewals

Niagara Parks has several RGOs that are provided by third parties. RGOs provided by third parties are established through a competitive procurement process. Niagara Parks’ Procurement Policy requires development of a business case, reporting to the Board and inclusion in the annual business plan for any anticipated renewals or new RGO ventures being planned. Part of the business case evaluation approach includes an analysis of “make or buy”, as to whether Niagara Parks should continue to use a third party to operate the RGO, or to undertake providing the service directly.

Revenue Generating Operations	Expiry Date
Floral Clock Kiosk Rental	December 2020
License to Operate Automated Banking Machines	December 2020
Glow in the Dark Retail Items	January 2021
Viewing Machines	August 2021
Over the Counter Beverages	January 2022
Photo and Digital Capture Services	January 2022
Pay & Display Parking Machines	December 2022



6.0 Resources to Meet Goals and Objectives

Financial resources (operating and capital funds) for strategic goals are summarized below. Additional detail on Human, Financial and Technology resource considerations are provided in Sections 8, 10 and 11.

Table 6.1: RESOURCES TO IMPLEMENT STRATEGIC PRIORITIES (thousands of dollars)						
Strategic Themes & Key Priorities	Operating Budget			Capital Budget		
	2019-20	2020-21	2021-22	2019-20	2020-21	2021-22
Theme 1: Preserving and showcasing our rich heritage, culture and lifestyle	\$ 734	\$ 844	\$ 994	\$ -	\$ -	\$ -
<ul style="list-style-type: none"> Implement brand strategy to promote NPC regionally, nationally and internationally; Promote NPC's Environmental & Cultural Stewardship Role Urban Forestry Tree Planting Program Partnership with Brock University Indigenous Tourism Program Signature Event Strategy Expanded Waste & Recycling Program - North & South Parkway Enhanced Winter Festival of Lights Programming 						
Theme 2: Leveraging and activating our natural wonders and iconic experiences	\$ 100	\$ -	\$ -	\$ 20,500	\$ 5,000	\$ 5,000
<ul style="list-style-type: none"> Develop great, year round visitor experiences Land Management Strategy Queen Victoria Park master plan, including new approaches to traffic flow Redevelopment of Table Rock Centre, including retail stores, culinary operations and Journey & Fury Attractions Grandview Plaza renewal Transportation plan, including Metrolinx partnership and cycling strategy Wayfinding - Provide seamless linkage and choices Illumination, lighting, fireworks Improve cycling, pedestrian linkages, crosswalks Refresh White Water Walk building entrance 						
Theme 3: Supporting a dynamic business environment with a focus on attracting investment, connection to local communities, job creation and economic well-being	\$ 350	\$ -	\$ -	\$ -	\$ -	\$ -
<ul style="list-style-type: none"> Options for stabilization and phasing the adaptive re-use of historic power station buildings Options for redevelopment of Niagara Parks Marina at Miller's Creek 						
Theme 4: Taking experiences, services and hospitality to the next level	\$ 1,304	\$ 1,137	\$ 876	\$ -	\$ -	\$ -
<ul style="list-style-type: none"> Service Excellence & Innovation Guest Safety & Security - Crime prevention through design Analyze and implement NPC security and emergency plan Continue with modernization of financial software (ERP) Invest in staff training and change management Conform with new measures associated with the Strategy for a Safer Ontario Develop a recruitment plan that embraces inclusion 						
TOTAL	\$ 2,488	\$ 1,981	\$ 1,870	\$ 20,500	\$ 5,000	\$ 5,000



7.0 Risk Identification

Niagara Parks provides updates on risks to the Board’s Governance, Ethics and Human Resources Committee, the Board and MHSTCI. The Board has approved governing policies for enterprise risk management and internal control. This section summarizes risks and associated mitigation strategies as they affect the Business Plan over the three-year planning horizon.

7.1 Risk Category: Strategic/Policy Performance

Risk Factor:	Redevelopment of the decommissioned Canadian Niagara Power Generating Station on time and on budget
Description:	Resource constraints
Relation to Strategic Plan:	Leveraging and activating our natural wonders and iconic experiences (Theme 2); Developing great visitor experiences (Strategy 1); Product and Market Development of Year-Round Experiences (Strategy 3)
Impact and Scope:	Risk of insufficient funding to fulfill the master plan concept as proposed. Insufficient time to complete the works by July 2021.
Overall Risk Assessment:	Medium
Mitigation:	Business case prepared and reviewed with Ministry; borrowing approved by Board and Ontario Financing Authority; first advance received August 2020; Niagara Parks completing detailed engineering estimates of the stabilization components; Niagara Parks has extensive experience in attractions and undertaking significant construction projects. Niagara Parks will utilize existing Vendors of Record to complete the work; Niagara Parks working with Attraction Consultant, Forrec, to finalize scope and scale of attraction and financial requirements for July 2021 opening.
Risk Factor:	Implementation of Unit 4 Business World Enterprise Resource Planning Software (ERP)
Description:	Competing staff priorities result in staff resource constraints and inability to complete project within timelines



Relation to Strategic Plan: Taking experiences, services and hospitality to the next level (Theme 4); Efficiency and Effectiveness of Processes/Systems for Continuous Improvement and Innovation (Strategy 3)

Impact and Scope: Competing staff priorities result in staff resource constraints and inability to complete project within established timelines.

Overall Risk Assessment: Medium

Mitigation: Executive project management sponsorship support in maintaining priority of project. Project Charter and Business Case has been completed and department leads have been established, with a high level workplan to complete core financials by March 31, 2021. More detailed timelines to be developed by project management consultant, by January 31, 2020, following business requirements workshops taking place in Fall 2019.

7.2 Risk Category: Operational

Risk Factor: **Business case assessment for and aesthetic improvements at the Niagara Parks Marina at Miller's Creek**

Description: The marina is the only shoreline/water-based amenity on the south Niagara Parkway. Improvements to the area are a key contributor to the strategy of enhancing visitor experience by providing nodes of interest and complementary attractions.

Relation to Strategic Plan: Leveraging and activating our natural wonders and iconic experiences (Theme 2); Enjoying the experience of being here (Strategy 2); Develop land management strategy (Tactic 2)

Impact and Scope: Business Case Assessment: Infrastructure Ontario has been engaged to review the business case and to identify a viable business model for the proposed waterfront development opportunity. The current building and site require rehabilitation to prevent further deterioration and to ensure continued service to the boating public. The infrastructure is more than 50 years old.

Overall Risk Assessment: Medium



Mitigation: Business Case Assessment: reassess goals and objectives for the development; challenge expected outcomes for the development and positions on risk-sharing in the development agreement; a series of market soundings has been undertaken to identify both market opportunities and constraints on redevelopment opportunities; a financial model reflecting expected costs of the marina site development has been developed that provides the means of testing alternative agreement structures so as to identify how project costs and potential revenue sources are influenced under each alternative; alternatives for development of the marina and adjacent lands are being reviewed; identify a deal structure that can be incorporated in a Development Agreement/Lease to limit Niagara Parks' costs and mitigate exposure to project risks; compile the results from above and present a preferred recommendation for revising the procurement strategy to improve chances of retaining a development partner. IO developed a business case for Niagara Parks in 2018.

Aesthetic Improvements: removal of shrub growth along the fence and trimming of trees; clean-up of day use trailer parking area; removal of waste and shrub growth; installation of post and rail fence; café painted and updated with equipment and interior furnishings; front of the café and surrounding grounds will receive horticultural improvements.

7.3 Risk Category: Information Technology and Infrastructure

Risk Factor: Risk of cyber threats

Description: Global electronic threats increase with the use of the internet. Networks (like the Niagara Parks network) risk suffering a malware, ransomware or other malicious attack.

Relation to Strategic Plan: Taking experiences, services and hospitality to the next level (Theme 4); Deliver service excellence and innovation (Strategy 1); Creating a safe environment for visitors and staff (Tactic 6)

Impact and Scope: If Niagara Parks' network and information security is compromised by a cyber-attack, public confidence and revenues could be impacted.



Threats and attacks occur daily. Malware and ransomware continue to be the most common attacks detected by security experts. Malware analysis is time consuming and intensive. At Niagara Parks, attack surfaces are increasing with the deployment of Internet-of-Things (IoT), Software as a Service (SaaS) solutions and external application program interfaces (APIs).

Overall Risk Assessment: Medium

Mitigation: Use best in class second generation firewalls; use geo-blocking to block network traffic from countries that participate in state hacking; use threat intelligence data in security defenses; whitelist software; lock down devices' administrative privileges; implement a rigorous security checklist for SaaS providers and the security of IoT devices are challenged; use antivirus software; reduce reliance on point-to-point radios; use complex passwords and second factor authentication for remote usage; monitor and report staff's remote usage; use non-integrated POS payment processing and Moneris point-to-point encryption; incorporate PCI compliance requirements into procurement request specifications; train IT staff in security protocols; deliver best practice security messages to all users on Niagara Parks network and track employee acknowledgement of message; purchase cyber insurance coverage; monitor cyber threats as part of information security operations; and, create awareness and educate IT and other staff on threats and network security through the use of bulletins and free resources.

In November 2019, Grant Thornton auditors have provided the Attestation that Niagara Parks is compliant with PCI requirements as required by Moneris on behalf of the credit card brands.

7.4 Risk Category: All Other Risks

Risk Factor: **Contingent liabilities associated with Toronto Power Generating Station (TPGS) structural stabilization**

Description: Continued decline of TPGS and rising cost of restoration.



Relation to Strategic Plan:	Taking experiences, services and hospitality to the next level (Theme 4); Deliver service excellence and innovation (Strategy 1); Creating a safe environment for visitors and staff (Tactic 6)
Impact and Scope:	Failure of the TPGS could require immediate significant financial resources to stabilize and has reputational risk for Niagara Parks, Commissioners and Ministry. Also, financial risk related to value of Power Plant Obligation upon review of existing engineering studies and completion of additional studies.
Overall Risk Assessment:	High
Mitigation:	Critical maintenance work completed with Provincial and Niagara Parks funding. Additional funding was approved to complete the update of condition assessments. Power Plant Obligation valuation for financial report has been updated using AMIS condition assessment data and engineering reports completed during the year. Niagara Parks has engaged Infrastructure Ontario to develop a commercial and transaction strategy for adaptive re-use.
Risk Factor:	Safety and security of visitors in high traffic areas
Description:	Millions of visitors to Niagara Parks arrive each year, with a high concentration of guests in core areas during peak season.
Relation to Strategic Plan:	Taking experiences, services and hospitality to the next level (Theme 4); Deliver service excellence and innovation (Strategy 1); Creating a safe environment for visitors and staff (Tactic 6)
Impact and Scope:	With recent global threats to visitor safety at internationally recognized sites and high traffic areas, a proactive approach to implementing initiatives to maintain safety and security of staff and visitors is required.
Overall Risk Assessment:	Medium
Mitigation:	Niagara Parks Police Service, in conjunction with provincial authorities, continues to develop and implement a safety and security plan to enhance overall safety of staff and visitors in Niagara Parks. Imminent threat emergency exercise at Table Rock and lane closures in the Queen Victoria Park core area have been completed. The Queen



Victoria Park master plan considers permanent changes to transportation patterns through core areas in consideration of visitor experience and public safety. Further improvements to lands and facilities are to be designed using Crime Prevention through Environmental Design principles that encourage safety and discourage inappropriate behaviour. Bag checks have been implemented at Niagara Parks attractions with high volume attendance.

Risk Factor:	Business Interruption results in significant losses to revenue and impact to visitor experience
Description:	Business Continuity in the event of business interruption or disaster.
Relation to Strategic Plan:	Taking experiences, services and hospitality to the next level (Theme 4); Deliver service excellence and innovation (Strategy 1); Self-sustaining finances (Tactic 1)
Impact and Scope:	Niagara Parks might not be able to resume to critical or normal operations in the event of a business interruption or disaster. Niagara Parks is structured as a self-financed agency without taxpayer support. An interruption to business impacts Niagara Parks ability to provide excellent customer service, to support front line operations and to meet its financial and stewardship obligations.
Overall Risk Assessment:	Medium
Mitigation:	Niagara Parks has Business Interruption insurance. A formal Business Continuity Plan (BCP) for its Information Technology Services exists. Other departments have informal recovery procedures. At June 2019 meeting, Niagara Parks Board has directed the preparation of a formal entity wide BCP and resources will be allocated in the upcoming business plan and budget cycle. Niagara Parks will conduct business impact assessments that encompass significant functions within the Commission and use the results to develop the business continuity plan. Documentation of assets, regular testing of the feasibility of the BCP and staff training through table-top exercises will be part of the plan.



Risk Factor:	COVID-19 pandemic results in significant losses to revenue and impact to visitor experience
Description:	Global impact of COVID-19 on visitation patterns and revenues.
Relation to Strategic Plan:	Taking experiences, services and hospitality to the next level (Theme 4); Deliver service excellence and innovation (Strategy 1); Self-sustaining finances (Tactic 1)
Impact and Scope:	Niagara Parks would not be able to resume to critical or normal operations, in a self-sufficient business model in the event of a sustained negative impact to visitation over multiple years. Niagara Parks is structured as a self-financed agency without taxpayer support. The majority of Niagara Parks' revenues are variable and dependent on visitation while many of its costs, such as policing, parks and road maintenance are fixed in nature.
Overall Risk Assessment:	High
Mitigation:	Niagara Parks has significantly reduced its expenditures, including administrative and other staffing costs. Niagara Parks has applied for Provincial Grant funding in the amount of \$25 million and requested an increase to its Line of Credit to weather the impact over the next fiscal year.



8.0 Human Resources

Strategic Plan

Human Resources is a key element of Niagara Parks' 10-year strategic plan as identified by the strategic goal of "Growing the Talent". Niagara Parks is committed to attracting and retaining a highly professional, motivated, engaged and satisfied workforce within a culture of teamwork, mutual respect and trust. This is achieved by aligning the right people with the right skills in the right places to promote continuous improvement and excellence. The strategic initiatives to support the goal are:

1. Supporting excellence in recruitment and retention strategies
2. Supporting development of staff and acquisition of new skills
3. Promoting employee engagement and recognition

Workforce

For 2019-20, Niagara Parks' had a peak workforce complement of approximately 1,800 employees comprised of 330 full-time positions and the remaining positions seasonal, part-time and student. The full-time equivalent (FTE) count was approximately 934 positions.

The COVID-19 pandemic has affected Niagara Parks' staffing levels, reducing the forecasted count for fiscal 2020-21 to 439 FTE. Charts showing the impact on staff complement and wages are shown in Table 10.8 and Table 10.9 respectively.

Service Delivery and Modernization

In 2019, Niagara Parks continued to strengthen its Human Resources function and client service delivery, focusing on the continued modernization and efficiency of Human Resources programs and processes and customer service initiatives.

Niagara Parks completed its second full year with the ADP Payroll/Time and Attendance/Human Resources system. Niagara Parks continues to work on HR, Pension, Benefit and Payroll processes by utilizing ADP to streamline documentation and reporting.

Niagara Parks further procured and implemented a new Applicant Tracking System (ATS) in 2019. This new system allows for the elimination of paper-based headcount and recruitment approvals and business cases by providing approval routing within the system. Additionally, Niagara Parks has built in documentation onboarding to provide new hires with all required documentation prior to commencement of employment, which can be uploaded in the system for HR and Payroll follow-up. Niagara Parks' full-time and seasonal recruitment activities will be completed within the new system.



To support customer service and employee readiness for their seasonal assignments, Niagara Parks implemented a full day New Employee Orientation program providing new employees with a tour of attractions, facility manager introductions and a training presentation on the various offerings and customer services expectations.

Labour Relations

A priority of Niagara Parks is its focus on employee engagement and the strengthening of labour relations efforts.

Niagara Parks held employee events in 2019 to connect staff at all levels of the organization and to promote cross-functional teamwork. Among those were the annual Retirement and Recognition event, Take Our Kids to Work Day, United Way events and holiday events.

Niagara Parks continued to recognize employee achievement through its Employee Awards program which promotes the nomination of employees by fellow employees for awards in the following five categories: Customer Service, Innovative Business Solutions, Leadership and Empowerment, Team Spirit and Community Partnerships. In addition, Niagara Parks has a “Chair’s Award of Excellence” which is presented to an individual or group that exhibits exceptional performance in several of the individual award categories. Individual events were also held within each department throughout 2019 to recognize those employees who have reached milestones of 25, 30, 35 and 40 years of service with the Niagara Parks. Regarding staff recognition going forward, Niagara Parks will align any future initiatives to government direction within its Expenditure Management Strategy.

Niagara Parks has three unions and meets regularly to share information and discuss any issues. In 2019, Niagara Parks completed negotiations and ratified a new four-year Memorandum of Agreement with Workers United Council of Canada, which represents approximately 83 members who work as servers in our full-service restaurants. That agreement will expire on December 31, 2022. Negotiations are currently ongoing with the Niagara Parks Police Service (OPSEU) representing approximately 28 special constables and communicators.

Niagara Parks implemented several pieces of labour legislation in 2019 including: Bill 47 Making Ontario Open for Business Act 2018, Bill 66 An Act to restore Ontario’s competitiveness and the Restoring Trust, Transparency and Accountability Act, 2018 (Bill 57).

In conjunction with the 10-year strategic plan, Niagara Parks continued implementing a corporate change management program to support staff through the implementation of numerous projects. A vendor of record was procured through Prosci Canada who provided change sponsor training as well as change manager training. Thirty staff were also certified as change leaders to assist with



various change management initiatives into the future to support the strategic plan. The principles of the change management program are currently utilized in various Niagara Parks large and small projects.

Employee Learning and Development

Through the Learning Management System (LMS), staff across the organization took part in a significant amount of training through online modules and self-paced learning. There were registrations for a variety of programs and training modules for courses such as the New Employee Orientation, Niagara Parks Policy and Procedure Training, first aid/CPR/AED, equipment training, health and safety certification (Parts 1 and 2), WHMIS and traffic control. Niagara Parks also supported registrations for professional seminars and conferences.

As part of an ongoing program for management development through Brock University's Goodman School of Business, a renewed curriculum was delivered in the beginning of 2019 to 50 managers and supervisors covering topics such as finance, strategic planning, key performance indicators, project management, high-performing teams, emotional intelligence and leading change. In Q3 of 2019-20, 30 managers participated in the CEO Leadership Roundtable sessions to further develop their strategic leadership competencies.

New condensed training modules were added to the LMS in 2019 including HR Legislative Orientation Module, Health and Safety Orientation Module, AODA Training Module as well as a series of department specific Health and Safety procedural modules.

Talent Acquisition

While COVID-19 has impacted the near-term hiring needs for Niagara Parks, it is anticipated that in the coming three-to-five year period, there will be a number of retirements which will necessitate a certain level of talent recruitment. In addition, with continued plans for business and revenue growth post-COVID, Niagara Parks may require additional resources to meet organizational needs. In response to these challenges and anticipated needs, Niagara Parks will engage in targeted recruitment strategies and source local and regional community resources for potential labour pools such as:

1. Enhanced Niagara Parks hosted job fairs
2. Engaged in partnerships with Niagara College, Brock University and community-based centres including Fort Erie Native Friendship Centre and YMCA Niagara Falls to expand recruitment sources



3. Participate in networking activities in the Niagara Region including through Niagara Training & Employment Agency and the Ontario Disability Employment Network
4. Develop relationships with community groups to obtain resources and/or provide required training to fill Niagara Parks positions

As part of Niagara Parks' strategic plan, a renewed recruitment plan is being developed to recognize the diversity of the Niagara area and visitors to Niagara that embraces inclusion and ensures equal opportunity. These efforts will expand beyond Niagara with the goal of attracting others to employment opportunities within the region.

Niagara Parks maintains detailed organization charts and headcounts to identify all full-time and seasonal positions by department. This information is critical as Niagara Parks reviews its potential retirements and formal succession plans over the next several years.

Niagara Parks' Executive Team and Human Resources are working to develop and implement a formal succession planning process to identify and grow top organizational talent for key future vacancies. In some cases, the succession plan will include intentional external recruitment to ensure the organization continues to develop organizational capacity (see last page of this section for organizational chart).

Compensation Strategy

Niagara Parks' compensation strategy is to be a competitive employer that offers fair wages, salaries and benefits in relation to the comparative market. Niagara Parks' positions are benchmarked against the southern Ontario market outside of the Greater Toronto Area. In addition, Niagara Parks benchmarks its salary structure at the 50th percentile for its full-time positions.

Seasonal student rates of pay are set in relation to the provincial minimum wage with additional wage levels as required to recognize increased responsibility.

All union rates and associated job evaluation strategies are negotiated with the local bargaining agents. Niagara Parks' non-union, non-student rates are also established through a formal job evaluation system.

Niagara Parks offers a benefit package to its full-time employees that is comparable to other Ontario Public Service employees. Seasonal unionized staff receive a payment in lieu of benefits as negotiated between the parties.

Niagara Parks staff, excluding students, are also eligible to participate in one of the pension plans offered through the Ontario Pension Board and OPSEU Pension Trust.



8.1 Key Human Resources/Health and Safety Priorities and Actions

2020-21 Priorities and Actions

Learning and Development

- Update training modules in LMS to reflect branding and strategic plan initiatives; introduce new modules to grow employee knowledge and skills
- New Employee Orientation Program

Employee/Labour Relations

- Complete contract negotiations with OPSEU, Local 217-Park Police

Talent Acquisition

- Implementation of new Applicant Tracking System for the integrated recruitment of both full time and seasonal staff
- Network with community groups and schools to increase our labour pools and diversity in the recruitment process

Health and Safety

- Implement all required COVID-19 health and safety procedures, including training
- Updated the workplace inspection process to include inspections by management employees
- Conducted the health and safety management system audit using the ISO 45001 Standard using an internal group of employees
- Developed and assigned to management employees a health and safety training program for Safety Leaders on the Learning Management System
- Updated and communicated a Joint Health and Safety Committee Manual
- Revamped the hazard and risk assessment procedure

2020-23 Priorities and Actions

The following actions had been planned for 2020-23. Due to reduced funding and staffing levels, the implementation timeline will likely be delayed by one to two years.

Learning and Development

- Develop reciprocal programs between Niagara Parks and local educational institutions



- Develop a workforce plan with three- to five-year projections
- Formalize design of corporate succession planning model

Talent Acquisition

- Develop new apprenticeship and internship opportunities
- Develop and implement additional volunteer programs and opportunities
- Promote and support acquisition of new skills and retraining to meet the strategic plan's change management requirements

Employee/Labour Relations

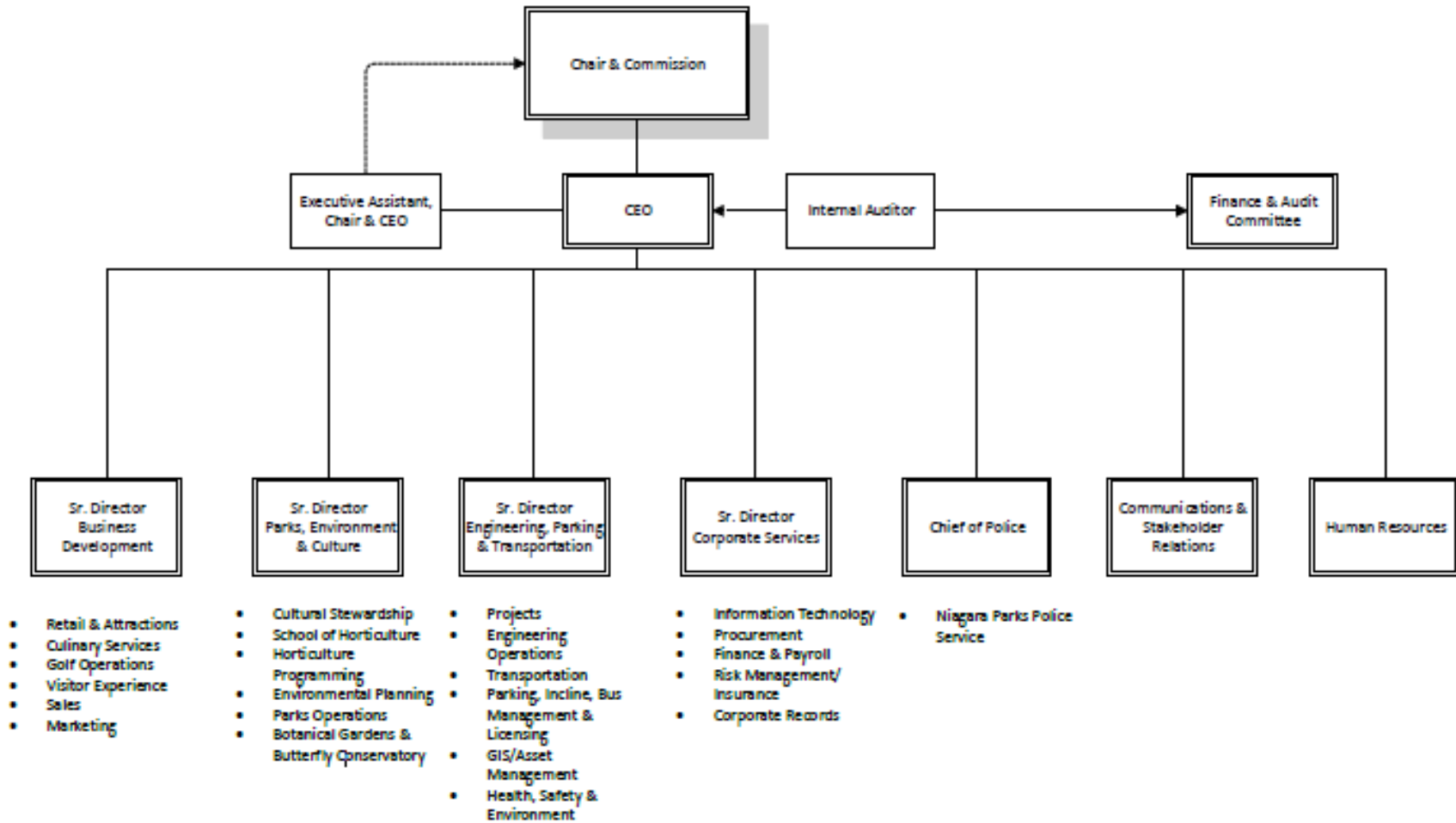
- Review and update employee recognition programs
- Enhance cross-functional teams to engage employee input into initiatives and plans

Compensation

- Conduct market surveying to ensure Niagara Parks' compensation practices are competitive
- Conduct review of job evaluation tools to ensure current relevance
- Develop new joint job evaluation process with OPSEU

Health and Safety

- Pursue ISO 45001 certification
- Complete hazard and risk assessments for all job positions at Niagara Parks
- Development of a workplace wellness program
- Update the safety communication program to allow for increased employee consultation
- Development of a continuous improvement process related to health and safety objectives





9.0 Performance Measures

Commensurate with the strategic plan and performance goals, Niagara Parks uses a composite model of tourism indicators to support evidence-based decisions and serve as reference points for business planning, including revenue growth, visitor impact, cost containment and service excellence.

The following are key performance measures that Niagara Parks uses in its operations to assess performance on the key priorities identified in its Strategic Plan.

Deliver Service Excellence & Innovation: Self-sustaining Finances

In its operating budget for the year ended March 31, 2020, Niagara Parks achieved a net surplus of \$13.063 million for the year, \$2.957 higher than budget.

The main source of the positive variance in the current fiscal year is a higher contribution from Revenue-Producing Operations (RPOs) and reduction in administrative expenses.

For the year ended March 31, 2020, Niagara Parks' margin from RPOs improved over the prior year ended March 31, 2018, by \$2.8 million, as detailed in Table 9.1 below. While revenues rose by approximately \$3 million, cost of goods sold increased by \$1.1 million and operating costs were reduced by approximately \$1 million.

	Retail	Attractions	Parking & WEGO	Incline Railway	Culinary	Golf	Total
April 1, 2019 - March 31, 2020	\$ 7,754	\$ 20,185	\$ 7,863	\$ 1,281	\$ 2,873	\$ (174)	\$ 39,782
April 1, 2018 - March 31, 2019	\$ 8,430	\$ 16,464	\$ 7,533	\$ 1,335	\$ 3,335	\$ (143)	\$ 36,954
\$ increase in contribution	\$ (676)	\$ 3,721	\$ 330	\$ (54)	\$ (462)	\$ (31)	\$ 2,828

For the 2020-21 Revised Budget, a negative contribution from RPOs is expected due to closure of commercial operations for most of the first quarter and a phased provincial opening in the second, combined with closure of international borders. Commercial operations have many costs that are semi-fixed in nature, due to the scale of normal operations and a business model designed for year-round, seven day per week operations, particularly in Q1 and Q2. Therefore, it is not possible to reduce costs in the short term below a certain level. Niagara Parks is forecasting a contribution of \$4.3 million from RPOs based on attendance and revenues in the first five months of 2020-21, a reduction of approximately \$35 million.



Self Sustaining Finances: Asset Condition – Facility Condition Index (FCI)

Niagara Parks maintains information about its asset condition and replacement/repair requirements in a condition assessment database, referred to as the Asset Management Information System (AMIS). Information in the database is updated annually to reflect investments in asset replacement and reconditioning, aging of assets and current unit costs to replace. FCI is an industry-standard index that objectively measures the current condition of a facility which allows comparison both within and among institutions. To determine FCI for any given set of assets, the total cost of remedying deferred maintenance requirements is divided by the current replacement value. Generally, the higher the FCI, the poorer the condition of the facility.

The current FCI for Niagara Parks assets (excluding decommissioned generating stations) in the AMIS database at December 2019 is .48. This represents a current remediation cost of \$197 million divided by current replacement value of \$412 million. Niagara Parks has been steadily increasing its investments in asset remediation over the past three years in addition to strategic investments in revenue generating assets and strategic priorities. Niagara Parks is targeting an investment rate in life cycle maintenance over the 10-year plan that exceeds the annual depreciation rate, which will reduce deferred maintenance on assets and thereby improve Niagara Parks' FCI steadily over the long-term. In 2020-21, Niagara Parks was targeting investment in life cycle replacement of \$11.199 million and strategic capital investments of \$29 million, and the depreciation rate was estimated at \$11.3 million. Due to the impact on revenues, capital investment will be significantly reduced over the next three years, and therefore it can be expected that the FCI will increase and the condition of assets deteriorate.

Deliver Service Excellence and Innovation: People-Related Performance Measures

A quarterly report of dashboard indicators is provided to the Board through the Governance, Ethics and Human Resources Committee. These measures include performance appraisal return rates (evaluations completed), health & safety measures, sick leave attendance and registrations for employee learning and development.

Develop Great Visitor Experiences: Guest Survey

Guest surveys are conducted annually during May to October to gather guest feedback and to assess satisfaction with their experiences in Niagara Parks. This project was paused in 2020 due to COVID-19 cost pressures. In last year's survey, questions to assess Niagara Parks brand awareness were posed in the survey, and responses indicate that 45 per cent of respondents were familiar with Niagara Parks, up from 41 per cent in the prior year, while 84 per cent of respondents



were very likely to recommend Niagara Parks to friends and family (down from 90.5 per cent in 2018). Table 9.2 below summarizes key data from the 2019 Guest Survey:

Table 9.2 Customer Survey						
	2019	2018	2017	2016	2015	2014
Average party size	4.0	3.0	2.9	4.1	3.6	3.6
% of respondents from the US	54.0%	39.2%	57.0%	62.6%	48.8%	36.7%
Respondents who stayed overnight in the Niagara Region	62.0%	56.4%	75.9%	72.2%	73.7%	64.5%

Develop Great Visitor Experiences: Guest Services Centre

For the second year of operations, Niagara Parks achieved the following performance measurement targets for the new Guest Services Centre:

- Incoming guest requests were resolved at first contact 97 per cent of the time (Target: 90 per cent)
- Guest inquiries or issues were resolved with a median full resolve time of 42 minutes (Target: 45 minutes)
- Guest Services Centre Representatives maintained a customer satisfaction score of 97 per cent (Target: 90 per cent)
- Guests calling by phone experienced an average wait time of 7.2 seconds (Target: 20 seconds)

Develop Great Visitor Experiences: Attendance

Attendance statistics are an important key performance indicator for Niagara Parks. For the 2020-21 budget, Niagara Parks had initially projected a similar level of attendance as achieved in the 2019-20 season. In addition to attraction attendance, Niagara Parks also tracks customer statistics in culinary (number of covers, average transaction value) and retail (number of transactions/average transaction value). With the impact of COVID-19, Niagara Parks is now projecting attendance levels at approximately 20% of the previous year for Q2 through Q4 (Niagara Parks was closed for the majority of Q1).



Table 9.3 below provides a summary of Attendance History.

	Change from Prior Year	April 2019 to Mar-2020	April 2018 to Mar-2019	April 2017 to Mar-2018	April 2016 to Mar-2017	April 2015 to Mar-2016	Nov 2013 to Oct-2014
NPC Operated Attractions	2%	1,999,920	1,968,507	2,018,077	1,888,105	1,842,374	1,580,337
Golf Rounds	4%	84,239	80,960	72,874	77,209	73,602	68,216
Boat Tour	-5%	2,196,992	2,322,258	2,358,982	2,250,447	1,841,852	1,528,334
Zip Line	14%	106,500	93,768	78,084	48,410	-	-
Aerial Adventure Course	0%	23,316	23,348	20,759	-	-	-
Historic Sites	6%	29,916	28,153	36,236	26,960	24,913	27,023
Falls Incline Railway	7%	1,187,336	1,110,440	1,056,910	990,363	971,941	643,270
WEGO Transportation Service - Green Line	9%	1,332,557	1,224,568	1,264,381	1,159,901	852,067	923,964

Develop Great Visitor Experiences: Information Technology Modernization

The key information technology upgrade that will take place in 2020-21 will be the implementation of a new Enterprise Resource Planning system, Unit 4 Business World, to replace Niagara Parks' aging financial accounting software, Epicor.

Promote Niagara Parks' Environmental Stewardship Role

To contribute to the promotion and enhancement of Niagara Parks' environmental stewardship role, the following initiatives were undertaken over the past year:

- Urban Forestry Management Plan – Established a target that 75 per cent of the Niagara River shoreline will be covered with native vegetation by 2028. The upper Niagara River environmental inventory was completed. Upper Niagara River shoreline currently has vegetation consisting of both native and invasive species with approximately 30 per cent native vegetation.
- Invasive species management – To offset the impacts of Emerald Ash Borer, larger caliper trees will continue to be planted along the boulevards. Gypsy moth control program being applied at Paradise Grove and Upper Whirlpool Woods with good success. New invasive species Hemlock Woolly Adelgid is an insect that infects hemlock trees. A recent outbreak in the Niagara Glen is now under management with burning and removal of infected trees. Ongoing monitoring is being undertaken with engagement Canadian Food Inspection Agency.
- Investments were made in a new stewardship team to address invasive species removal along the entire river corridor. The goal is to remove species along 10 km of shoreline. Existing viewpoints along upper river were managed to re-establish views.
- Niagara River Coastal Wetland Project – To date four sites have been completed: Ussher's Creek, Bakers Creek, Gonder's Flats and Boyers Creek and additional partnership work with

Niagara Peninsula Conservation Authority and Environment Canada. Over 1,000 metres of coastal wetlands have been installed, utilizing over 200 ash trees that have succumbed to the Emerald Ash Borer, 350 recycled Christmas trees and 460 tonnes of boulders. Native aquatic vegetation was established in the first three sites. Monitoring and assessments of the project sites will continue.

- Chippawa Grassland Bird Habitat Project – Over 50 hectares (120 acres) of native grassland habitat were restored at the Chippawa Battlefield site. Ecological monitoring of birds and vegetation are currently underway. Funding support from Environment and Climate Change Canada, MNR and General Electric Canada.
- Pollinator garden program continued to expand. An additional garden was added to the entrance of Legends on the Niagara golf course bringing the total of pollinator gardens to 13. The garden was funded in part by Pollinator Partnership Canada.
- Wildlife management initiatives include installing nesting structures for species at risk (Barn Swallows) at various Niagara Parks sites as well as nesting structures at Chippawa Battlefield and Grassland site.
- Educational Institutions – Since the execution of the Memorandum of Understanding between Niagara Parks and Brock University's Environmental Sustainability Research Centre, significant progress has been made. An environmental stewardship action plan has been completed, as well as research on the Niagara Parks staff, public and stakeholders' perceptions of the state of the Niagara Parks environment in relation to ecological measures. Several research projects are ongoing including analysis of monitoring approaches, environmental stewardship networks and public precepts/value of Niagara Parks as environmental stewards.
- Niagara Parks continues to also work with Niagara College. Students completed inventory of invasive plants along lower river shoreline areas. Niagara College students are currently completing a forest management plan and a hydrologic analysis of the Queenston Niagara Escarpment woodlot.
- Partnerships – Niagara Parks, in collaboration with Forests Ontario, will continue its proactive tree planting program.
- New investments into the waste collection process are complete, including:
 - A new dual stream waste collection truck. This unit will be used to service a diversion stream for recyclables and will be instrumental to the success of reaching diversion targets without adding a second route for recycling. This truck will service both central park as well as the boulevards reducing the need for each area to do their own primary waste collection.



- New dual stream waste containers are also being deployed across Niagara Parks.

Promote Niagara Parks' Cultural Stewardship Role

Through its cultural stewardship initiatives, Niagara Parks strives to deliver on its core mandate, share Niagara Parks' story and offer a sense and pride of place for guests visiting from around the world.

1. Niagara Parks will continue to leverage partnerships to offer diverse programming activities in 2020-21 including:
 - Indigenous programming and educational initiatives during Indigenous Month and throughout the year in partnership with Landscape of Nations 360°
2. Packaging programming and events into various lifestyle series themes around active, healthy living, horticulture, culinary, history and literary including:
 - Active Healthy Living
 - Namaste Niagara
 - DIY Horticulture
 - Workshops at Laura Secord, Mackenzie Printery and the Floral Showhouse
 - Culinary
 - Chef's Tables (limited capacity)
 - Harvest Moon Dinner (limited capacity)
 - Heritage – Friday Night Frights Ghost Tours
 - Old Fort Erie Speakers Series (delivered virtually)
 - Literary
 - Coast to Coast Literary Series at Laura Secord Homestead (delivered virtually)



10.0 Financial Budget and Staffing

Niagara Parks is a board-governed operational enterprise provincial agency that generates revenues from a variety of operations. The largest source of revenue earned is from Niagara Parks' commercial activities. For the year ended March 31, 2020, this source generated approximately \$116.2 million or 91 per cent of total revenues. The remaining \$10.1 million or 9 per cent is generated from water/land rentals, fees, investment income and sundries.

This revenue is intended to allow Niagara Parks to operate in a self-sufficient manner while covering the expenditures needed to support the work in the maintenance, parks and administrative departments, operate its own police force and permit Niagara Parks to reinvest in its infrastructure.

10.1 Summary of 2019-20 Results, 2020-21 Approved Budget and 2021-23 Forecasted Results

In its operating budget for the year ended March 31, 2020, Niagara Parks achieved a net surplus of \$13.063 million for the year, a positive variance of approximately \$3 million from budget. The main source of the variance for the fiscal year was a higher than expected contribution from Revenue Producing Operations (RPOs) and a reduction in administrative expenses.

The 2020-21 operating budget was prepared on the basis that the economic outlook impacting Ontario tourism in the upcoming year would be comparable to the 2019-20 year. Niagara Parks' revenues are sensitive to economic risk factors, including changes in exchange rates, interest rates and oil prices all of which have an impact on discretionary household income available for tourism activities as well as any changes in U.S. visitation from projected levels.

On March 14, 2020, as a result of the COVID-19 pandemic, Niagara Parks closed all its public-facing and revenue-generating facilities. The Board and Niagara Parks staff undertook immediate actions to reduce expenditures and conserve cash, including the immediate layoff of all seasonal and student labour, and subsequent lay-off of all but core full-time staff.

Niagara Parks has adjusted both operating and capital expenditures in response to the closure.

On June 11, 2020, a Board resolution approved:

- a revised Operating and Capital budget for 2020-21;
- a request to the Province to approve an increase in its borrowing limit from \$15 million to \$35 million, and,



- a request to the Province for a one-time operating grant of \$25 million, to assist Niagara Parks with its park maintenance, security and revenue shortfalls arising out of closure due to COVID-19.

The original operating budget, as well as the revised budget and revised three-year forecast, are shown in Table 10.1 below.

(In thousands of dollars)	Actual 2019-20	Original Budget 2020-21	Revised Budget 2020-21	Revised Budget 2021-22	Revised Budget 2022-23	Revised Budget 2023-24
Revenue Producing Operations	99,064	103,046	36,612	72,132	90,165	94,674
New CNP Attraction				3,608	7,221	9,143
Land Rent - Ontario Power Generation	7,437	7,483	7,569	7,720	7,875	8,032
Commissions Rentals & Fees	144	99	51	61	77	80
Boat Tour Revenue	15,769	16,004	7,684	11,203	14,004	14,704
Zipline Revenue	2,294	2,150	1,143	1,505	1,881	1,975
Sponsorship	512	435	363	305	381	400
Premium on U.S. Funds - net	652	692	-	-	-	-
Interest on Bank Deposits	585	605	5	-	-	-
Sundry	849	781	545	547	683	718
Total Revenue	127,306	131,295	53,972	97,081	122,286	129,725
Revenue Producing Operations						
Cost of Goods Sold	16,624	16,508	5,585	11,556	14,445	15,167
Operating Expenses	41,094	44,258	26,506	30,981	38,726	40,662
Operating Expenses - CNP Attraction				2,234	3,256	3,778
Strategic Plan Key Priorities	298	550	550	550	550	550
Parks, Environment & Culture	13,805	15,234	10,511	12,613	15,767	16,555
Engineering, Public Washrooms & Administration	8,122	8,056	7,195	7,555	7,932	8,329
Niagara Parks Police Service	3,904	4,234	3,695	4,065	4,471	4,694
Administration	11,536	11,712	10,497	11,022	11,022	11,573
Sales, Marketing & Visitor Experience	7,209	7,817	4,733	5,472	6,019	6,320
Total Expenses	102,592	108,369	69,272	86,046	102,187	107,628
Annual Surplus (Deficit) before Interest & Depreciation	24,714	22,926	\$ (15,300)	\$ 11,034	\$ 20,099	\$ 22,097
Interest Expense	1,104	1,072	1,072	980	750	450
Depreciation & Deferred Stimulus Funding	9,914	12,199	11,183	13,260	14,705	16,000
Net Income/(Loss) from Operations	\$13,696	\$9,655	(\$27,555)	(\$3,206)	\$4,644	\$5,647
Power Plant Obligation Adjustment	(\$633)	(\$575)	(\$575)	\$0	\$0	\$0
Annual Surplus (Deficit)	\$13,063	\$9,080	(\$28,130)	(\$3,206)	\$4,644	\$5,647

April 1, 2019 to March 31, 2020 Operating Results

The most significant impact to RPOs in the 2019-20 fiscal year was the strong global economic climate, particularly in Ontario and the U.S. The value of U.S. currency in comparison to the Canadian dollar and favourable weather were also significant contributors to the positive financial results.

In the last full fiscal, 2019-2020, attendance at Niagara Parks' six directly operated attractions was up by approximately 1.6 per cent and attendance at Niagara Parks' four heritage sites was up approximately 6 per cent. Golf rounds also improved, up 4 per cent from the prior year. Phase 2 reconstruction of Niagara Parks' Table Rock Complex from November 2019 to April 2020 slightly impacted revenues from their normal levels.



A significant contribution to Niagara Parks' revenues is derived from lease of the Boat Tour Service, which commenced with the current operator, Hornblower Niagara Cruises, in January 2013. These lease revenues include a base rent plus a guaranteed minimum variable percentage for the first five years ending December 31, 2018. In fiscal 2019-20, which was the first year without a minimum guaranteed rent, revenues for the Boat Tour were impacted by a weather-related delay in opening for the season in mid-May due to extended ice conditions. At \$15.769 million, Niagara Parks came very close to reaching the amount entitled to the last year of full guaranteed rent, which was \$16 million. 2019-20 was the first year of opening of the funicular as an alternate entrance to the elevator to arrive at the lower Grand View deck to the boat tour. The change in passenger traffic flow using the funicular impacted Niagara Parks' revenues at its retail outlet and Niagara Parks modified its Grand View retail operations to adjust in the change in traffic flow. For 2019-20, Niagara Parks projects attendance at the boat tour at 2.225 million passengers, down approximately 4% from the prior year.

The actual results and budgets includes revenues from Niagara Parks' lease with Niagara Adventure Excursions Inc. (NAE) for the zipline and adventure course attractions. These revenues were \$2.294 million, up from \$2.061 million in the prior year.

April 1, 2020 – March 31, 2021 Operating Budget, including June 11, 2020 Amendment

The board approved its original 2020-21 budget and business plan on December 12, 2019, with an anticipated revenue of \$131 million and a surplus, before debt charges and depreciation (to be applied towards capital projects and debt charges), of \$22.9 million. The business plan was prepared with reference to Niagara Parks' recent strong financial performance and priorities identified in its 10-year strategic plan and also included Niagara Parks' approved 10-year capital plan.

On March 14, 2020, as a result of the COVID-19 pandemic, Niagara Parks closed all its public-facing and revenue-generating facilities. The Board and Niagara Parks staff undertook immediate actions to reduce expenditures and conserve cash, including the immediate layoff of all seasonal and student labour, and subsequent lay-off of all but core full-time staff.

Niagara Parks has adjusted both operating and capital expenditures in response to the closure. However, certain fixed expenses such as insurance, utilities and safety-related maintenance cannot be avoided and other expenses such as police, park and road maintenance cannot be reduced beyond minimum service levels. Further, certain contractual commitments through competitive procurement had been made, prior to the emergency orders, and must be honoured.



Niagara entered Stage 2 of the provincial re-opening framework on June 26, 2020. The June 11 revised budget shown in Table 1 was prepared on the basis that Niagara Parks would achieve approximately 50 per cent of its prior year revenues once Stage 2 was reached.

While visitation to Niagara Parks has increased, the spending pattern of domestic visitors has not resulted in revenues at the budgeted level, with the exception of golf operations.

As Niagara Parks opened in phases, visitation and revenue continued to lag behind the revised budget. The revised budget approved on June 11, adjusted for the pandemic impact on the tourism economy, for July and August 2020 was approximately \$24.6 million. Revenues for July and August are projected at \$13.4 million, roughly 55 per cent of the revised budget and 27 per cent of the revenue earned in the same two months in 2019.

It is evident from the first two months following Stage 2 re-opening that the impact of COVID-19 is far more devastating to Niagara Parks' operations and financial position than anticipated. The loss of foreign visitation, which has traditionally made up 70 per cent of Niagara Parks' commercial revenues, has not even come close to being offset by domestic spending from Ontario visitors.

On the positive side, since re-opening in late May 2020, golf operations have consistently achieved revenues similar to the same day in the prior year. Parking has experienced approximately 30-50 per cent of prior year revenues. However, for retail, attractions, culinary, incline and WEGO transportation, revenues have been approximately 5-40 per cent of revenues for the same day of the prior year.

Saturdays have proven to be the best day of the week, from a revenue perspective. Weekends have represented approximately 50 per cent of weekly revenues since re-opening; whereas, in July and August 2019, weekends represented about 30 per cent of the weekly revenues. Niagara Parks has introduced two mid-week promotions this summer – Toonie Tuesdays and Thankful Thursdays – which have increased sales on these days, in the later weeks of the summer, although the incremental revenues are not material to overall operations.

Historically, most of Niagara Parks' revenues are received in the first six months of its fiscal year. Having completed the first five months of the current fiscal year, an updated forecast for fiscal 2020-21 is provided in Table 10.1a.



(In thousands of dollars)	Actual 2019-20	Revised Budget 2020-21	Forecast Actual 2020-21	Variance to Budget	Variance to Prior Year
Revenue Producing Operations	99,064	36,612	15,886	(20,726)	(83,178)
Land Rent – Ontario Power Generation	7,437	7,569	7,569	-	132
Commissions Rentals & Fees	144	51	51	-	(93)
Boat Tour Revenue	15,769	7,684	6,534	(1,150)	(9,235)
Zipline Revenue	2,294	1,143	500	(643)	(1,794)
Sponsorship	512	363	192	(171)	(320)
Premium on U.S. Funds – net	652	-	(50)	(50)	(702)
Interest on Bank Deposits	585	5	8	3	(577)
Sundry	849	545	545	-	(304)
Total Revenue	127,306	53,972	31,235	(22,737)	(96,071)
Cost of Goods Sold	16,624	5,585	1,582	(4,003)	(15,042)
People Related Expenses	57,135	41,317	31,997	(9,320)	(25,138)
Service & Product Related Expenses	5,482	3,425	1,012	(2,413)	(4,470)
Equipment Related Expenses	5,712	5,486	4,705	(781)	(1,007)
Materials & Direct Supplies	2,969	2,094	1,431	(663)	(1,538)
Advertising & Promotions	3,616	1,938	789	(1,149)	(2,827)
Facility Related	7,210	5,487	4,906	(581)	(2,304)
Administrative Related	3,844	3,940	2,361	(1,579)	(1,483)
Total Expenses	102,592	69,272	48,783	(20,489)	(53,809)
Annual Surplus (Deficit) before Interest & Depreciation	24,714	\$ (15,300)	\$ (17,548)	\$ (2,248)	\$ (42,262)
Interest Expense	1,104	1,072	1,256	184	152
Depreciation & Deferred Stimulus Funding	9,914	11,183	11,183	-	1,269
Net Income/(Loss) from Operations	\$13,696	(\$27,555)	(\$29,987)	(\$2,432)	(\$43,683)
Power Plant Obligation Adjustment	(\$633)	(\$575)	(\$575)	-	58
Annual Surplus (Deficit)	\$13,063	(\$28,130)	(\$30,562)	(\$2,432)	(\$43,625)

To reduce the forecasted net loss, the above forecast anticipates the closure of many revenue-generating facilities with lower attendance following the Labour Day weekend, with the remaining facilities either closing after Thanksgiving or operating on reduced hours, rather than the seven days per week service levels previously provided pre-pandemic. Staffing levels have been reduced to approximately 50 per cent of the prior year.

10.2 2020-21 Capital Works Plan

In its original fiscal 2020-21 budget, Niagara Parks included \$40.215 million in capital works, including \$20.215 million for asset replacement and strategic capital projects from funds to be generated through Niagara Parks' commercial operations. For the redevelopment of the decommissioned CNPGS, Niagara Parks requested, and has been approved for, a \$25 million loan through the Ontario Financing Authority (OFA), advanced over the next two fiscal years, with a 10 year payback from earnings from the new CNP attraction operation, and the ability to repay the loan early, without penalty. The level of capital spending proposed was to address the capital deficiencies backlog identified in Niagara Parks' asset data condition database as well as support implementation of Niagara Parks' strategic plan.



Due to drastically reduced revenues from operations, the capital plan for projects to be completed from April 1, 2020 to March 31, 2021 has since been amended to \$4 million for critical equipment and facility maintenance items, \$5.5 million to complete the redevelopment of Table Rock, which was already in progress, and \$15 million for the first phase of the CNP attraction. The capital plan is summarized in Table 10.2 below:

<i>(thousands)</i>	Operational Efficiency	Proactive Replacement	Strategic Investment	TOTAL
Fleet & Heavy Equipment	\$ 390			\$ 390
Equipment	\$ 1,000			\$ 1,000
Facility Upgrades	\$ 2,000		\$ 5,500	\$ 7,500
Information Technology	\$ 245			\$ 245
Roads, Bridges, Paths Sidewalks	\$ 215			\$ 215
Park Development	\$ 150			\$ 150
Canadian Niagara Power Station Attraction			\$ 15,000	\$ 15,000
Total	\$ 4,000	\$ -	\$ 20,500	\$ 24,500

In addition to funding available from Niagara Parks' operations, the MHSTCI has periodically provided Niagara Parks with funding toward critical projects for the fiscal periods ended March 31 as indicated below in Table 10.3. For the 2020-21 fiscal year, no capital grant funding has been budgeted, although Niagara Parks has requested a \$25 million grant for operating and capital needs.

2015-2016	VFA projects	\$1,912
2016-2017	VFA projects	\$3,450
2017-2018	Bike Infrastructure	\$207
2018-2019		n/a
2019-2020		n/a
2020-2021		n/a

Debt Financing

Niagara Parks' outstanding long-term debt as at March 31, 2020 is \$20.7 million, with annual principal and interest charges of \$3.211 million, until the debt is retired in April 2027. This financing relates to the previous redevelopment of Table Rock Centre completed in 2007. The 2019-2021 redevelopment of Table Rock Centre is being completed with funding generated from current operations. Niagara Parks requested and was approved for borrowing of \$25 million from OFA to stabilize the decommissioned CNPGS and to build a new attraction within the Generating Station



including an immersive multimedia show. The construction is taking place during 2020-21, with the attraction scheduled to open in July 2021, in time for the Canada Summer Games. The 2021-22 forecast includes additional attraction-related revenues and expenses, netting approximately \$1.7 million from the first partial year of operations. The loan payments, estimated between \$2.8 million and \$3.0 million, are scheduled to start in the following year for 10 years, financed from the new attraction, and include a request for optional early repayment.

Foundation or Donations

Niagara Parks will continue to explore the use of donations and fundraising to assist with relevant and appropriate capital projects as determined by the Board. Niagara Parks is also re-starting the dormant Niagara Parks Foundation.

Other External Revenues

Engineering maintains a listing of shovel-ready projects identified in the Asset Management Information System (AMIS) reports to take advantage of grant funds that become available.

10.3 Asset Management Plan

Table 10.4 below shows the historical cost and net book value of Niagara Parks’ depreciable assets as provided by Niagara Parks’ most recent audited financial statements.

(thousands)	Buildings & Structures	Equipment	Vehicles	Total
Historical Cost	\$279,070	\$28,657	\$7,879	\$315,606
Useful Life	7 – 40 years	3-10 years	10-12 years	
Annual Amortization Charge	\$8,806	\$2,187	\$356	\$11,349
Net Book Value	\$138,529	\$7,596	\$4,571	\$150,696
Net Book Value as a Percentage of cost	50%	27%	58%	

The annual amortization charge of \$11.349 million represents the amount by which tangible capital assets depreciated during 2019-20. This \$11.349 million amount is based on historical costs and does not include funding for inflation, for assets that are fully depreciated from an accounting perspective but are still in use or funding for service enhancement.



Niagara Parks has identified the need for a detailed asset management plan and work continues on the components of this plan which are:

- State of infrastructure (condition assessment)
- Levels of service (various planning and engineering studies, space planning, master plans, strategic plan – further study required in 2020-22 to determine 10-year needs analysis)
- Replacement strategy (10-year asset replacement plan informed by studies)
- Financing strategy (10-year funding strategy, including funding from operations, debt financing, grants, donations, public private partnerships and other external sources)

This section of the business plan contains the preliminary elements for a detailed asset management plan. The plan's components will be updated as further studies are undertaken to refine them.

State of Infrastructure – Condition Assessment

In conjunction with the ministry and VFA, Inc., a contracted asset management consulting firm and software provider, engineering staff have been working on a condition assessment of Niagara Parks tangible capital assets, referred to as the AMIS Project. Similar AMIS projects are being conducted in other provincial agencies and ministries. The AMIS project is providing more detailed information about capital deficiencies and associated funding requirements for incorporation into a long-term capital plan.

The AMIS project has provided a current cost estimate of deficiencies of \$225.346 million, including deficiencies in specific structural items such as electrical systems, roofing, windows, etc. This amount includes an amount for similar deficiencies in power plant buildings quantified at \$28.037 million. Niagara Parks has received provincial funding of approximately \$1.8 million to assist in the stabilization process and condition assessment studies of the power plants. The value estimates provided in AMIS are updated each year based on updated inspections, capital work undertaken and additional depreciation and an inflation factor for requirements that have not been undertaken. The status of deficiencies (capital requirements) based on the AMIS reports as at November 2019 and inspected by VFA are identified in Table 10.5 below.



<i>(millions)</i>	NPC Operations	Power Plants	Total
Currently Critical	\$ 3,707	\$ 6,193	\$ 9,900
Asset Integrity - Imminent Failure	9,706	2,433	12,139
Asset Integrity - Proactive Replacement	182,962	19,223	202,185
Code Compliance and Legislative	659	67	726
Discretionary	275	121	396
Total Capital Deficiency, Nov-2019	\$ 197,309	\$ 28,037	\$ 225,346
Total Capital Deficiency, Nov-2018	\$ 174,791	\$ 26,134	\$ 200,925

Table 10.6 contains a more detailed breakdown of the capital requirements by type of asset totaling \$197.309 million identified for Niagara Parks operations, excluding the requirements for the power plant assets.

System Group and Priority	Currently Critical	Code Compliance & Legislative	Asset Integrity - Imminent Breakdown	Asset Integrity - Proactive Replacement	Discretionary	Total Nov 2019	Total Nov 2018
Electrical System	366	121	18	30,431		30,936	28,719
Equipment				47		47	46
Equipment & Furnishings			32	2,021		2,053	1,902
Exterior Enclosure	976	12	442	12,343	106	13,879	13,459
Fire Protection				750		750	739
HVAC System	8		3	28,994		29,005	28,482
Interior Construction and Conveyance	103	254		19,774	21	20,152	19,801
Plumbing System				4,702	60	4,762	4,568
Site	2,027		9,204	79,079		90,310	72,349
Special Construction				3,840		3,840	3,270
Structure	141		2	932		1,075	957
Other	86	272	5	49	88	500	499
Total - November 2019	3,707	659	9,706	182,962	275	197,309	174,791
Total November 2018 Comparative	3,564	654	9,515	160,785	273	174,791	

Asset Replacement Strategy

Table 10.7 summarizes the original long-term capital plan forecasted for 2019-29 for projects to be funded from Niagara Parks operations and debt financing from OFA, with the amendment to the 2020-21 capital as noted in Table 10.2 above. As a result of the economic impact of the COVID-19 pandemic and border closures globally, revenues are not expected to return to the pre-pandemic level for several years. The long-term capital plan for subsequent years will be revised in the upcoming year.



	2019-20 Budget	2019-20 Actual	2020-21 Original	2020-21 Revised	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30
Earnings before interest & Depreciation	22,232	24,714	22,926	(17,548)	11,034	20,099	22,097	32,803	33,546	34,305	35,084	35,878	36,693
(Increase) Decrease in Working Capital	6,552	3,063	500	30,259	(6,823)	(15,888)	(13,641)	(3,175)	(4,932)	(1,697)	(1,709)	(7,227)	(3,733)
OFA debt proceeds for Power Plant Renewal			15,000	15,000	5,000	5,000							
Reserve for loan repayment fund													
Repayment of Power Plant OFA							(2,845)	(3,009)	(3,009)	(3,009)	(3,009)	(3,009)	(3,009)
Principal & Interest on Debt Charges*	(3,211)	(3,211)	(3,211)	(3,211)	(3,211)	(3,211)	(3,211)	(3,211)	(3,211)	(3,211)	(2,922)		
Capital Funding Forecast	25,573	24,566	35,215	24,500	6,000	6,000	2,400	23,408	22,394	26,388	27,443	25,642	29,951
Capital Expenditure Forecast													
Equipment	1,607	1,453	1,802	1,000	500	500	1,200	1,522	1,558	1,589	1,631	1,669	1,707
Facilities	5,048	4,952	3,783	2,000	500	500	1,200	4,855	4,386	4,559	4,650	4,665	4,758
Fleet & Heavy Equipment	1,723	1,665	1,624	390				-	-	1,829	1,866	1,903	1,941
Information Technology	1,808	1,835	1,109	245				-	-	1,249	1,274	1,299	1,325
Park Development	200	229	175	150				-	-	225	230	234	239
Roads, Bridges, Paths Sidewalks	2,898	2,650	2,706	215				3,331	5,000	5,237	5,493	3,272	5,381
WEGO Bus Replacement								1,100	1,100	1,100	1,100	1,100	1,100
Subtotal Life Cycle Asset Replacement	13,284	12,784	11,199	4,000	1,000	1,000	2,400	10,808	12,044	15,788	16,243	14,142	16,451
Strategic Investments													
Canadian Niagara Power Station Attraction	309	808	15,000	15,000	5,000	5,000		1,200					
Journey Behind the Falls Tunnel Upgrade	150	159	1,000										
Subtotal Falls Power Plant & Tunnel Experience	459	967	16,000	15,000	5,000	5,000		1,200					
Table Rock Redevelopment	10,000	9,000	5,500	5,500				3,000					
Aero Car Upgrades													
Other attraction renewal								700	1,000	7,500	1,000		
Subtotal Attraction Renewal								700	1,000	7,500	1,000		
Grand View Renewal	200	231						1,200					
Queen Victoria Park Master Plan	1,060	981	1,046					2,450	5,850	1,600	1,700	10,000	2,000
QVP Facility renewal								1,350			4,000	10,000	10,000
Subtotal QVP improvements	1,060	981	1,046					3,800	5,850	1,600	5,700	10,000	12,000
Floral Showhouse and Botanical Gardens	220	75	400					2,000	1,000	1,000	4,000	1,000	1,000
Brand Strategy and Wayfinding	150	328	250										
Niagara Parks Marina/Boat Launches/Breakwall	50	50	350										
Waste & Recycling	150	150	270					200					
Oak Hall Apartments			200										
Oakes Garden Theatre									2,000				
Trails								500	500	500	500	500	500
Subtotal other strategic	350	528	1,070					700	2,500	500	500	500	500
Subtotal Strategic Investments	12,289	11,782	24,016	20,500	5,000	5,000	-	12,600	10,350	10,600	11,200	11,500	13,500
Capital Expenditure Forecast	25,573	24,566	35,215	24,500	6,000	6,000	2,400	23,408	22,394	26,388	27,443	25,642	29,951
Capital - Strategic Investment Ratio (Excluding Debt Financed for CNP)	48%	48%	45%	58%				54%	46%	40%	41%	45%	45%

* Loans mature: OFA - April 30, 2027 and TD Bank - Oct. 31, 2027

The revised 2020-21 asset replacement plan incorporates \$4 million in life cycle asset replacement as well as \$20.5 million in strategic investments in capital, including \$15 million for the adaptive re-use of CNPGS and the completion of the Table Rock Phase 2 renovation to assist with the implementation of Niagara Parks' strategic plan priorities.

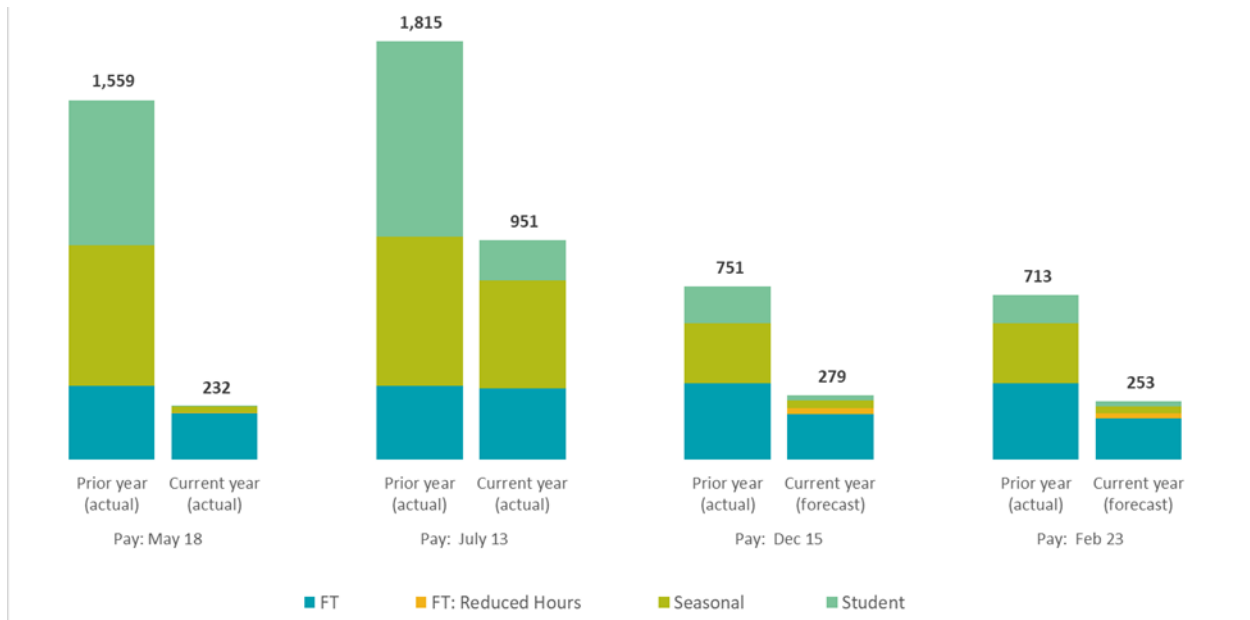
In 2018-19, Niagara Parks approved a Cash Management Policy and a Capital Works & Equipment Maintenance & Renewal Program Policy, to assist in development of capital plans that ensure maximum funds are made available for investment in deferred maintenance and strategic priorities while ensuring long-term financial sustainability and flexibility for Niagara Parks operations. Most of Niagara Parks' revenues are earned in the first two quarters of the fiscal year and capital works are generally completed in the last two quarters of the fiscal year after peak season operating results are known, which provides a contingency to temporarily defer capital if earnings in a year do not meet budget.

10.4 Staffing – Summary of Staff Complement

As a result of the temporary closure in the first quarter, the phased re-opening permitted by the Provincial Emergency Order, border closures and the global impact of the COVID-19 pandemic, staffing levels have been dramatically reduced.

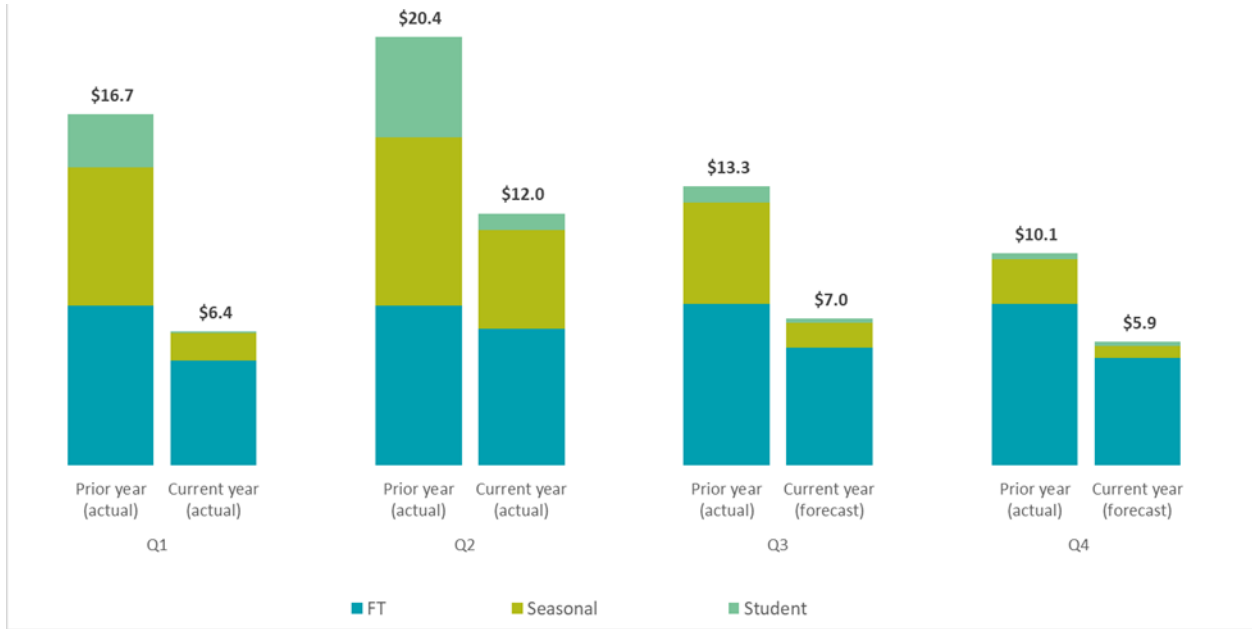
Niagara Parks normally has significant fluctuations in its seasonal and student complement throughout the fiscal year. The original 2020-21 budget, using similar staffing levels as in previous years, included a Full-Time Equivalent (FTE) count of 934. The COVID-19 pandemic has affected Niagara Parks' staffing levels, reducing the forecasted count for fiscal 2020-21 to 439 FTE. To illustrate the impact of COVID-19 closure on the various employee classifications, Table 10.8 below shows a comparison of staffing levels (headcount) for similar pay periods in the current and prior year, and Table 10.9 shows the projected wages and benefits paid per quarter, for the current and prior year.

Table 10.8: Number of Employees Paid (Prior Year versus Current Year)



Forecasted student counts are based on utilizing 20 students as part of the School of Horticulture's paid experiential learning component.

Table 10.9: Wages/Benefits by Quarter, in millions of dollars (Prior Year versus Current Year)



Further details on current human resources initiatives and a corporate organization chart is provided in Section 8 of the Business Plan.



11.0 Information Technology and Electronic Service Delivery Plan

Niagara Parks' Information Technology (IT) division is organized into three functional areas: Network and Infrastructure Services; Application Services; and Helpdesk Services. The following is an overview of the accomplishments of 2019-20 and plans for 2020-21 based on these functional areas.

11.1 Accomplishments of 2019-20

Network and Infrastructure Services

- Improved PCI-DSS compliance by hardening Niagara Parks network, educating staff, implementing new security policies and procedures and deeper network content monitoring. Achieved PCI-DSS compliance version 3.2.1.
- Improved guest Wi-Fi access along Niagara Parkway from Table Rock Centre to Grand View Marketplace.
- Replaced 15 end-of-life switches at critical locations to increase switch security and reduce the risk of switch failure.
- As part of the Table Rock renovations, replaced Retail POS's, refreshed Wi-Fi access points, installed new CCTV cameras and re-cabled network devices.
- Built a second data center with infrastructure (switches, servers, virtual hosting machines) for critical network and application services.
- Implemented 'high availability' with the Niagara Parks second-generation firewall to enable firewall failover.
- Added a virtual host server to provide additional storage and computing power to virtualized servers.
- Refreshed problematic CCTV surveillance devices at select locations to improve safety and security.

Application Services

- Implemented OTT Pay to cater to the Chinese visitor by providing simple, secure and convenient WeChat Pay and Alipay payments at 18 of our locations.
- Implemented new POS and reservation workstations in preparation for Golf Now, a new golf reservation and booking application.
- Refreshed 'end of life' Culinary Aloha servers at ten locations.
- Accesso ticketing solution implemented for Bus Management ticketing.



- Completed RFI and RFP for new Enterprise Resource Planning (ERP) solution to replace the legacy financial solutions for general ledger, project costing and fixed asset ledger.
- Warehouse automation project saw Wi-Fi implemented in the Distribution Center warehouse, addition of new mobile scanners and warehouse management software and label printers implemented.
- Added a secondary internet service provider for critical internet services and payment processing.

Helpdesk Services

- Received and resolved approximately 304 Helpdesk requests monthly with an overall closure rate of 97.2% YTD.
- As part of a planned attrition, refreshed PC desktops and laptops over the age of five years.
- Maintained Helpdesk service levels while increasing network servers, switches, Internet of Things (IoT) and mobile devices.

11.2 Plans for 2020-21

Network and Infrastructure Services

- Build a network fiber branch from Grand View to the Niagara River's lower landing.
- Support the Table Rock renovations Phase II with refreshed POS units, Wi-Fi access points, telephony solutions, multi-function printers, scanners and receipt printers.
- Supplement CCTV surveillance devices at select locations to improve safety and security.
- As part of disaster planning provide the synchronization technologies to enable mutual failover of the two Niagara Parks data centers.

Application Services

- Implement Enterprise Resource Planning (ERP) solution to replace the 'end of life' financial systems.
- Upgrade Retail Pro software to the latest version for retail operations.
- Introduce mobile device management to secure and protect Niagara Parks mobile devices.
- Replace 'end of life' SQL servers used to manage Niagara Parks application data.



Helpdesk Services

- Provide Helpdesk support for a growing number of printing devices, Wi-Fi access points, switches, Internet of Things (IoT), data collections, databases, multi-function printers, mobile devices, telephony devices and other network devices.



12.0 Initiatives Involving Third Parties

Niagara Parks continues to work with partners to achieve its overall operational requirements. Niagara Parks seeks to expand its outreach into regional, national and international communities and organizations that share the common interest of promoting environmental and cultural stewardship, growing tourism and furthering the Niagara Parks brand story. Niagara Parks strengthens its partnership arrangements through the development of agreements on significant initiatives, as well as memorandums of understanding and/or membership as means to providing clarity of the working relationship. The strength of the partnership is contingent on all parties achieving mutually agreed to goals and objectives.

The following chart outlines third party providers to Niagara Parks. It should be noted that Niagara Parks does not provide grant funding to any of the parties below.

12.1 Business Development, Events and Public Relations

Third Party Name	Business Objective	Business Strategy
Hornblower Niagara Cruises	Operator for boat tour service for Niagara Parks under a 30-year agreement that began in 2013.	The boat tour is a Canadian Signature Experience and a key demand generator for Niagara Parks and the destination. Niagara Parks works collaboratively with Hornblower on packaging and promotions to drive higher visitation and revenue.
Niagara Adventure Excursions (operating as WildPlay Niagara Falls)	Operator of two attractions for Niagara Parks: Zipline to the Falls and Whirlpool Adventure Course under a 10- to 15-year agreement that began in 2016.	The zipline and adventure course are two attractions that offer guests an opportunity for an adventurous experience.
Falls Fireworks Series	Activate fireworks series and coordinate the program on behalf of local stakeholders.	Fireworks enhance visitation for all partners. The program runs in the summer (May to Thanksgiving). Fireworks is intended to extend the guests' stay in Niagara Falls, including encouraging overnight stays. The series was cancelled in 2020 as a COVID-19 preventative measure (discourage large group gatherings).



Third Party Name	Business Objective	Business Strategy
Illumination Support of the Falls	Niagara Parks is a member of the Niagara Falls Illumination Board, a not-for-profit corporation made up of 18 representatives from the City of Niagara Falls (Ontario), Ontario Power Generation Inc., City of Niagara Falls (New York), New York State Parks, New York Power Authority.	It is the Illumination Board's responsibility and mandate to finance and maintain the nightly illumination of both the Canadian Horseshoe and American falls. The Falls' illumination is another key activation for the destination.
New Year's Eve (NYE)	Co-host annual NYE show in Queen Victoria Park by way of a contractual relationship with the City of Niagara Falls and other community stakeholders.	This is an important event for the destination to maximize revenue and public relations potential for Niagara Parks and the stakeholders. Its viability for 2020-21 is currently under evaluation.
WEGO Vehicle Transportation System	In August 2011, Niagara Parks and the City of Niagara Falls signed a 10-year agreement to develop an integrated Visitor Transportation System, known as WEGO, to provide a seamless connection between tourist areas within the City and Niagara Parks' sites and attractions.	Niagara Parks received 11 new fully accessible buses (nine articulated/two single buses) as part of the overall \$50 million in funding provided to the City by the federal and provincial governments for this project. Annually \$1.15 million is paid by Niagara Parks to the City as part of a 10-year agreement.
Regional Tourism Organization (RTO)	RTOs have the responsibility for marketing as well as longer-term strategic planning for tourism regions, including product development, workforce strengthening and the provision of travel information.	Niagara Parks serves on the board of the RTO. Participation allows Niagara Parks to take part in and help influence the cooperative advertising and marketing strategies to promote visitation and increased stays within the region.
Scotiabank Convention Centre	Niagara Parks is a founding partner in the Scotiabank Convention Centre in Niagara Falls. Niagara Parks has a seat on the board of directors.	Niagara Parks supports the Convention Centre to help draw meetings and conventions to the destination and Niagara Parks receives business from those conventions.



Third Party Name	Business Objective	Business Strategy
Niagara Falls Tourism	Niagara Parks is a member of Niagara Falls Tourism and serves on the board for the local destination marketing organization.	Tourism is a critical part of Niagara Parks' business and having a strong and well-performing Destination Marketing Organization (DMO) is important in providing marketing programs that benefit the destination and Niagara Parks.
Winter Festival of Lights	Niagara Parks is a founding partner and Board member in this community and Niagara Parks event.	The event draws visitors to Niagara Falls and extends the destination's season. Winter Festival of Lights will be merging with Niagara Falls Tourism in 2020.
Culinary Franchises – Tim Hortons	Niagara Parks owns and operates a Tim Hortons franchise	This franchise provides a recognized quick serve food option to guests and offers Niagara Parks a revenue generating opportunity.
Digital Attractions	Operator of the FX Studio photo capture services at Table Rock Centre and Grand View Marketplace under a five-year agreement that began in 2017. The studio captures photos of guests at Journey Behind the Falls, Hornblower Niagara Cruises, White Water Walk and Butterfly Conservatory.	Operations are also being implemented at Whirlpool Aero Car.
Ambassatours	Operator of an in-park bus tour formerly operated by Double Deck.	The in-park bus tour provides guests with a unique and entertaining tour narration of the history, sights and sounds of Niagara Parks. Operations were suspended for the 2020 season.
Metrolinx	Metrolinx, an agency of the Government of Ontario under the Metrolinx Act, 2006, was created to improve the coordination and integration of all modes of transportation in the Greater Toronto and Hamilton Area.	Promotional partnership with Metrolinx in 2017 to support summer train service to Niagara including bike storage cars on each train schedule. Partnership facilitates access to other Ontario markets as well Metrolinx's broader mandate to encourage and support cycling and active transportation.



Third Party Name	Business Objective	Business Strategy
Destination Canada	Destination Canada, the national marketing organization, promotes Canada as a travel brand in key international markets.	Niagara Parks leverages marketing programs offered by Destination Canada ranging from meetings and conventions, travel trade, digital marketing and travel media relations.
Destination Ontario	Destination Ontario, as the provincial marketing organization and sister agency, provides important marketing initiatives that support Niagara Parks' tourism marketing efforts.	Niagara Parks' leverages consumer, travel trade and travel media relations activities that Destination Ontario develops each year.
Tourism Toronto	Niagara Parks is a member of Tourism Toronto, the official destination marketing organization for Toronto.	Niagara Parks leverages sales and marketing programs offered by Tourism Toronto, including international meetings and convention leads, travel trade and travel media opportunities.

12.2 Environment

Third Party Name	Business Objective	Business Strategy
Environment Canada (Habitat Stewardship Program and Great Lakes Sustainability Fund) and the Ontario Ministry of Natural Resources and Forestry (MNRF) (Species at Risk Stewardship Fund)	To acquire resources needed to protect, maintain and preserve natural areas that make up 25 per cent of Niagara Parks' lands.	In addition, resources are used for education and outreach both internally and externally.
Niagara College and Brock University	Provide expertise for various environmental, recreational and technical programs to support Niagara Parks' stewardship program and Botanical Gardens.	Provide Niagara Parks staff with valuable data. In 2018, Niagara Parks signed a memorandum of understanding with Brock University to collaborate on environmental stewardship initiatives.

Third Party Name	Business Objective	Business Strategy
Science North	Support the Nature Exchange at Niagara Parks' Nature Centre.	Liaise with Science North to manage the Nature Exchange program at the Nature Centre.
Corporate and non-profit support [OPG, Friends Groups, Naturalists, Niagara Peninsula Conservation Authority, Land Care Niagara, MNRF, Ontario Access Coalition (Boulderers), Royal Astronomical Society Club – Niagara Centre, Niagara Geological Society]	Alliances have allowed for environmental, educational and recreational initiatives that Niagara Parks would not otherwise have the internal resources to achieve.	Collaboration provides support for numerous preservation and restoration activities on Niagara Parks' lands.
Forests Ontario	Research and development of tree seed collection strategy for Niagara.	Provides the opportunity to offer seed collection related workshops and training to Niagara Parks staff.
Ontario Power Generation	Improvements on the Lands Protection Program.	Partnership with OPG provides funding and technical support to Niagara Parks in its native tree planting and reforestation efforts.
Monarch Teachers Network, Toronto and Region Conservation Authority and Niagara Falls Nature Club	To increase the education programming and outreach of Niagara Parks' Butterfly Conservatory.	Provides the capabilities to offer educational programming to local teachers and students using monarch butterfly life history along with providing funding to offset monarch workshop costs to participants.
Canadian Food Inspection Agency	Research in management and control of invasive species.	Research in controlling damage from emerald ash borer and hemlock woolly adelgid.
Trail and cycling organizations (Greater Niagara Circle Route, TransCanada Trail, Waterfront Trail, Greenbelt Route, Ontario Trails Council, Venture Niagara, Ontario by Bike)	Increase promotion and development of cycling opportunities and infrastructure within Niagara Parks and the surrounding region.	Provides opportunities for joint marketing initiatives, access to funding and trail management expertise as it relates to the Niagara River Recreation Trail.



Third Party Name	Business Objective	Business Strategy
American Public Gardens Association	Niagara Parks is a member of American Public Gardens Association, a preeminent association for public garden professionals and serves on the board to gain an advanced understanding of the field of public horticulture.	Niagara Parks leverages its board membership to gain insight into best practices, offered through educational and networking opportunities,

12.3 Heritage and Indigenous Programs

Third Party Name	Business Objective	Business Strategy
Parks Canada	Programming Partner	Collaboration on events and tours. Cross-promotional opportunities as appropriate.
Printery Group	Maintain the Printery Collection at Mackenzie Printery heritage site.	Collaborate with local community association to showcase the history of printing.
Wilfrid Laurier University	Archaeology at Old Fort Erie	The Wilfrid Laurier University Archaeology Field School has been actively involved at Old Fort Erie and nearby Bertie Hall over the past five years. It is focused on the 1764 to 1815 period of occupation.
Landscape of Nations 360	Indigenous Education Initiative to provide a comprehensive understanding of the Indigenous experience in the Niagara Region through partnership with indigenous leaders and educators to enhance how Indigenous histories, cultures and contemporary issues are taught in K to 12 classrooms	Supports the Niagara Parks mandate of preserving the cultural stewardship of the Niagara River corridor through recognition of the important role of indigenous people held in the history of the region.

12.4 School of Horticulture

Third Party Name	Business Objective	Business Strategy
Olds College, Olds Alberta	Articulation agreement for Niagara Parks' School of Horticulture graduates to obtain a Bachelor of Applied Science Degree (block transfer).	Supports corporate excellence objective in building the Niagara Parks' School of Horticulture program as a national program of recognition.
Awaji Landscape Planning and Horticulture Academy (ALPHA Academy), Hyogo, Japan	Exchange program allows Japanese students to attend Niagara Parks' School of Horticulture for advanced study and an opportunity for Niagara Parks students to seek internship placements in Japan.	Supports corporate excellence objective in building Niagara Parks' School of Horticulture program globally.
National Association of Landscape Professionals (NALP), United States	This governing body of the landscape industry for North America has accredited Niagara Parks' School of Horticulture program as being the equivalent of a four-year bachelor's degree program.	Supports Corporate Excellence objective in building Niagara Parks' School of Horticulture program as a national program of recognition.
City of Niagara Falls	Schools in Bloom program – Niagara Parks' School of Horticulture students actively participate in a consultative capacity with all high schools in the City to beautify school properties and engage young people in horticulture.	Supports corporate excellence objective and demonstrates commitment to natural and cultural stewardship.
Niagara Catholic District School Board	This partnership allows high school students enrolled in horticulture and a high skills major program in horticulture to complete their studies at the Botanical Gardens with a hybrid teaching model using class lectures with studies in the gardens and working with Niagara Parks' students.	Supports growth of Niagara Parks' diploma program through enhanced reach to potential future students and increases applicants to program.



Third Party Name	Business Objective	Business Strategy
Canadian Wildlife Federation	Memorandum of understanding developed to enable collaborative activities between Niagara Parks and Canadian Wildlife Federation with a focus on education.	Supports development of Niagara Parks' educational programming for Niagara Parks' staff, students and visitors. Provides access to experts in horticulture, forestry and conservation. Further opportunities for ecological restoration and research.
Canadian Garden Council	Continued support as founding member to increase promotion of Niagara Parks, the Botanical Gardens, the School of Horticulture and other Canadian gardens and tourism experiences, education opportunities and to cultivate joint marketing strategies.	Provides opportunity for joint marketing initiatives and access to resources from participating members. Requires further study to develop staffing plan.
Master Gardeners of Ontario, Garden Club of Niagara and Horticulture Society of Niagara Falls	Partnership to provide learning opportunities to visitors, students and members to advance awareness and education (agreement to be developed).	Supports growth and development of the visitor experience at the Botanical Gardens and creates other revenue opportunities for the partners.
School of Horticulture Alumni Association	Promote and support Niagara Parks' School of Horticulture, its current students and alumni.	Niagara Parks staff liaise with the Alumni Association supported by its terms of reference.



13.0 Communication Plan

In 2020, corporate communications will continue to support and implement Niagara Parks' key strategic priorities identified in the 10-year strategic plan and this business plan. In so doing, communications efforts will be aligned and positioned to support the overall strategic directions identified and promoted by the provincial government and the Ministry.

13.1 2020 Business Goals

- Provide external and internal communications support to Niagara Parks' diverse operational units and revenue-generating departments
- Support Niagara Parks' efforts in both its brand management and reputational objectives thereby enhancing Niagara Parks' overall image and financial performance
- Implement a new corporate communication plan, in support of Niagara Parks' 10-year strategic plan objectives and brand initiative, to further Niagara Parks' corporate objectives and reputation
- Support Niagara Parks' change management initiatives as required for the implementation of the 10-year strategic plan
- Continue to build upon Niagara Parks' internal communications efforts and capabilities to ensure support and organization-wide buy-in for strategic and corporate initiatives

13.2 2020 Communications Goals

- Continue to build awareness and support among key stakeholder groups for the strategic plan and the resulting capital/program priorities to be pursued
- Support the continued implementation of Niagara Parks' brand initiative through identifying new and unique storytelling opportunities that promote Niagara Parks' diverse offerings and role as the environmental and cultural steward of the Niagara River corridor
- Increase awareness and understanding of Niagara Parks as a provincially and nationally significant tourism asset with the goal of making Niagara Parks, not only one of the most respected parks agencies in Canada, but also one of the most spectacular Parks in the world
- Continue to enhance and strengthen the relationship between Niagara Parks and its identified stakeholders, ensuring Niagara Parks' vision, mission, economic importance and strategic plan are shared with and understood by these important stakeholder groups, including employees, elected representatives and the general public
- Manage issues proactively to continue to build and enhance the corporate reputation of Niagara Parks



- Provide strategic communication support for key Niagara Parks initiatives in 2020 including: subsequent phases of redevelopment work at Table Rock Centre; adaptive re-use of Canadian Niagara Power and other power plants; ongoing improvements to attraction facilities; environmental and cultural stewardship initiatives; implementation of the Queen Victoria Park master plan; implementation of a new Enterprise Resource Planning (ERP) software to modernize Niagara Parks' financial systems and support contract discussions between Niagara Parks and OPSEU Local 217 (police employees)

Key Target Audiences/Stakeholders

- Niagara Parks employees
- The Government of Ontario
- Residents of Ontario
- The Government of Canada
- The local community – residents, community groups and municipal governments of Niagara Falls, Fort Erie, Niagara-on-the-Lake and Niagara region
- Tourism organizations such as Niagara Falls Tourism, Tourism Partnership of Niagara, the Scotiabank Convention Centre, local BIAs, Destination Ontario, Destination Canada, the Travel Industry Association of Canada, the Travel Industry Association of Ontario, Attractions Ontario, Culinary Tourism Alliance, attraction operators, local hoteliers and golf course operators
- Local, national and international media
- Tourism visitors

13.3 Success Factors

The following factors are critical in achieving the goals of this Communication Plan:

Advance preparation and a proactive approach

Advance preparation and a proactive approach to communications, issues management, and event plans, including the development of key messages, identification of target audiences and tactics are needed to ensure maximum exposure and coverage of Niagara Parks events and initiatives and positive reputational positioning for the organization. This will be managed through the implementation of a new corporate communications plan.



Consistency

Consistency in delivering key messages is fundamental to the success of all corporate communications. Approved key messages will form the basis of all corporate communications related to public-facing events and campaigns, as well as internal corporate initiatives and strategic projects, that are of significant interest.

To ensure consistency, key messages in issues/communications/event plans will be shared in advance with the Chair and CEO as well as with members of the Executive Team who may be required to speak publicly to a matter. Information will also be shared with Commissioners and senior staff as they may be expected to use and deliver these key messages when discussing Niagara Parks business/activities with stakeholders and others. Key messages will also be used to brief Niagara Parks' Guest Services Centre to ensure consistency across all platforms. Additionally, customized key messages will be distributed to directors, managers and supervisors across Niagara Parks to share with frontline staff to help them communicate with and answer questions from the public.

Internal/Employee Communications

Niagara Parks is one of the largest employers in Niagara region. Commitment to internal communications ensures employees have accurate information about any current and/or future activities to be pursued by Niagara Parks for sharing with colleagues, family, friends and associates in the community and region. Internal communications will continue to emphasize the vision and objectives of this Business Plan and the corporate initiatives in the strategic plan. In an effort to reach the largest number of staff, internal communications will take advantage of multiple communication vehicles such as email, Niagara Parks' employee website Our Park, bulletin boards, employee newsletters and face-to-face communications through town halls, executive tours and targeted messaging provided to directors, managers and supervisors to share with their staff.

Many of the strategic plan's initiatives require communications support and plans, especially when an initiative has a direct impact on staff (e.g. venue change, process change, skill change, role change, etc.).

Employee communications will highlight several corporate initiatives being pursued this year such as: the adaptive reuse of Canadian Niagara Power Generating Station; subsequent phases of redevelopment at Table Rock Centre; implementation of the Queen Victoria Park master plan; attraction renewal at White Water Walk, Whirlpool Aero Car and Niagara's Fury; continued environmental and cultural stewardship initiatives; the relocation of floral production operations; and



the implementation of a new Applicant Tracking System and new Enterprise Resource Planning (ERP) software to modernize Niagara Parks' financial systems.

Corporate communications will also assist in the employee communications strategies/activities required to support Niagara Parks' senior staff in reaching mutually beneficial contract agreements with OPSEU Local 217 (police employees).

Communications Protocol with MHSTCI

While Niagara Parks has primary responsibility for communicating decisions/activities, existing ministry/agency protocols with respect to issues management and communications must be followed. The Ministry will continue to be apprised of significant public matters and asked to provide input with respect to key messages and speaking points through regular reporting mechanisms such as the six-week agency roll-out and additionally on a case-by-case basis.

Media Training

As part of the development of a corporate communications plan, this process also includes the provision of professional media training. This training will be available for authorized media spokespersons and will review how the media operates, what information is often requested and include practice/mock interviews. These sessions may also serve to refresh those who have had some media training in the past.

Commitment to Transparency

Niagara Parks is committed to openness and transparency which guides all communications initiatives. This commitment is demonstrated through the distribution and publication of Niagara Parks' Annual Report and Audited Financial Statements, public Board meetings, publication of agendas, reports, minutes and media releases on Niagara Parks' website, the full integration of Niagara Parks' Guest Services Centre to respond to visitor and public enquires and the hosting of public information sessions on key issues and initiatives pursued by Niagara Parks.

13.4 Tactics

Media Relations

Corporate communications, which includes public relations and media relations expertise, contributes to the overall effort to attract visitors to Niagara Parks and Niagara Falls. This combination is critical to achieving the business and communications goals of this plan given limited advertising and marketing budgets.



Earned media coverage through public relations activities supplements advertising buys, maintains the profile of Niagara Parks in major tourism markets and helps open new markets internationally and domestically. Over the first 10 months of the calendar year, Niagara Parks' public relations and media relations activities generated an estimated \$28 million in public relations value.

2020 media relations activities will include:

- Managing an internal corporate and public relations event calendar that will identify all events, milestones and other story opportunities throughout the year to ensure ongoing coverage and a proactive approach to media relations
- Issuing media advisories and news releases for all events and initiatives of media interest to promote Niagara Parks and provide reasons for guests from Canada, the U.S. and international markets to visit and/or return to Niagara Parks
- Issuing corporate news releases proactively to advise the local news media, members of the public, bordering municipalities, relevant stakeholders, etc. regarding infrastructure projects, environmental initiatives, road closures and other public notices to maintain positive reputational positioning among the local community
- Under the guidance of the new corporate communications plan, developing strategies and best practices for informed and targeted media outreach, to better understand our media audiences
- Prioritizing the use of new media such as photo and video assets and seeking out storytelling opportunities with Niagara Parks' marketing team
- Aligning media relations activities with social media campaigns and web content launches to leverage Niagara Parks' digital audiences, build awareness and ensure cohesiveness of messaging, tone and voice across all platforms
- Facilitating editorial board meetings and media interviews for the Chair, CEO and identified spokespersons across all departments
- Continuing to build and maintain positive working relationships with local media to preserve Niagara Parks' reputation as a responsive, open and transparent organization
- Identifying new media contacts on a national and international scale and building strong working relationships
- Updating and increasing corporate communications content on Niagara Parks' digital platforms (e.g. corporate website, employee website Our Park)
- Increasing awareness of the role and importance of Niagara Parks as a provincial and national treasure
- Promoting Niagara Parks as **one of the most spectacular Parks in the world**



Internal Employee Communications

In 2020, internal communications will continue to play a vital role in ensuring all employees have accurate information about future directions/decisions made and the reasons behind those decisions. On an operational level, strong internal communication across departments will help ensure the success of different projects and initiatives, as well as business continuity. In support of this, Niagara Parks will continue to promote communications vehicles designed to foster ongoing dialogue and positive engagement between staff and management, such as:

- The employee newsletter
- Employee updates and communication plans developed in support of strategic plan projects/programs of significance
- Memos/bulletins/all users communications from the Chair and/or CEO which have proven to be valuable in communicating important information to staff immediately and unfiltered, on issues of critical importance to Niagara Parks
- Leverage the effectiveness of in-person communication by providing simplified and targeted messaging for directors/managers/supervisors to share verbally with their staff and to help answer questions
- Newly enhanced employee website, Our Park, with all relevant policies, issues and happenings within Niagara Parks
- Continued support for employee recognition events (United Way, Retirement Dinner/Employee Awards/Christmas Luncheon/Staff Golf tournament) where budgets allow
- The Chair and CEO will meet with Niagara Parks employees in a town hall format to share information on various topics, including Niagara Parks' overall financial performance and strategic plan and objectives for the future (delivery mechanisms for this will be evaluated in for 2020 and potentially beyond)
- The CEO and Executive Team will meet with directors, managers, supervisors to share information on corporate initiatives, strategic and capital projects and to discuss successes and challenges in the workplace (delivery mechanisms for this will be evaluated in for 2020 and potentially beyond)
- Continue holding smaller, more informal group discussions between management and staff on a departmental basis to receive individual concerns and issues faced by employees
- Executive Team visits to all work sites



Stakeholder Outreach Initiatives

Board and public meetings held with residents and municipal councils over the past several years have been successful in demonstrating Niagara Parks' commitment to openness and transparency. In 2020-21, these initiatives will continue and include presentations to local municipal councils/public provide information on Niagara Parks' operations, economic importance and the significant role Niagara Parks plays with the community. Not only is this an educational opportunity, it can also be used to generate feedback and build stakeholder support for issues of importance to Niagara Parks such as:

- Priorities/programs resulting from the strategic plan
- Queen Victoria Park master plan
- Future reuse of Canadian Niagara Power and other former power plants
- Development of new programs – reaching out to stakeholders, soliciting feedback on creation of new event plans, as well as Indigenous tourism and cycling strategies
- Continuation of open Board meetings and public information centres throughout the year
- Hosting regular Public Information Centres to provide members of the public opportunities to meet with Niagara Parks staff, learn about plans and projects and provide feedback

Niagara Parks will also continue to take a proactive approach with industry associations and partnerships it is involved in. While Niagara Parks has established relationships with local stakeholders such as Niagara Falls Tourism and the Tourism Partnership of Niagara, staff also provide regular briefings with organizations such as Destination Ontario, Destination Canada, the Tourism Industry Association of Canada and the Tourism Industry Association of Ontario to better promote Niagara Parks, its goals and its importance to the tourism sector. Niagara Parks' continued relationship with these organizations is threefold:

- Raise awareness of the important and vital role Niagara Parks plays in the tourism industry
- Ensure that the voice of Niagara Parks is not overlooked on issues of importance to Niagara Parks and its role as one of Ontario's premier tourism sites
- Involve Niagara Parks in marketing and promotional events, and other initiatives designed to attract visitors to Niagara Parks, Niagara Falls and the Niagara region

Provincial Government Outreach

As a provincial agency, Niagara Parks has several reporting mechanisms including a Memorandum of Understanding with the Ministry of Heritage, Sport, Tourism and Culture Industries, business plan, annual report, and issues notes designed to inform and ensure its accountability to the Province of



Ontario. In 2020, Niagara Parks will continue with initiatives to increase awareness and understanding of Niagara Parks, its mandate, vision and importance, including briefings and meetings with the Minister, Deputy Minister, MPPs and MPs (federal government) in support of projects and initiatives of importance to Niagara Parks and Niagara region.

Social Media

Niagara Parks' communications team will continue to work collaboratively with Niagara Parks' marketing team to share content so that pitches/releases/advisories written for the mainstream media are repurposed for Niagara Parks' social and digital channels, while visual and written content prepared for web and social are also used for Niagara Parks' corporate communications.

Photography and video continue to be used whenever possible in media relations activities and in social media initiatives to enhance storytelling capabilities. Videos are posted on Niagara Parks' website and social media sites such as YouTube, Instagram and Facebook, as well as shared directly with media using a cloud solution.

Speaking Opportunities

Niagara Parks will continue to seek speaking opportunities for the Chair and CEO regarding Niagara Parks' role, contribution, goals and continued commitment to environmental and historic stewardship and preservation practices.

Niagara Parks will identify opportunities in Toronto and other key media and visitor markets in Ontario to help raise the profile of Niagara Parks. Opportunities in Buffalo and New York will be evaluated as cross-border travel re-opens.

Niagara Parks Website

Detailed information is posted on Niagara Parks' English and French language websites to ensure continued openness and transparency with the public. Niagara Parks will continue to enhance these websites to promote Niagara Parks and increase visitation and sales.

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