



Oakes Garden Theatre

***The Niagara Parks Commission
Three Year Business Plan
(2017-18 – 2019-20)***

Contents

1.0 EXECUTIVE SUMMARY 2

2.0 MANDATE 6

3.0 ENVIRONMENTAL SCAN 8

4.0 STRATEGIC DIRECTIONS 17

5.0 CURRENT & FORTHCOMING ACTIVITIES & IMPLEMENTATION PLAN 22

6.0 RESOURCES NEEDED TO MEET GOALS AND OBJECTIVES 28

7.0 HUMAN RESOURCES 29

8.0 PERFORMANCE MEASURES 35

9.0 RISK IDENTIFICATION ASSESSMENT AND MITIGATION STRATEGIES 38

10.0 FINANCIAL BUDGET AND STAFFING 39

11.0 INFORMATION TECHNOLOGY/ELECTRONIC SERVICE DELIVERY PLAN 47

12.0 INITIATIVES INVOLVING THIRD PARTIES 49

13.0 COMMUNICATION PLAN 50

1.0 EXECUTIVE SUMMARY

The Niagara Parks Commission (NPC) serves as steward over the vast parks system, which extends along the entire length of the Niagara River from Lake Erie to Lake Ontario. Established in 1885, as an agency of the Government of Ontario, NPC is one of the longest-standing agencies of the province with a proud history of service to the public.

Niagara Parks was created by the government in order to seek “the public good” in balancing the public and private interests, in managing the growth and development surrounding one of the great “Wonders of the World.” Structured as a self-funding organization, a strong commitment and innovation are required to balance the need to preserve the natural beauty and heritage of the lands it is entrusted to protect, against the need to generate the required income to undertake its extensive stewardship mandate.

This Three-Year Business Plan (2017-18 – 2019-20), is tailored to meet the requirements of both the Minister’s Mandate Letter and Business Plan objectives of the organization. It also provides a roadmap on how the organization will continue to meet and achieve that sense of balance that has defined the organization, for over its 130 years of operation.

The Ontario Ministry of Finance Economic Outlook in November 2016 notes that Ontario’s economy remains strong, benefitting from low oil prices, favourable U.S. exchange rates and solid U.S. economic growth. The global economic environment remains challenging and growth in the rest of Canada is expected to remain tepid at best. The Ontario Ministry of Tourism, Culture and Sport has forecast an overall increase in U.S. visitation to Ontario for 2017, a slight decline in 2018, then growth again in 2019.

In the 2013 Statistics Canada tourism data, there are over 12.2 million person visits annually to the Niagara Region and over \$1.8 billion in annual spending. The two largest visitor spending markets annually are Ontario travelers at 57% (or \$1.0 billion) and USA travelers at 29% (or \$530 million). As a result, there will be a continued focus on both the U.S. and domestic traveler, primarily from the GTA/Ontario and creating value and offerings for repeat visits.

Each business area has detailed work plans and outputs that support the seven critical pillars to achieve the strategy objectives and emphasizing the use of benchmarking, best practices and continuous improvement. These pillars are as follows:

RESEARCH & DEVELOPMENT: Ensure Commission and administrative decisions are evidence based

HUMAN RESOURCES: Create an operating culture in which innovation and accountability are encouraged

PARTNERSHIPS: Negotiate and maintain mutually beneficial operating partnerships

FACILITIES & TECHNOLOGY: Maintain state of the art infrastructure and equipment

FINANCE: Align financial resources to efficiently deliver products and services

PRODUCTS & SERVICES: Deliver a wide range of educational, recreational and environmental tourism opportunities

IMAGE: Generate interest and excitement in the NPC Brand

Achievement of a positive financial position is one of the objectives identified in NPC's 2013-2017 Strategic Plan. NPC achieved a positive financial position in its March 2016 fiscal year-end and is projected to do so again in the 2017 fiscal year-end.

In its operating budget for the year ended March 31, 2017, NPC projects a positive variance of \$5.853 million from the budgeted net surplus from operations of \$3.350 million, resulting in a net surplus of \$9.203 million for the year. This is primarily due to an increased net contribution (revenues less direct expenses) from Revenue Producing Operations of \$5.689 million, which is a 24% favourable variance over the budgeted contribution of \$24.036 million. The revenue from operations is used by NPC to fund strategic initiatives and capital deficiencies identified in its Asset Management Plan. NPC is undertaking \$10.955 million in capital works for the year ended March 31, 2017, in accordance with its approved budget.

NPC monitors expenditures on a monthly basis and adjusts operating and capital expenditures in line with actual revenue experience. For 2017-18–2019-20, the revenue and expense forecast has been prepared based on attendance for the previous three years, expected revenues from the boat tour operation, revenues from the Zip Line Program which commenced in 2016, and other assumptions as outlined in Section 10.

Highlights of the financial results for NPC projected for the year ended March 31, 2017 and the budget for fiscal years 2018 through 2020 are summarized in Table 1.1 below.

<i>(thousands)</i>	CURRENT FISCAL YEAR			FUTURE YEARS		
	BUDGET	PROJECTION	VARIANCE	BUDGET		
			TO BUDGET	Apr. 2017	Apr. 2018	Apr. 2019
	Apr. 2016 Mar. 2017	Apr. 2016 Mar. 2017	Apr. 2016 Mar. 2017	Mar.2018	Mar.2019	Mar.2020
Total Revenue	\$ 95,401	\$ 105,637	\$ 10,236	\$ 109,617	\$ 111,545	\$ 112,859
Total Expenses	\$ 82,471	\$ 86,821	\$ 4,350	\$ 90,202	\$ 91,700	\$ 92,870
Net Surplus Before Interest & Depreciation	\$ 12,930	\$ 18,816	\$ 5,886	\$ 19,415	\$ 19,845	\$ 19,989
Loan Interest	\$ 1,513	\$ 1,473	\$ (40)	\$ 1,393	\$ 1,332	\$ 1,277
Amortization of tangible capital assets	\$ 9,032	\$ 9,032	\$ -	\$ 9,183	\$ 9,400	\$ 9,500
Amortization of deferred capital funding	\$ (1,670)	\$ (1,597)	\$ 73	\$ (1,532)	\$ (1,562)	\$ (1,593)
Net increase in Power Plant Obligation	\$ 705	\$ 705	\$ -	\$ 705	\$ 705	\$ 705
Net surplus	\$ 3,350	\$ 9,203	\$ 5,853	\$ 9,666	\$ 9,970	\$ 10,100

NPC does not receive operating grants from the Province. From time to time, NPC receives capital grants from the Province.

A prioritized and strategic capital plan self-funded from operations is vital to NPC's fiscal health. NPC's capital plan of \$18.378 million for fiscal 2018 is prioritized and based on funding available from operations. NPC recognizes the importance of long term asset planning and has incorporated an analysis of asset condition, forecasted needs and replacement strategy in Section 10 of this Business Plan.

The 2017-18 operating budget has been prepared on the basis that the economic outlook for Ontario tourism in the upcoming year will be similar to that experienced in the current year. The sensitivity of NPC's revenues to economic risk factors, including changes in exchange rates,

interest rates and oil prices all have an impact on discretionary household income available for domestic and international tourism activities.

Following are the highlights of some of the key accomplishments of NPC during 2016-17, categorized by strategic focus element:

Research & Development

- Completed inpark surveys of visitors as part of NPC's market research
- Commenced work on a 10-year Queen Victoria Parks Masterplan with the goal of being one of the top ten parks in the world
- Continued update and consolidation of existing studies in preparation for procurement processes to redevelop the three historic generating stations on NPC property
- Researched and procured new technology for attractions ticketing

Human Resources

- Implemented new technology for Human Resources, Payroll and Timekeeping and modernized associated workflow and transaction processing
- Conducted an employee survey to plan, manage and improve human resources transparently
- Added a new training room in the Human Resources building

Partnerships

- Participated in a bi-national project with the Illumination Board to install new, state-of-the-art LED lighting to encourage new and repeat visitation to Niagara Falls, greater energy efficiency and reduced maintenance costs
- Worked with Winter Festival of Lights to bring new programming to fruition
- Participated with Town of Niagara-on-the-Lake and the Bicentennial Working Group to establish a War of 1812 native memorial – *Landscape of Nations* – which is situated upon the lands of NPC's Queenston Heights Park, within the earthworks of Fort Riall
- Implementation of the Chippawa Grassland Bird Habitat Management Plan

Facilities & Technology

- Completed renovations at NPC office facilities and relocated administrative staff from the leased facility at Dunn Street in order to bring staff teams together and improve the overall functioning of individual departments
- Extended fibre network and WiFi connectivity and extended Voice Over IP (VoIP) across NPC locations within the fibre network, consolidating phone systems and phone lines while increasing functionality
- Completed \$1.4 million in funded improvements to NPC facilities which were identified as 'critical, code compliant or imminent breakdown' in NPC's asset condition database (AMIS)
- Implemented improvements to Oakes Garden Theatre, including replacement of the pergola wall and construction of an accessible walkways and entrances
- Continued the formal process for the redevelopment of the NPC Marina at Miller's Creek and implemented capital improvements to facilities
- Met its commitment to the stewardship of Ontario's provincial heritage properties and its partnership in implementing Standards and Guidelines. NPC received Ministry approval of the NPC's Heritage Identification and Evaluation Process, acting under the Standards and Guidelines for Conservation of Provincial Heritage Properties (Ontario Heritage Act)
- Commenced design work for lower Table Rock facility redevelopment
- Made break-wall improvements along the Parkway in Fort Erie

Finance

- NPC is projecting to exceed its budgeted net surplus of \$3.35 million by \$5.853 million

Products and Services

- Opening of the new Falls Zip Line attraction, with improved accessibility at Grandview Market Place including a lift to the viewing platform and Zip Line launch area
- Construction of Aerial Adventure Course at Thompson's Point, to open in Spring 2017
- Leveraged the centennial anniversary of the Whirlpool Aero Car attraction with a series of summer promotional events and programming activities and infrastructure improvements to commemorate this special milestone
- New digital and photo capture vendor program

Image

- Second year of the three-year brand development strategy to clearly define and craft an enduring brand story and identity of NPC, backed by comprehensive research, vision, and represented through a strong visual identity

The following key priorities for 2017 - 20 are outlined below:

- Position NPC as a worldwide Park experience and strengthen our global identity and brand
- Grow revenue sources to \$125 million per year by 2025 to sustain operations well into the future
- Make further investments in systems, technology, infrastructure and people
 - Focus on the following key initiatives:
 - Updated Strategic Plan for NPC
 - Launch brand initiative
 - Continue with 10-year Masterplan Development in Queen Victoria Park Area
 - Procurement for redevelopment of NPC Marina at Miller's Creek
 - Complete redevelopment strategy for heritage power generating facilities
 - Meeting obligations under the Standards and Guidelines for the Conservation of Provincial Heritage Properties under the Ontario Heritage Act
 - Canada/Ontario 150 Programming: Rooted in the Garden
 - Attraction Renewal: Table Rock lower level
 - Forestry Management Program
 - Systems improvements
 - Payroll & Timekeeping
 - Ticketing for Attractions and Parking
 - Digital and Photo Capture Program
 - Additional WEGO in rotation (Summer)

These current and forthcoming projects and activities are more fully described in Section 5 of this Business Plan. Resources are available to implement these priorities in NPC's operating and capital budgets.

These priorities align with the Ministry of Tourism, Culture and Sport's priorities to support a dynamic business environment that builds vibrant communities, attracts tourists, strengthens the economy and creates jobs.

2.0 MANDATE

In 1885, Sir Oliver Mowat's government tabled a Bill entitled *An Act for the Preservation of the Natural Scenery about Niagara Falls*. Two years later, the Legislature passed *The Queen Victoria Niagara Falls Park Act*. This Act established The Niagara Parks Commission (NPC), outlined its powers and duties and defined its mandate to manage, control and develop the Parks.

The Niagara Parks Act

NPC operates today under the provisions of *the Niagara Parks Act, R.S.O. 1990, Chapter N.3*. Section 4 of the Act sets forth the General Powers and Duties of the Commission. Specifically, the Legislation indicates "It is the duty of the Commission to manage, control and develop the Parks..." Section 4 of the Act then provides a list of 15 general powers and duties. Among these are the power to "layout, plant and enclose the Parks" and the ability to "appoint such auditors, officers, clerks, keepers, gardeners, and other persons that may be required."

Founding Principles

In addition to these specific legal powers and duties, Niagara Parks was established on two founding principles, which continue to guide its operations to this day. These two principles are:

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

Agencies and Appointments Directive

NPC operates within the accountability framework of the Province as set out in the 2016 "Agencies and Appointments Directive" (AAD). This Directive outlines the various accountability mechanisms that are to be established between an agency and its relevant Ministry. Included in this is the development of a Memorandum of Understanding, and the submissions of Annual Reports, the Annual Multi-Year Business Plan and Quarterly Risk Assessments, a requirement for external audits to be completed and procedures for financial reporting and periodic reviews that will take place. In May 2016, NPC submitted the required attestation to the Minister that it is in compliance with the reporting, legislative and control requirements of the AAD.

In accordance with this Directive, NPC has been classified as a Board-Governed Provincial Agency of the Ministry of Tourism, Culture and Sport. A Board-Governed Agency is an Agency that has the authority to make operating decisions. The Board of Directors is therefore a governing board. As a Board-Governed Provincial Agency, NPC has the financial and operating authority to carry on a business and conduct operations in support of its mandate. The Board of Directors is accountable to the Minister of Tourism, Sport and Culture for the achievement of its mandate, and the Chair is the Board's representative to the Minister.

Operational Enterprise Classification

NPC is further classified as an Operational Enterprise which provides the authority to sell goods or services to the public in a commercial manner and to receive revenues from its commercial activities. NPC's classification as an Operational Enterprise Board-Governed Provincial Agency affirms the Government's intent and expectations for NPC to pursue sound fiscal management strategies. By operating its own commercial facilities and by negotiating partnership agreements

with others, NPC has been able to generate the profits necessary to fulfill its self-sufficiency principle and its significant stewardship responsibilities. By structuring NPC as an economically self-sufficient organization reporting to the Ministry of Tourism, Culture and Sport with oversight and control placed in the hands of an appointed Board, NPC effectively operates for the benefit of the people of Ontario.

Mandate Letter

A requirement of the AAD is for Ministers to issue mandate letters to the Chairs of all Board-Governed Agencies on an annual basis, outlining the Minister's broad expectations with respect to service and performance priorities for the coming fiscal year. NPC's mandate letter for 2017-18 outlines the Minister's expectation that NPC will align its planning to the Ministry of Tourism, Culture and Sport priorities of "supporting a dynamic business environment that builds vibrant communities, attracts tourists, strengthens the economy and creates jobs." NPC's Business Plan supports these priorities through strategies that continue its environmental and cultural stewardship roles in preserving NPC's lands and heritages features. NPC's three-year operating budget and 10-year capital plan incorporate financial self-sufficiency through revenue growth, management of expenses and improving the state of NPC's assets through capital investment.

To achieve and maintain the highest levels of accountability, NPC will review and enhance governance, fiscal management and sustainability and accountability processes to reflect best practices and ensure compliance with Treasury Board/Management Board of Cabinet direction as well as the new requirements with respect to executive salaries and compensation. NPC also will maintain an effective system of internal controls and compliance with applicable requirements to promote transparency and accountability and will manage financial, operational and strategic risks to help ensure business objectives are met. For 2017, NPC will deliver special programming that celebrates Canada's and Ontario's 150th anniversary.

Stewardship

The stewardship role assumed by NPC remains significant to its accountabilities since its inception. NPC is expected to preserve and commemorate the historical, cultural and environmental significance of the Niagara River corridor. In fulfilling this important public mission, NPC provides a myriad of public and community services and assumes an important stewardship role on behalf of the Province of Ontario. During 2016, Ministry approval of NPC's Heritage Identification and Evaluation Process was received, under the Standards and Guidelines for Conservation of Provincial Heritage Properties (Ontario Heritage Act), demonstrating NPC's continued commitment to the stewardship of Ontario's provincial heritage properties and partnership in implementing Standards and Guidelines.

Mission Statement

It is important that the mission of Niagara Parks is consistent with the mandate which is contained in the Niagara Parks Act. The mission must recognize the location of the mandate (i.e. along Niagara River), for whom the mission is fulfilled (the visitors), and the accountability in fulfilling the mission (financial self-sufficiency). *Niagara Park's mission is to protect the natural and cultural heritage along the Niagara River for the enjoyment of visitors while maintaining financial self-sufficiency.* The vision of NPC is as follows: *Ontario's Niagara Parks – PRESERVING a rich heritage, CONSERVING natural wonders, INSPIRING people, worldwide!*

3.0 ENVIRONMENTAL SCAN

Year in Review

The Niagara Parks Commission (NPC) and the tourism industry of Niagara entered 2016 looking to build on the positive momentum and growth, generated by a tourism renaissance experienced in both the Ontario and Niagara tourism industries, in 2015.

Strategic investments in new attraction development, infrastructure renewal and a celebration and emphasis on this region's unique history, were all expected to play a significant role in helping to generate a renewed sense of excitement and interest in Niagara and Niagara Parks.

The year started off quickly, as Niagara Parks and its partners on the bi-national Niagara Falls Illumination Board, worked to gain local stakeholder support for its vision to improve overall illumination of both the American and Canadian Horseshoe Falls. It had been almost 20 years since the last major investment in lighting infrastructure was made and the recent success of high profile events such as the Nik Wallenda high wire walk and Red Bull Crashed Ice, had proven the tremendous potential enhanced lighting could provide to the visitor experience at the Falls.

After conducting stakeholder briefing on both sides of the border, on the benefits of new LED lighting technology, the Illumination Board was able to gain the support necessary, including obtaining \$350,000 in financial support from NPC, to implement its \$4 million revitalization project and vision of what the nightly illumination of Niagara Falls could be. The newly enhanced illumination of Niagara Falls, which was unveiled on December 1, 2016, now provides more than twice the current lighting levels of the Falls, than was previously achieved. This enhancement also provides programmable lighting opportunities and a broader, more robust colour spectrum for visitors to enjoy. As well, given the technology improvements implemented, the newly enhanced lighting system eliminates many of the previous dark gaps experienced, while also providing the board with greater energy efficiencies and reduced maintenance costs.

The objective of the Illumination Board in proceeding with these enhancements was to continue its support of the destination and to advance Niagara's position as an international tourism icon. It is expected the enhanced illumination of both the American and Canadian Horseshoe Falls will draw both new and repeat visitation to Niagara and serve to extend visitor length of stay.

Promotional efforts and the eventual opening of NPC's newest attraction, WildPlay Niagara's MistRider Zipline, also served as a tremendous catalyst in highlighting Niagara Parks, as a destination worth visiting in 2016. On Wednesday, July 20, the grounds of Queen Victoria Park, served as the site of this exciting opening, as Niagara's Parks newest tourism experience took flight. Designed to enhance the overall tourism offerings within Niagara Parks, WildPlay's MistRider Zipline to the Falls consists of four parallel lines that take guests on a 670 metre (2,200 foot) long scenic ride from Niagara Parks Grand View Marketplace to the historic Ontario Power Company building located within the Niagara Gorge. Since its opening, over 48,400 visitors (July-September) have taken part in this newest way to experience the beauty and majesty of Niagara Falls.

While offering new ways to interpret the Falls and the Niagara Gorge, the attraction also allowed for infrastructure enhancements to be realized at NPC's Grand View Marketplace. For example,

a new lift was installed, providing access to not only the launch area of the Zipline, but to an existing viewing platform as well, which was previously inaccessible to persons with disabilities. This enhancement now offers the opportunity for all visitors to enjoy the breathtaking views from this vantage point.

Just as important, between July and September of 2016, the attractions opening helped garner tremendous positive media attention for Niagara Parks, resulting in over 960 articles and mentions viewed and reported on, world-wide. According to NPC's media monitoring service, Meltwater, this renewed focus on Niagara helped generate over \$15.3 million in earned (free) media advertising value for Niagara Parks and its attraction partner, WildPlay Niagara Falls.

Building on this success, the Commission also entered 2016, ready to celebrate some significant milestones, including the centennial anniversary of its Whirlpool Aerocar attraction. Since it began operating in 1916, the Whirlpool Aero Car has carried millions of tourists safely over the Niagara River, offering unparalleled views of both the whirlpool rapids and Niagara Gorge.

The continued operation of the Aero Car is a living testament to the brilliance and foresight of its original Spanish designer, Leonardo Torres Quevedo. As part of its overall celebrations, Niagara Parks was pleased to host a 100th anniversary ceremony and plaque unveiling on August 8, where it was joined by his Excellency, H.E. Carlos Gómez-Múgica Sanz, the Spanish Ambassador to Canada, along with 27 members of the Torres Quevedo family, including his Great-Grandson, Carlos Torres Quevedo, who came to Canada to help commemorate this significant event.

NPC also leveraged the importance of the Aero Car with a series of summer promotional events and programming activities to commemorate this special milestone. For example, NPC's Culinary Services featured Spanish inspired menu items and an Aero Car Ale from Niagara College, which was served at its Elements on the Falls and Queen Victoria Place Restaurants. Niagara Parks Retail operations also offered Aero Car themed souvenirs, while the Commission's Marketing team added Aero Car stories to NPC's social media channels to promote this commemorative event world-wide. Infrastructure improvements were also realized, as NPC's Engineering unit facilitated capital improvements at the attraction, including work on the Aero Car itself, renovated public washrooms and a new covered dining area.

To help mark the 80th anniversary of NPC's Oakes Garden theatre in 2017, Niagara Parks has also initiated much needed rehabilitation work at the Theatre and its adjoining Rainbow Gardens. In 2015, new accessible entrances and pathways were constructed to enhance the public facility and this past year, with matching funds provided by the Federal Government's Canada 150 Community Infrastructure Program (\$550,000), NPC was able to undertake restorative work on the Theatre's pergola wall, which was removed in 2012, due to structural concerns.

With work on the pergola wall now complete, NPC engineering staff have also set themselves to the task of completing additional rehabilitation work (\$320,000) to the Theatre's perimeter stone retaining wall, which faces out along the Niagara Parkway.

With Canada's sesquicentennial soon approaching, NPC has been pleased to undertake this work, as the Theatre and its associated gardens are outstanding examples of design and architecture created to specifically act as a dramatic gateway into Canada, which showcase Canadian art,

architecture and craftsmanship; all in order to enhance the visitor experience within the Niagara Parks system.

As well, NPC will be co-hosting the American Public Gardens Association Conference in 2017, with a Niagara Day to be held on June 22 that will culminate with a dinner event at Oakes Garden Theatre. Additional programming is also being planned for the site, including a Citizenship Ceremony, to properly commemorate the theatre and country's anniversary celebrations.

As home to the largest concentration of War of 1812 sites and battlefields anywhere in Canada, Niagara Parks takes great pride in managing these national heritage sites and in helping Canadians and international visitors better understand the rich history of this country and the important contributions the residents, soldiers and warriors of this region, made to the development of Canada. It is in this light that on Sunday October 2, NPC was pleased to take part in the official unveiling of the **Landscape of Nations**, War of 1812 Native Memorial, which was placed on the historic grounds of Queenston Heights Park.

Given the significant involvement of Niagara Parks in the preservation of several War of 1812 sites within the region, the Commission was pleased to be involved in this project from the very start, as we sought to honour and formally recognize the contributions of The Six Nations and their native allies during the War of 1812. The memorial is an important heritage destination asset for Niagara Parks and is intended to serve as an educational beacon illuminating the critically important contributions Native peoples made to Canada during its formative years.

In keeping with this theme of renewal, NPC also entered the year committed to making strategic investments to support the work and efforts of its own employees. As an example of this, during the summer, NPC initiated a second employee survey, to gauge the views and impressions of its staff. Initiatives such as the employee survey are tremendously important. Based on the results from the last survey, conducted in 2013, over 100 improvements were made flowing from suggestions and responses provided by NPC employees. The survey results from 2016, were recently shared with staff and they will now be used to create further action plans to improve overall employee engagement, performance and productivity by the Commission overall.

With NPC's lease expiring at the Niagara College Dunn Street campus this past spring, senior staff undertook a rationalization of office space at the Commission's Oak Hall, Distribution Centre and Maintenance Centre facilities. Sixty-three staff moves were facilitated as a result of this change in order to bring staff teams together and improve the overall functioning of individual departments.

NPC also launched a new Learning Management System (LMS) for full time staff to facilitate on-line learning and to create a more effective tracking and reporting mechanism to ensure corporate-wide training. The launch of the new LMS tool for seasonal staff will take place in 2017 calendar year.

Niagara Parks is currently in the process of implementing a new Payroll/Time and Attendance/Human Resources system through ADP Canada which will eliminate antiquated paper time keeping systems, facilitate employee self-service and improve reporting. This system is scheduled to go live in early 2017.

Hosting important events, enhancing revenue producing operations, obtaining positive media coverage and making investments in key Park infrastructure are but some of the factors in the economic recovery that has taken root in the tourism industry in 2016. Tremendous weather conditions, continued economic growth in the United States, lower oil and gas prices, combined with a low Canadian dollar have all benefited the Canadian tourism industry.

Statistics Canada data provided by the Ontario Ministry of Tourism, Culture and Sport confirm this, as American visitation to the Province continued to rebound significantly in 2016, as U.S. border crossings into Ontario increased by 9.5% over the first eight months of the calendar year. This visitation growth and its associated spend have been a significant factor in the economic improvements realized by NPC, as U.S. visitors to the Park represent the largest segment of NPC's current visitor mix. In fact, 62.6% of all respondents to NPC's customer survey, conducted in the spring and summer of 2016, identified themselves as being a resident of the United States.

Given the lower value of the Canadian dollar, more and more Canadians sought vacations closer to home and Niagara Parks and the Niagara tourism industry were the beneficiaries of this trend. Statistics Canada data supplied by the Ontario Ministry of Tourism, Culture and Sport reported that over the first eight months of 2016, Canadian visitors' returning from the U.S. into Ontario continued to show signs of a steady decline, dropping by 9.2%. As a result, domestic visitation to NPC, primarily from visitors from the Greater Toronto Area (GTA), helped play an important role in the tourism recovery experienced in 2016. According to NPC's recent customer survey findings, homegrown visitation represents NPC's second largest market segment, with 29.2% of all respondents identifying themselves as being from Canada.

The growth of overseas visitation to Ontario continues to be a bright spot, as international visitation rose by 12.1% during the first eight months of 2016; a reflection of the strong growth being experienced in both traditional tourism markets such as the U.K. +17%, Germany +10.7%, Japan +6.5% and Mexico +11.7%, as well as in new and emerging markets such as China (+20.0%), South Korea (+33%), India (+12.5%) and Brazil (+28.6%). Of the 13 countries monitored for travel into Ontario over this eight-month period, only 1 reported a decline in visitation that being Brazil at -5.8%).

As a result of this growth in visitation, overall attendance at NPC's attraction venues was up by 3.1% over the first seven months of the fiscal year. This strong growth helped propel an overall increase in gross revenues earned by the Commission.

While this growth in visitation and its associated spend can be in part explained by economic factors such as the low value of the Canadian dollar, it is important to remember that more is needed to sustain a healthy tourism economy. Niagara Parks is well aware of this, and has implemented greater investments in new products and services, marketing and brand development, as well as an enhanced value proposition with its unique Niagara Parks focused Pass products, in order to drive continued visitation to Canada's most recognized tourism destination.

2017 External Overview

Entering the 2017 calendar year, continued economic growth in the U.S. economy is forecasted to support continued U.S. tourism visitation to Canada.

According to both the Bank of Nova Scotia and Toronto Dominion, U.S. economic activity (Gross Domestic Product - GDP) is forecasted to grow by 2.2% in 2017. According to TD Economics, in its September 22, 2016, TD Economics report, "Job growth has remained resilient, and household spending is flying high..." This viewpoint has been confirmed by recent employment data supplied by the U.S. Department of Labor, which indicated in its October 2016 Jobs report, that 161,000 jobs were created in the month and that unemployment levels in the U.S. were down to 4.9%. In addition, "overall wage growth was up 2.8 per cent, over the last 12 months, the largest increase since the Great Recession...."

In terms of the Canadian economy, the Bank of Canada has forecast national economic growth of only 1.1 per cent this year, followed by 2 per cent growth in 2017. These numbers match closely those of both the Bank of Nova Scotia and Toronto Dominion, which forecast 2 per cent and 1.8 per cent growth in 2017. In support of these assessments, the Bank of Nova Scotia indicated, it expected this growth to be "supported by infrastructure spending, stronger exports, and a gradual turnaround in oil and gas sector investment." Somewhat troubling, the Bank went on to add, "the combination of high household indebtedness, a lack of pent-up demand and soft employment and income trends could temper consumer buying plans." This bears watching, as the tourism economy is very much a discretionary based economic activity.

In response to suggestions such as this, the Federal Government announced renewed investments into the Canadian economy, as a way to spearhead future economic growth and activity. In his financial update to Parliament on Tuesday, November 1, 2016, Federal Finance Minister, the Honourable Bill Morneau, acknowledged what the private forecast had suggested, when he indicated, "Our economy is growing, just not as fast as we'd like." In recognition of this fact, the Minister announced measures "to invest more dollars, over a longer period of time, so that we can create good jobs now, and set our workers, business and communities up for success in the future."

Ontario's Minister of Finance, the Honourable Charles Sousa, presented his own Economic Update in the Ontario Legislature on November 14, 2016. In his statement, the Minister indicated that the Ontario economy continued to grow and had, over the first quarter of this year, "grown faster than that of the United States and the G7." As such, the Provincial Government is forecasting real GDP growth within Ontario as being 2.5% for 2016 and 2.2% in 2017. According to the Ontario Ministry of Finance, "steady growth in the U.S. economy, along with the ongoing impacts of a more competitive Canadian dollar and low oil prices, continue to support Ontario's economic growth."

Both the Bank of Nova Scotia Global Forecast and TD Economics project little in the way of sustained economic growth in Europe in 2016, with both forecasting modest growth of between 1.4% (Bank of Nova Scotia) and 1.6% (TD Economics) for the coming year. While higher growth levels continue in some of the emerging economies of Asia (China and India), this too has eased. As a result, the Organization for Economic Cooperation and Development (OECD) in its June 1, 2016, economic forecast, reported that it expected the global economy to grow by only 3.3% in 2017. As the OECD indicated, "Global growth has languished over the past eight years..." and that "Policymaking is at an important juncture. Without comprehensive, coherent and collective action, disappointing and sluggish growth will persist, making it increasingly difficult to make good on promises to current and future generations."

2017 Internal Overview

Looking towards the future, Niagara Parks has identified several projects and initiatives that it will be undertaking over the course of this three-year business plan. These plans will be implemented in such a way, as to support the government's own objectives and that of the Ministry, in "supporting a dynamic business environment that builds vibrant communities, attracts tourists, strengthens the economy and creates jobs."

To do so, NPC will continue to make key investments in its systems, technology, infrastructure and people to ensure the Commission's continued relevance as an agency responsible for the promotion and preservation of the heritage and lands it is entrusted to protect, all along the Niagara River corridor.

Entering the 2018 fiscal year, Niagara Parks continues to move forward with its plans to enhance and improve the overall operations of its Niagara Parks Marina. NPC's continued vision for the Marina and its associated lands is to create a regionally unique, recreation destination, which is appropriate to the Parkway and its historical river setting. This vision is based on the establishment of an exceptional public marina facility that will be developed in an economically and environmentally sustainable manner. It will also provide easy and convenient access to all the attractions along the Niagara Parkway.

Given the financial improvements realized by the organization in the 2016 fiscal year, Niagara Parks will be in a position to make greater investment in its continually aging infrastructure and facilities. In the 2017 fiscal year, NPC was able to allocate 10.955 million toward its capital works projects, with approximately \$7.5 million of that coming directly from its own revenue producing operation. In the coming fiscal year (2018), NPC is projecting \$18.378 million will be devoted to infrastructure improvements.

These investments are over and above what is required by NPC to maintain three significant former hydro-electric generating stations, which were transferred to Niagara Parks: Toronto Power Generating Station (TPGS), and Ontario Power Generating Station (OPGS), were transferred to NPC by Ontario Power Generation Inc. (OPG) in August 2007, and The Canadian Niagara Power Generating Station (CNP), formerly owned by Fortis Ontario, which was turned over to Niagara Parks in April of 2009.

These assets, all built at the turn of the 20th century, represent a large financial liability which the Commission is in no reasonable position to assume fiscally. As a result, in 2017, NPC will begin the process of undertaking stakeholder consultations, as well as completing its strategic conservation plan for the sites, so that it may be in a position to move toward a future Request for Proposals on possible adaptive reuse of these buildings.

Following on the successful first phase improvements made to NPC's Table Rock Complex, additional work is now required to further the potential of this most important revenue generating and Welcome Centre facility. In 2015, improvements were made to NPC's Journey Behind the Falls attraction, including enhancements to its ticketing plaza, to create a greater sense of arrival and awareness for visitors to this attraction. In the winter of 2016, new elevators were then installed and a new HVAC system brought online to serve the varied needs of the site, while improving conditions for both visitors and staff.

As the 2018 fiscal year approaches, additional work is planned with the establishment of canopies over the main visitor entrances of the building, to protect individuals from the ice build-up, which occurs as a result of heavy mist, during the winter months. Planning is also to take place for the redesign and repositioning of the current NPC Welcome Centre on the lower level of the building to help improve pedestrian flow, facilitate greater customer service and enhance access to NPC’s culinary and retail establishments on that level.

During 2017 the Commission will undertake the development of a new Strategic Plan, to develop a common vision and help establish a strategy that will outline new goals and objectives, to lead the organization forward.

Entering the year, the Commission’s Parks Department will also begin work on a Master Plan for Queen Victoria Park (QVP). The development of the Master Plan for QVP will be based upon NPC’s mission and mandate, as well as its goal of being one of the top ten parks in the world. The long term planning document will assist NPC with ensuring consistent principles and a coherent vision for any major redevelopment of NPC properties.

With Canada and Ontario’s sesquicentennial soon approaching, NPC was delighted to learn that it had received Provincial approval and support in the amount of \$563,000, as part of the Ontario150 program, to host a series of themed events, activities and programming to engage Ontarians. Five specific initiatives, all based on a central theme of *Rooted*, will allow the Commission to expand its offerings and programming, by highlighting the natural and cultural significance of the lands NPC is entrusted to protect.

NPC’s Marketing Department has also undertaken a Brand Redevelopment Project, which aims to collaboratively redevelop the NPC brand. The objective of the project is to clearly define and craft an enduring brand story and identity of NPC, backed by comprehensive research, vision, and represented through a strong visual identity. Now in year two of this project, NPC is currently conducting its Brand Audit. NPC has also initiated a Web Redevelopment project, which is staged for launch just after the new brand development, so as to coincide with it.

As mentioned earlier, several system improvements will also be pursued during the 2018 fiscal year to assist the Commission. This includes final implementation of the new ADP Payroll/Timekeeping system, the selection of a new ticketing and sales system to support NPC’s Retail, Attractions and Parking units, and the implementation of a new digital and photo capture vendor/program for Niagara Parks. NPC will also continue to roll-out its new on-line Learning Management System to all staff, as well as improve its visitor transportation capabilities, with an additional WEGO shuttle, serving the Green Line during the summer high-volume periods.

**Economic and Visitation Forecast –
2016 Economic Forecasts for Remainder of the Calendar Year**

Global GDP Forecast REAL GDP	Scotiabank Group 2016 Forecast October 17, 2016	TD Economics 2016 Forecast September 22, 2016
Canada	1.2%	1.1%
U.S.	1.5%	1.5%
Mexico	2.4%	1.8%
Eurozone	1.4%	1.6%

United Kingdom	2.0%	1.7%
Germany	1.5%	1.8%
France	1.2%	1.3%
Japan	0.6%	0.7%
China	6.6%	6.4%
India	7.5%	7.4%
Brazil	-3.1%	-3.2%

2017 to 2019 Ontario Ministry of Tourism, Culture and Sport Visitation and Total Expenditure Forecasts

In its most recent forecast of U.S. visitors to Ontario (as of November, 2016), the Ministry of Tourism, Culture and Sport has forecast an overall increase in U.S. visitation to Ontario for the 2017 and 2019 tourism years. With an economic recovery, slowly starting to take hold south of the border, American discretionary spending has accelerated, resulting in an increase in visitation and spend in the Province, and it is hoped this trend will continue over the course of this Three-Year Plan.

2017 – 2019 Visitation Forecasts – Visits from the United States to Ontario

According to the Ministry, U.S. visitation during the course of this Three-Year Plan is expected grow in 2017, remain stagnant in 2018, then grown again in 2019:

- 2017 – 13,812 million visits (7.6% growth projected for the year)
- 2018 – 13,774 million visits (-0.3% decline projected for the year)
- 2019 – 14,235 million visits (3.3% growth projected for the year)

2017 – 2019 Total Expenditure (\$millions) Forecasts – Visits from the United States to Ontario

According to the Ministry, U.S. total expenditures by U.S residents in Ontario is expected to experience steady growth over the course of this Three-Year Plan Business Plan:

- 2017 – \$4,670,000,000 (10.0% increase in spend projected for the year)
- 2018 – \$4,982,000,000 (6.7% increase in spend projected for the year)
- 2019 – \$5,219,000,000 (4.8% increase in spend projected for the year)

2017 – 2019 Visitation Forecasts – Ontario Visits within Province

Over the course of the next three years, the Ministry is forecasting minor growth in visitation from Ontario residents travelling within the Province:

- 2017 – 128,790 million visits (1.4% growth projected for the year)
- 2018 – 130,840 million visits (1.6% growth projected for the year)
- 2019 – 132,840 million visits (1.5% growth projected for the year)

2017 – 2019 Total Expenditure (\$millions) Forecasts – Ontario Visits within Province

With continued economic growth in the Ontario economy expected, the Ministry has projected spending by Ontario residents within the province to experience strong growth in 2017, followed by lower growth in years two and three of this Business Plan:

- 2017 – \$15,743,000,000 (10.7% increase in spend projected for the year)
- 2018 – \$16,108,000,000 (2.3% increase in spend projected for the year)
- 2019 – \$16,267,000,000 (1.0% increase in spend projected for the year)

2017 – 2019 Visitation Forecasts – Visits from the Rest of Canada

Visits from the rest of Canada to the province of Ontario are expected to increase over the course of this Three-Year Plan, as the Ministry projects Canadian visits to Ontario to rise by:

- 2017 – 7,228 million visits (2.3% growth projected for the year)
- 2018 – 7,318 million visits (1.2% growth projected for the year)
- 2019 – 7,403 million visits (1.2% growth projected for the year)

2017 – 2019 Total Expenditure (\$millions) Forecasts – Visits from the Rest of Canada

With modest visitation growth expected, the Ministry has projected spending by residents from the rest of Canada to experience increases over the course of this Three-Year Plan. This reflects the trend of this market segment having to travel longer distances to arrive to Ontario, and in large measure, include over-night stay, as part of their trip to Ontario:

- 2017 – \$2,518,000,000 (5.7% increase in spend projected for the year)
- 2018 – \$2,705,000,000 (7.4% increase in spend projected for the year)
- 2019 – \$2,851,000,000 (5.4% increase in spend projected for the year)

2017 – 2019 Total Overseas Visits to Ontario

In terms of the overseas market, total visitor numbers as captured by NPC's own visitor survey, remain modest in size, yet significant in terms of the revenues generated for the Commission. According to the Ministry, overseas visitation to Ontario will continue to grow by:

- 2017 – 2,651 million visits (5.7% growth projected for the year)
- 2018 – 2,733 million visits (3.1% growth projected for the year)
- 2019 – 2,813 million visits (2.9% growth projected for the year)

2017 – 2019 Total Expenditure (\$millions) Forecasts – Overseas Visits to Ontario

With continued visitation growth expected, the Ministry has projected spending by Overseas visitors to Ontario residents to experience increased growth over the course of this three-Year Business Plan:

- 2017 – \$6,364,000,000 (9.8% increase in spend projected for the year)
- 2018 – \$6,883,000,000 (8.2% increase in spend projected for the year)
- 2019 – \$7,460,000,000 (8.4% increase in spend projected for the year)

4.0 STRATEGIC DIRECTIONS

NPC's achievements in 2016-17 and focus in the 2017-2020 Business Plan support the priorities of the Ministry of Tourism, Culture and Sport through several initiatives. These include market research and brand development, response to international tourism trends, renewal of NPC's existing tourism attractions and launch of new attractions, preservation and enhancement of heritage assets and collaboration with the local community through participation in marketing partnerships.

In 2016-17 NPC continued progress on the initiatives outlined in its approved Business Plan, including the key priorities of redevelopment of Niagara Park's Marina at Miller's Creek, developing a community vision for the generating station buildings and meeting obligations under the Standards and Guidelines for the Conservation of Provincial Heritage Properties under the Ontario Heritage Act.

Progress continues on redevelopment of NPC's Marina at Miller's Creek. In 2016-17, NPC undertook an industry engagement process to engage the broader market and raise awareness of the project, to confirm risks and to help identify the most attractive business opportunity. Information from the sessions was used to develop a draft RFP for comment from industry. A final RFP is to be issued in March 2017 with a recommendation of a preferred proponent to the Commission in May 2017. To reduce uncertainty for potential proponents, NPC will conduct a Stage 2 Environmental Site Assessment on the property.

During 2015/2016, NPC approved a project charter for the redevelopment of NPC's three historic power generating buildings, which defined steps and timelines consolidating relevant information about each building, site and infrastructure, in preparation for competitive procurement processes, and redevelopment. An internal visioning process has been conducted and the feedback from this process will form the basis of industry and government vision workshops that are taking place in 2017. A strategic conservation plan was developed for the Power Plants as required under the Province's Standards and guidelines for Conservation of Provincial Heritage Properties. Public input from community stakeholders took place in March 2016. The conservation plan will provide design principles for the adaptive re-use of the structures as well as articulate the overall direction for conservation of the Power Plants. In 2017-18, NPC will finalize the baseline document with the information gathered from various studies to date and will commence the preparation of an RFP for adaptive re-use of the Power Plants. As part of its 2017-18 capital program, NPC has included stabilization works on the power plant head-gates, duct banks and tunnels, prioritized based on condition assessment reports in the AMIS database.

Strategic Plan

In April 2013, NPC's Board adopted the current Strategic Plan which referenced seven pillars of focus, including Research & Development, Human Resources, Partnerships, Facilities & Technology, Finance, Products & Services and Image. These are more fully illustrated in Table 4.1.

During 2017-18, the Commission will undertake the development of a new Strategic Plan, to develop a common vision and help establish a strategy that will outline new goals and objectives, to lead the organization forward.

2016-17 Strategic Initiatives and Achievements

Research & Development

- Completed in park surveys of visitors as part of NPC's market research
- Commenced work on a 10 year Parks Masterplan for the core park area of Queen Victoria Park (QVP) with the goal of being one of the top ten parks in the world
- Continued update and consolidation of existing studies in preparation for procurement processes to redevelop the three historic generating stations on NPC property
- Researched and procured new technology for attractions ticketing

Human Resources

- Implemented new technology for Human Resources, Payroll and Timekeeping and modernized associated workflow and transaction processing
- Conducted an employee survey to plan, manage and improve human resources transparently
- Added a new training room in Human Resources building

Partnerships

- Participated in a bi-national project with the Illumination Board to install new LED lighting, to encourage new and repeat visitation to Niagara extended visitor length of stay. The enhanced illumination of both the American and Canadian Horseshoe Falls also provides greater energy efficiency and reduces maintenance costs
- Worked closely with Winter Festival of Lights to bring new programming to fruition
- Participated with Town of Niagara-on-the-Lake and the Bicentennial Working Group to establish a War of 1812 native memorial – *Landscape of Nations* – which is situated upon the lands of NPC's Queenston Heights Park, within the earthworks of Fort Riall
- Implementation of the Chippawa Grassland Bird Habitat Management Plan

Facilities & Technology

- Completed renovations at NPC office facilities and relocated administrative staff from the leased facility at Dunn Street. Sixty-three staff moves were facilitated as a result of this change in order to bring staff teams together and improve the overall functioning of individual departments
- Extended fibre network and WiFi connectivity and extended Voice Over IP (VoIP) across NPC locations within the fibre network, consolidating phone systems and phone lines while increasing functionality
- Completed \$1.4 million in funded improvements to NPC facilities which were identified as 'critical, code compliant or imminent breakdown' in NPC's asset condition database (AMIS)
- Implemented improvements to Oakes Garden Theatre, including replacement of the pergola wall and construction of an accessible walkways and entrances
- Continued the formal process for redevelopment of NPC Marina at Miller's Creek and implemented capital improvements to facilities
- Met its commitment to the stewardship of Ontario's provincial heritage properties and its partnership in implementing Standards and Guidelines. NPC received Ministry approval of the NPC's Heritage Identification and Evaluation Process, acting under the Standards and Guidelines for Conservation of Provincial Heritage Properties (Ontario Heritage Act)
- Commenced design work for lower Table Rock facility redevelopment
- Made break-wall improvements along the Parkway in Fort Erie

Finance

- NPC is projecting to exceed its budgeted net surplus of \$3.35 million by \$5.853 million

Products and Services

- Opening of the new Falls Zip Line attraction, with accessibility improvements at Grandview Market Place including a lift to the viewing platform and Zip Line launch area
- Construction of Aerial Adventure Course at Thompson's Point, to open in Spring 2017
- Leveraged the centennial anniversary of the Whirlpool Aero Car attraction with a series of summer promotional events and programming activities and infrastructure improvements to commemorate this special milestone
- New digital and photo capture vendor program

Image

- Second year of the three-year brand development strategy to clearly define and craft an enduring brand story and identity of NPC, backed by comprehensive research, vision, and represented through a strong visual identity

Environmental Scan

Ontario's Economic and Fiscal Review in November 2016 notes that Ontario's economy remains strong benefiting from low oil prices, favourable U.S. exchange rates and solid U.S. economic growth. The global economic environment remains challenging and growth in the rest of Canada is expected to remain tepid at best. As a result, there will be a continued focus on both the U.S. and domestic traveler, primarily from the GTA/Ontario and creating value and reasons for repeat visits.

The Ontario Ministry of Tourism, Culture and Sport has forecast an overall increase in U.S. visitation to Ontario for the 2017 tourism year and beyond. American discretionary spending has accelerated resulting in an increase in visitation and spend in the Province, not only this past year but beyond.

For 2017, The Ministry is forecasting 13.8 million visits from the U.S to Ontario with approximately \$4.7 billion in expenditures by U.S residents to Ontario and 129 million Ontario visits from Ontario residents travelling with approximately \$15.7 billion in expenditures by Ontario residents travelling in Ontario. With its proximity to the U.S border, these are the largest markets impacting tourism in Niagara. As a result, there will be a continued focus on both the U.S. and domestic traveler, primarily from the GTA/Ontario and creating value and reasons for repeat visits.

In 2016-17, strategic investments in new attraction development, infrastructure renewal and a celebration and emphasis on this region's unique history, have all played a significant role in helping to generate a renewed sense of excitement and interest in Niagara and Niagara Parks.

It is critical that NPC continue to work effectively with many stakeholders and partners to protect the natural and cultural heritage along the Niagara River for the enjoyment of visitors while maintaining self-sufficiency.

2017 – 2020 Strategic Focus

NPC's 2013 Strategic Plan recognized the need for NPC to reposition itself, to refine its image, define its core business, align to its original mandate, address significant trends in tourism and to capitalize fully on its assets. The following key priorities for 2017-20 are outlined below:

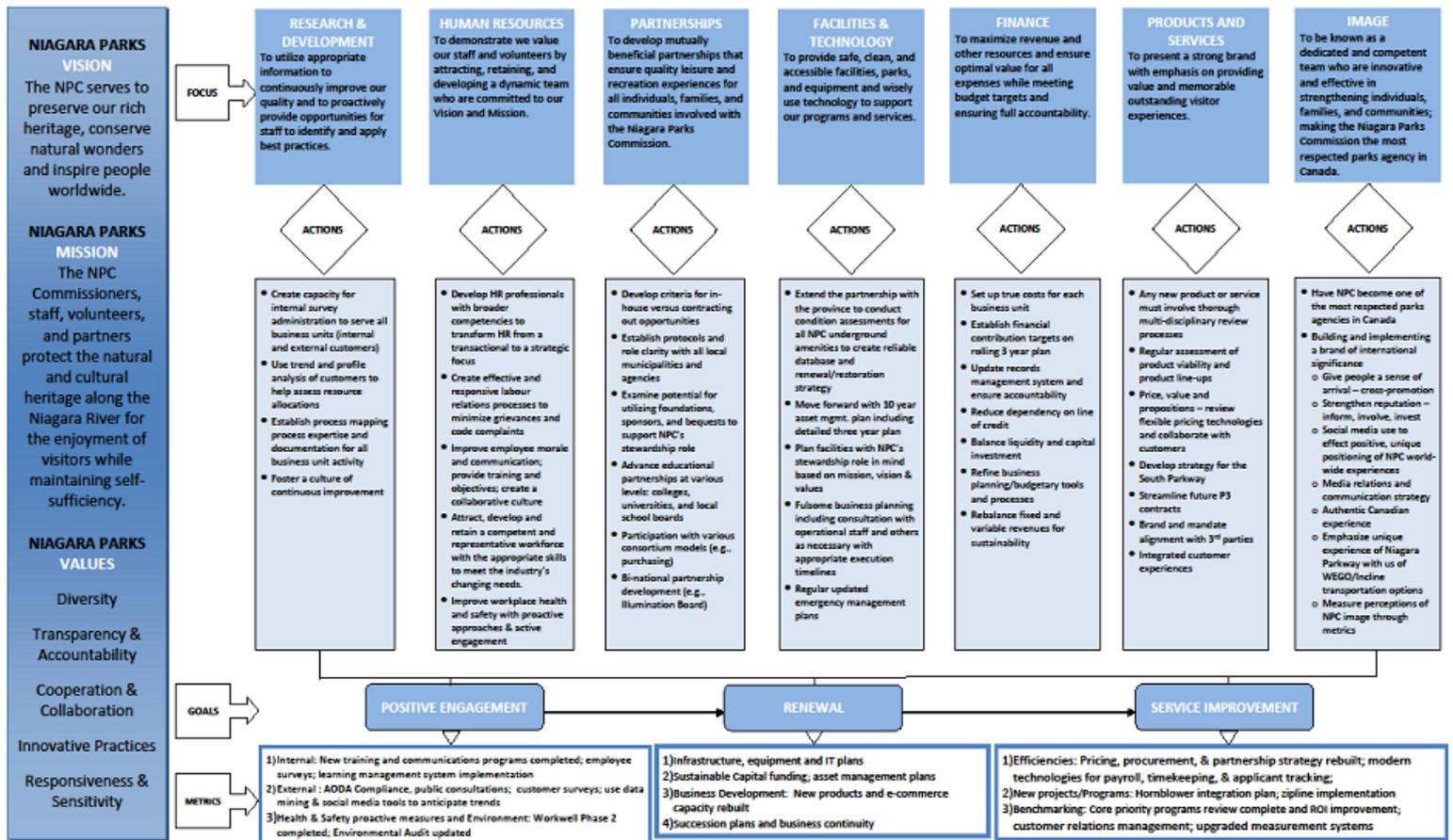
- Position NPC as a worldwide Park experience and strengthen our global identity and brand
- Grow revenue sources to \$125 million per year by 2025 to sustain operations well into the future

- Make further investments in systems, technology, infrastructure and people
- The following key projects are identified:
 - Updated Strategic Plan for NPC
 - Launch brand initiative
 - Continue with 10-year Masterplan Development in Queen Victoria Park Area
 - Procurement for redevelopment of NPC Marina at Miller's Creek
 - Complete baseline information consolidation, visioning process and redevelopment strategy for heritage power generating facilities
 - Meeting obligations under the Standards and Guidelines for the Conservation of Provincial Heritage Properties under the Ontario Heritage Act
 - Canada/Ontario 150 Programming: Rooted in the Garden
 - Attraction Renewal: Table Rock lower level
 - Forestry Management Program
 - Systems improvements
 - Payroll & Timekeeping
 - Ticketing for Attractions and Parking
 - Digital and Photo Capture Program
 - Additional WEGO in rotation (Summer)

These current and forthcoming projects and activities are more fully described in Section 5 of this Business Plan.

Table 4.1 Strategic Focus

THE NIAGARA PARKS COMMISSION
2016 – 2018 STRATEGIC FOCUS



5.0 CURRENT & FORTHCOMING ACTIVITIES & IMPLEMENTATION PLAN

The 2017 – 2020 Business Plan reflects the results of the Strategic Plan update that was approved in April 2013. The programs and activities outlined within this section are a continuation of projects underway during 2016-17 and new initiatives for the 2017–2020 planning period. This section also provides details on upcoming Revenue Generating Opportunities (RGO's) within the planning period.

Strategic Plan Development

NPC conducted a strategic planning process in 2013 and updated its Strategic Plan in April 2013.

During 2017 the Commission will undertake the development of a new Strategic Plan, to develop a common vision and help establish a strategy that will outline new goals and objectives, to lead the organization forward. This exercise will allow NPC to review its current vision, mission, mandate and values, and to determine if they truly reflect the Commission, its operations and the new course it intends to set for the future.

NPC Brand Development (to be funded within existing operating budget and conducted through the marketing division and cross departmental teams)

NPC is continuing implementation of its three-year brand development program, including the development of brand guidelines and development of a new Niagara Parks website. The objective of the project is to clearly define and craft an enduring brand story and identity of NPC, backed by comprehensive research, vision, and represented through a strong visual identity. The scope of the project extends across a 3-year period, and involves:

- Historical research and current state analyses to craft a comprehensive brand assessment;
- Interim brand policy to introduce consistency and structure to all marketing communication and brand representation;
- Engaging cross-functional, organizational stakeholders on a Brand Redevelopment taskforce;
- Brand School to introduce the objectives, scope, and end goals to those integral to the operations of NPC;
- Brand Audit, to strategically assess NPC's competitive current state;
- Brand structure development project, to define who NPC is as an organization, engaging both internal stakeholders and external audiences;
- Brand Story development, comprehensively writing NPC's story;
- Brand Visual identity reconstruction, engaging an external design agency to craft a refreshed, bold, yet timeless visual identity to be consistently expressed across all brand touchpoints;
- Redeveloped web presence project; and the
- Execution, measurement, review, and support of the project upon implementation.

Masterplan Development

NPC is undertaking a multi-year process of creating a masterplan to guide NPC park development over the long term. The first phase will focus on a conservation plan in the core area in proximity to Queen Victoria Park from Rapidsview Blvd to Oakes Garden Theatre and Rainbow Gardens.

The development of a single, coherent ten-year Master Plan for QVP will be based upon NPC's mission and mandate, as well as its goal of being one of the top ten parks in the world. The Plan will:

- Enhance protection and sustainable use of natural features
- Enhance protection and sustainable use of cultural heritage features
- Establish a policy framework for land use and programming
- Improve visitor experiences and identify programming opportunities that are compatible with preserving the natural and cultural heritage of the area
- Improve connectivity and movement throughout QVP and to the wider area by creating a multi-modal transportation structure

Niagara Parks Marina at Miller's Creek Redevelopment

The enhancement of The Niagara Parks Marina at Miller's Creek will create a regionally unique, recreation destination appropriate to its parkway and historical river setting.

During 2015-16, NPC conducted a market study to consider the full 45 + acre site which includes the Marina, Shoreline and NPC Open Space Lands in the proximity of the Marina. The study investigated marina, commercial, accommodation and residential land uses. Land lease and land ownership options were also reviewed. Development of the Marina is to be based on the following key project principles:

- Maximize water-based recreation and related amenities
- Enhance public access and activities along the Niagara River shoreline
- Conform to planning policy and regulation, and follow good planning principles
- Ensure financial sustainability and community benefit

Progress continues on the redevelopment of NPC's Marina at Miller's Creek. In 2016-17, NPC undertook an industry engagement process to engage the broader market and raise awareness of the project, to confirm risks and to help identify the most attractive business opportunity. Information from the sessions was used to develop a draft RFP for comment from industry.

During 2017-18, NPC will be conducting a two stage RFP process, based on information obtained through an industry consultation phase undertaken in 2016-17. NPC will conduct a Phase 2 Environmental Site assessment, through environmental consultants procured through competitive procurement. The two stage RFP process will commence with a draft RFP circulated for industry comment in January 2017, followed by a formal RFP process to be completed by May 2017. The process is being overseen by NPC's Fairness Consultant. Throughout the process, NPC will continue to provide daily operations and maintenance of the marina through a third party provider.

Power Plants *Adaptive* Re-use of Historical Ontario Power Generating (OPG) Assets

NPC is the custodian of three historic power generating buildings: Ontario Power Generating Station (OPGS), Canadian Niagara Power Generating Station (CNP), Toronto Power Generating Station (TPGS), as well as Ontario Power Gatehouse (OPGH). All of these facilities are over 100 years old and have historical significance, and they are no longer able to produce hydroelectricity. These three historic power generating facilities and their associated structures (gatehouse, surge tanks, weirs, tunnels and elevators), all of which are located in a significant area adjacent to Niagara Falls, may be suitable for adaptive re-use. During 2015-16, NPC approved a project

charter, which defines steps and timelines, consolidating relevant information about each building, site and infrastructure, in preparation for the procurement process.

An internal visioning process has been conducted and the feedback from this process will form the basis of industry and government vision workshops that are taking place in 2017. A draft strategic conservation plan was developed for the Power Plants as required under the Province's Standards and Guidelines for the Conservation of Provincial Heritage Properties. Public input from community stakeholders took place in March 2016. The conservation plan will provide design principles for the adaptive re-use of the structures as well as articulate the overall direction for conservation of the Power Plants.

The following next steps are in progress and continuing into 2017-18:

1. Finalize the baseline document with the information gathered from various studies to date.
2. Complete the strategic conservation plan under the Province's Standards and Guidelines for Conservation of Provincial Heritage Properties.
3. Continue with Indigenous Consultations.
4. Develop an overall communication plan to maintain consistent messaging, generate market interest in the project, reinforce consultations with Indigenous communities, as well as to keep the public informed of NPC's redevelopment efforts.
5. Conduct visioning exercises with government and industry.
6. Working in tandem with the research, data collection and report review, develop a GIS interactive platform that links generating plant components with the relevant assessment reports.
7. Competitively retain external consultants specializing in procurements of similar complexity, fairness monitoring, market research and analysis and legal/contractual support.
8. Commence the preparation of an RFP for adaptive re-use of the Power Plants.
9. Complete stabilization works on the Power Plant head gates, duct banks and tunnels, prioritized based on condition assessment reports from the AMIS database.

Implementations of next steps will ensure compliance with the Procurement Policy, the Realty Directive, and other NPC policies as applicable, as well as any required Provincial approvals.

Canada/Ontario 150 Celebrations: Rooted in the Garden

2017 marks Canada and Ontario's sesquicentennial. During 2017-18, NPC will undertake various programming and exhibits to celebrate the sesquicentennial. The programming supplements NPC's existing programming for this celebration and is funded by Provincial grant under the Ontario150 program totaling \$563k. 80% of the program will be implemented by March 2017, with the balance occurring by March 2018.

The program focuses on five key projects:

1. **Rooted in Legacy:** a total of 10 interpretive pollinator gardens, including educational signage, will be established to tell the story of birds, bees and butterflies along with other insects that are becoming species at risk. The project will advance NPC's strategy of building programming along the north and south boulevards and providing linkages to various areas of the Park.

2. **Rooted in Nature:** a new exhibit at the Butterfly Conservatory and Botanical Gardens to include access to traditional animals found in Ontario and not readily known to new Canadians. A diverse programming schedule will be created to target new Canadian families, the education market and millennials.
3. **Rooted Signature Event:** strong interactive programming that leverages and provides access to expertise at Niagara Parks, the School of Horticulture and Horticultural partner associations. It will include lectures, Indigenous gardens, a juried flower show, a fine arts show, an education summit, a tradeshow by Landscape Ontario, a plant sale, a Monarch release program and a culinary showcase of Ontario foods.
4. **Rooted in Life: Life on Display Exhibit:** a new exhibit at the Floral Showhouse will feature a whimsical outdoor art installation that interprets life in Ontario over 150 years. Repurposed using vintage pieces acquired from Durham region's former Cullen Miniature Village collection. The exhibit will feature lifelike representations of real landmarks in Ontario as well as abstract and imaginative re-interpretations of architectural detail found in Ontario.
5. **Rooted in Design Ontario Wide Art Competition:** NPC will hold an amateur and professional art competition. The amateur competition will be issued to secondary and post-secondary institutions to design the artwork for two high traffic flower beds in Queen Victoria and Queenston Heights Parks as well as the face of NPC's Floral Clock. Winning submissions will be grown and planted by NPC staff and showcased through the 2017 season. The professional competition will feature a public art installation. The winning submission will be commissioned to create the art piece for unveiling in the fall of 2017 and will become the launch of a new public art strategy being developed for NPC thus rooting new cultural exhibits within the Park for the future and providing a legacy for the Ontario 150 program.

Additional programming includes participation in Ottawa Mosaiculture, sponsorship in Canadian Garden Council and planting of special tulips, Falls illumination, unveiling of work completed at Oakes Garden Theatre, Canada Day celebrations, concert series, a Canada/Ontario themed addition to the Onguiaahra Sound and Light Show, a Heritage attraction package and lecture series.

Attraction Renewal Table Rock

This is a phased multi-year project for redevelopment of the Table Rock complex commencing in 2018. The scope of this project in 2018 is to remove the existing Welcome Centre reception area near the escalators at Table Rock and to re-position the Welcome Centre to the outer perimeter of Table Rock. The objective is twofold: it will improve the visitor experience by opening up the flow of traffic in this area and it will also address health & safety concerns for staff related to noise and congestion. In 2017-18, the entire lower level of Table Rock will be reviewed focusing on the enhancement of the visitor experience including assessment of culinary, retail and attraction operations. The review will also look at opportunities to optimize revenue generation.

Forestry Management Program

The Forestry Section is responsible for the planting, maintenance and removal of all trees on NPC property and the ongoing costs of full time and seasonal wages are incorporated in the Horticultural budget. The 2017-18 horticulture operating budget includes an increase in funding

of \$173 thousand to increase staffing of forestry operations to two full time crews including a preventative maintenance team.

The goals of the Urban Forestry Management program include:

- sustaining a healthy urban forest through use of best industry practices
- promoting better air quality
- improving storm water management
- providing shade for park visitors
- providing a high quality park setting, while working seamlessly around the millions of visitors who enjoy NPC's park each year

The NPC urban forest has evolved over the many decades as trees age, decline and ultimately die. Most areas of NPC lands, including Queen Victoria Park and Queenston Heights Parks are populated with very large mature, or over mature trees inter-planted with smaller trees to replace ones lost to age or damage. These large trees anchor the landscape, providing the backdrop to the area and deliver NPC's guests shade and dramatic visual photo opportunities.

Through time as the forest changes, maintenance requirements also change. More time is spent at each larger tree monitoring, pruning, and removing dead wood. Larger trees mean more potential for structural failure and greater damage when failure finally does occur. Although there is no way to fully remove risk with trees, proper maintenance is essential to mitigate the risk as much as possible. In addition to the natural aging process, the recent infestation of the Emerald Ash Borer (EAB), has created additional maintenance demands over the last few years that is expected to continue for 4 to 5 years.

The NPC is undertaking an inventory of all urban trees within its lands. This inventory is expected to provide a better understanding of NPC's urban forest's health and diversity, provide information vital to future planning and assist in identifying trees of concern.

Work on the inventory started with the Centennial Lilac Garden, with all the trees catalogued on GIS for Genus, Species and cultivar as well as condition. This work is expanding into Central Parks this fall for all trees within turf areas and will include more detailed information on health and hazard potential using the International Society of Arboriculture methodology. The project will continue to expand throughout the entire park lands focusing on major parks first and then shifting focus to the boulevards. The inventory should reach a substantial completion over the next three years. The tree condition assessment provides a key resource for prioritizing maintenance. The implementation of the NPC Urban Forest Standards is outlined in the NPC Parks Maintenance Manual. The ability to operate both a removal team and a maintenance team allows NPC to transition from a place of reactionary management, to one of planned maintenance. NPC's GIS technology is allowing more accurate tracking of removed trees, aiding in the locate process for stump removal and events planning. Precise cataloging of NPC's current forestry assets will allow a better understanding of forest value and will provide a tool to assist in future development of NPC lands.

Business Rationalization–Finance, Procurement, Human Resources and Technology and WEGO Improvements (through Administrative Operating Budgets; Ticketing technology: \$1.2 million in 2017 & 2018 capital budgets)

During 2017-2018, NPC will continue with the modernization of its technology and Corporate Services support systems as well as the introduction of a Corporate-wide records management initiative. Modernization projects will continue in the areas of Technology, Procurement, Financial Reporting & Budgeting and Revenue Collection, including the Payment Card Industry Data Security Standard (PCI DSS) Compliance, Payroll and timekeeping services & Human Resources data management.

The modernization process involves documentation of existing systems in a standard format, user friendly forms, gap analysis, development of work plans, staff training, introduction of new or upgraded technologies and new records management processes. The majority of the modernization program is funded with existing staff, and through the additional capacity provided by ongoing efficiencies.

NPC has procured a Software as a Service (SaaS) arrangement with for payroll, timekeeping and Human Resources Information Services, and will be implementing the new technology over a six-month period, with a targeted completion date of Spring 2017.

NPC's work on establishing a formal records management program continues. During 2017, NPC will continue with the inventory, classification and retention processes for a formal records program, develop appropriate records storage and investigate options for new technology for document management.

NPC currently utilizes six different software suites to manage its retail, attraction, culinary, golf, group booking and revenue consolidation activities. NPC has procured a new ticketing software which is to be implemented by April 2017. The software provides options for an integrated Point of Sale for NPC's other businesses, with Customer Relationship Management tools that will meet NPC's operational needs.

NPC is improving its visitor transportation capabilities, with an additional WEGO shuttle planned for the 2017 season, serving the Green Line during the summer high-volume periods.

Revenue Generating Opportunities Plan – Upcoming Renewals

NPC has several RGO's that are provided by third parties. RGO's provided by third parties are established through a competitive procurement process. NPC's 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 NPC should continue to use a third party to operate the RGO, or to undertake providing the service directly.

6.0 RESOURCES NEEDED TO MEET GOALS AND OBJECTIVES

NPC has implemented a streamlined management structure (See Section 7.0 Human Resources). The structure is designed to assure greater accountability and build more capacity within the organization to manage specific service areas as well as better manage third party relationships and the hundreds of external contracts each year.

Financial and human resource requirements for the priority projects identified in Section 5.0 of this Business Plan are being achieved within the existing staff complement, budget and partnerships, with the exception of additional funding required for the implementation of improvements to the adaptive Re-use of Historical Ontario Power Generating (OPG) Assets. The cost estimate to address/remediate above ground deficiencies to these three facilities was recently estimated in the AMIS report to be approximately \$27.6 million. These cost estimates, as well as estimates for underground capital repairs will require external funding. For 2017-18, NPC is seeking in \$1.265 million in additional Provincial capital funding (in addition to the notional allocation of \$2.65 million), representing 50% of the estimated cost to stabilize the OPG tunnels and CNP head-gates to prevent further deterioration. NPC will fund the remaining 50% from its 2017-18 operations.

Infrastructure Renewal

One of NPC's most pressing challenges is to effectively manage the balance required in its preservation and economic development roles. The need to invest in infrastructure was highlighted by the Provincial Government in its Tourism Competitiveness Report published in 2009 (The Sorbara Report). Recommendation 13 of the Report calls on Government to ensure: *"Anchor attractions that help drive business in the surrounding area should be a funding priority for future tourism infrastructure investment. A number of issues need to be addressed including: overdue need for state-of-good-repair improvements, lack of new construction, increased maintenance costs, dated and aging attractions, limited partnerships and lack of appeal to broad demographic groups."* Further, the Report concluded that NPC was among the top five Ontario public products that had the potential to increase their tourism product offerings and economic activity. Management has conducted a full inventory of facility assets as part of a provincially funded initiative. The current cost estimate to address deficiencies is approximately \$168.123 million, including the \$27.588 million amount for Power Plant facilities (see Table 10.5). Funding for capital investment is generated from the 2018 operating budget (\$11.513 million and Ministry grant (\$2.56 million). This provincial grant funding is subject to approval.

7.0 HUMAN RESOURCES

Strategic Plan

Human Resources is one of the seven pillars of NPC's strategic plan. The focus of Human Resources is to demonstrate that we value our staff and volunteers by attracting, retaining and developing a dynamic team who are committed to NPC's Vision and Mission. This is achieved through the following:

1. Providing a Human Resources business and service model which supports the strategic direction of the organization
2. Creating effective and responsive labour relations processes to build and maintain positive morale
3. Providing appropriate training and upskilling opportunities
4. Attracting, developing and retaining a competent and representative workforce with the appropriate skills and total rewards to meet the industry's changing needs
5. Improving workplace health and safety and meeting all legislative requirements
6. Facilitating a corporate culture of teamwork and collaboration

NPC has demonstrated these principles through various corporate initiatives in 2016 and will deliver further initiatives throughout the business planning period to meet the needs of the organization and the objectives of the strategic plan.

Workforce

NPC has a total workforce complement of 1,676 employees comprised of 309 full time positions and up to 1,367 seasonal positions. With part-time staff included, the FTE count was approximately 925 positions within the approved complement. This is a slight increase over the previous year.

Service Delivery and Modernization

In 2016, NPC continued to strengthen its Human Resources function and client service delivery, focusing on the continued modernization and efficiency of Human Resources programs and processes. NPC completed the installation and implementation of a new Applicant Tracking System (ATS) through Monster Canada to eliminate paper application forms and transition all recruitment to an on-line platform.

In addition, NPC launched a new Learning Management System for full time staff through Auxillium Canada to facilitate on-line learning and to create a more effective tracking and reporting mechanism to ensure training due diligence. The launch for seasonal staff will take place in 2017.

NPC is currently in the process of implementing a new Payroll/Time and Attendance/Human Resources system through ADP Canada which will eliminate antiquated paper time keeping systems, facilitate employee self-service and improve reporting. This system is scheduled to go live in early 2017.

In addition to the vendors listed above, through competitive procurement processes, NPC has procured a number of Vendors of Record to provide additional expertise and enhance the existing service delivery model provided internally by the Human Resources department. Vendors of

Record have been secured in the areas of Accessibility Consulting, Labour Law, External Recruitment, Employee Survey delivery, Outplacement, Medical Services, Employee Assistance Program, First Aid/CPR/AED training, Temporary Employee Services and Employment Testing. In response to the requirements of the Sexual Violence and Harassment Action Plan Act NPC is also procuring a firm to provide Independent External Investigations as required.

In 2016, NPC relocated its Human Resources offices from a rented facility to a renovated property on NPC lands in order to improve service delivery and make the Human Resources office more accessible to employees.

Labour Relations

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

NPC held a number of employee events in 2016 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, Employee Picnic and a United Way week where each day, a different department planned and implemented an event for staff. NPC continued to recognize employee achievement through its Employee Awards program which promotes the nomination of employees by fellow employees for awards in the following 5 categories: Customer Service, Innovative Business Solutions, Leadership and Empowerment, Team Spirit and Community Partnerships. In addition, NPC has a "Chair's Award of Excellence" which is presented to the individual who exhibits exceptional performance in several of the individual award categories. Individual events were also held within each department to recognize those employees who have reached the milestones of 25, 30, 35 and 40 years of service with the NPC.

NPC conducted an employee survey in 2016 as a follow-up to the survey conducted in 2013. Through departmental action plans, over 100 improvements were made flowing from the responses received in 2013. The 2016 survey has been designed to make direct comparisons to the results of the 2013 survey to determine where NPC has improved, stayed the same or where additional improvement is needed. To facilitate the survey process, a Steering Committee was established comprised of both union and non-union staff to assist in designing the survey process. In addition, department Ambassador teams were created to promote the survey and answer employee questions and concerns. Survey results were provided to senior management and the Board in September. Meetings were also held with all managers and staff in October to share results. Results demonstrated an overall improvement in many of the survey categories as compared to 2013. A process is now underway to communicate survey results to all staff and establish departmental/location teams to identify specific issues and develop action plans in order to build on identified strengths and address any areas of concern.

NPC has positive relationships with all three of its unions. OPSEU elected a new Union Executive in 2016 and the parties have met to discuss how to build on positive employee relations over the next term. NPC has approximately 30 outstanding grievances which the parties have reviewed and have established a process of mediation in early 2017 in an attempt to resolve these matters. NPC Executive staff continues to meet with the Union Executives on a quarterly basis for the process of information sharing and to address any outstanding issues. In 2017, NPC will be negotiating a renewal collective agreement with OPSEU, Local 217, Park Employees which represents approximately 585 members.

NPC held two Town Hall meetings in 2016 to connect with all staff, to review NPC's vision and plans for the upcoming season and to review NPC performance. These sessions also provide a forum for employees to address various issues of importance to them and allows for personal interaction with the Executive Team and Commission Chair.

In 2016, NPC continued to participate as a member of the Agencies Forum which brings together the senior Human Resources staff from Agencies, Boards and Commissions across the Ontario Public Service to share information, discuss labour trends/strategies and to work together toward consistent delivery of Human Resources services across provincial sectors. The work of the team in 2016 included discussions related to negotiations trends, grievance trends, employment legislative changes, benefit comparison and collaboration on the Provincial post-retirement benefit strategy.

Employee Learning and Development

Training continued to be a priority for the Commission in 2016 as there were 1106 registrations for a variety of programs. This included 934 registrations for internal courses such as First Aid/CPR/AED, Mental Health First Aid, equipment training, Health and Safety Certification, Parts 1 and 2, WHMIS and Traffic Control. In addition, NPC supported 120 registrations for professional seminars and conferences and 52 registrations for leadership development training through Brock University. This training covered the following topics: Personality Dimensions, Embracing the Leadership Challenge, Team Work-The New Competitive Advantage, Performance Management, and Building Action Plans to Support Ongoing Development. Additional supervisory training is scheduled for 2017 to include such topics as Strategy, Visioning and Change Management. Licenses were also purchased for Lynda.com to provide a wide variety of on-line training resources and self-paced learning modules.

In 2016, Human Resources created a new Employee Orientation Program to introduce staff to the organization and to outline a variety of policy and legislative requirements that employees need to be aware of. This orientation program is also designed to be used as refresher information for existing staff as it relates to topics such as Human Rights, Harassment and Violence, AODA, etc. NPC uses the Ministry videos for Worker and Supervisor Safety and WHMIS. The Learning Management system will be used to facilitate this training and other training that departments may require.

Talent Acquisition

In 2016, NPC developed and implemented a streamlined process through the new Applicant Tracking System for full time recruitments in order to realize greater efficiencies. Human Resources staff coordinated 69 posted job competitions for full time, temporary and apprenticeship positions. A significant number of the 2016 recruitments were the result of over 30 retirements, some of which stemmed from the changes announced by the government with respect to post-retirement benefits, i.e. those retiring after November 30, 2016 would be subject to one-half of the post-retirement benefits cost going forward.

The vast majority of NPC's hiring each year is for seasonal positions to meet visitor needs during the spring and summer peak periods. NPC's 1367 seasonal staff are comprised of 721 students, 18 Apprentices and 628 non-student staff. Of the total seasonal complement, 401 were new employees to the NPC in 2016, which is indicative of the economic impact that the organization has on the local community.

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

Due to the number of anticipated retirements over the next several years, NPC's Executive Team and Human Resources are working on 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 have renewal and fresh perspectives in addition to developing internal talent.

Compensation Strategy

NPC's compensation strategy is to be a competitive employer which offers fair wages, salaries and benefits in relation to the comparative market. NPC positions are benchmarked against the Southern Ontario market outside of the Greater Toronto Area. In addition, NPC benchmarks its salary structure at the fiftieth (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 to recognize increased responsibility.

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

NPC offers a benefit package to its full time and significant contract staff similar to that of other Ontario Public Service employees. Seasonal unionized staff receive a payment in lieu of benefits as negotiated between the parties.

NPC staff, with the exception of students, are also eligible to participate in one of the pension plans offered through the Ontario Pension Board and OPSEU Pension Trust.

NPC will be focusing attention in 2017 to the development of an Executive Compensation Plan in accordance with the requirements of the Broader Public Sector Executive Compensation Act.

Health and Safety Plan

A major focus for the Niagara Parks Commission in 2016 was the Safety Group Advantage Program (SGAP). This Program is a Workplace Safety and Insurance Board (WSIB) initiative designed to support an organization's Health and Safety Management System and provide an organization the opportunity to achieve WSIB rebates. A requirement of SGAP is to conduct a comprehensive safety audit on an annual basis and this audit was conducted by the Workplace Safety and Prevention Services in June. The audit provided a list of recommendations and as a result, the Niagara Parks Commission's internal SGAP team has developed a plan for continuous improvement.

Another key accomplishment for 2016 was the development and delivery of Safety Training for the Vendor of Record (VOR) contractors. A total of 20 VOR contractors took part in classroom training and subsequently trained 225 of their employees in the program. The Health, Safety and Environment department conducted 117 safety audits of contractors throughout the year with 10 minor issues identified and corrected.

A complete review and redesign of the confined space program was another major accomplishment at the Niagara Parks Commission in 2016. A total of 43 spaces were assessed to ensure that all requirements were met.

A number of health and safety standards were reviewed and approved by the SGAP and Executive Management Team. Internal training courses were developed and facilitated to key employees on topics such as Hearing Protection, Asbestos Awareness and Hazardous Energy Control.

The Ministry of Labour made 4 site visits to NPC during the summer months. The visits were in response to a workplace injury, a response to a complaint, and two visits in response to a recent change in legislation. Orders have been complied with and approved by the Ministry of Labour. One order related to extended training and a plan has been developed to deliver the program.

Fire Safety Plans for 28 sites were developed and approximately 300 staff were trained on the use of fire extinguishers.

In addition, NPC engaged members of the Joint Health and Safety Committee to implement the Sexual Violence and Harassment Action Plan Act related to harassment and violence in the workplace. NPC used the Ministry of Labour's Code of Practice to establish a program of clear processes and procedures for managers and staff to follow in the event of a complaint.

Key Human Resources/Health and Safety Priorities and Actions

2017

Technology

- Full implementation of the new Payroll/Time and Attendance system. Support new users of the system
- Commence implementation of Employee Self-Service within ADP
- Debrief on first year use of the Applicant Tracking System and make any adjustments to improve ease of use and efficiency for applicants and managers
- Implement the new Learning Management System for seasonal staff and support users of the new system
- Document HR processes in light of technology changes

Learning and Development

- Work with NPC's AODA Consultant to develop and release new and updated modules on the AODA Standards for the Learning Management System
- Improve tracking of training and develop reports through the Learning Management System
- Implement next phase of Supervisory training program to include topics such as Strategy, Visioning and Planning, Finance, Change Management, Emotional Intelligence and High Performing Teams

Performance Management/Succession Planning

- Development of a renewed Performance Management program and a renewed performance appraisal strategy
- Development of a new succession planning model and toolkit for expected vacancies
- Implement improved exit interview and off-boarding process

Employee/Labour Relations

- Review and mediate outstanding grievances
- Complete contract negotiations with OPSEU, Local 217-Park Employees
- Work with departments to develop and implement employee survey action planning process

- Implement Employee ID program

Compensation

- Develop Executive Compensation Plan in accordance with the requirements of the Broader Public Sector Executive Compensation Act

Health, Safety and Wellness

- Enhance EAP reporting, analytics and trending
- Complete procurement RFP Process for NPC Employee Assistance Program
- Prepare for the 2017 SGAP audit and continue to address recommendations from both the 2015 and 2016 audits to ensure continuous improvement of NPC's health, safety and environmental programs and processes
- Each site will conduct a preliminary hazard assessment with a team of both union and non-union staff members to review potential hazards and assist in the prioritization of control measures
- Develop Fire Safety Plans for sites that have not yet been completed and additional training for staff on both the fire safety plans and fire extinguishers
- Develop and roll out Health and Safety Supervisor Handbook to be used as a reference for all supervisory or managerial staff

2018-2020

Technology

- Implement Document Management module of ADP in cooperation with NPC's Records Management Strategy
- Update employee website; create ability to build/store resources online

Learning and Development

- Research and provide additional training and upskilling options (i.e. Collective Agreement, performance management, coaching, time management)
- Ensure continual cross-training of HR staff to create capacity and capability in other functional areas for appropriate assistance to departments
- Develop a Human Resources Manual for Managers
- Introduce renewed on-line employee handbook

Employee/Labour Relations

- Establish formal mentoring program
- Complete contract negotiations with Workers United Canada Council, Local 2347 (2018)
- Complete contract negotiations with OPSEU, Local 217-Park Police (2019)
- Utilize on-line survey tool for key HR issues as required (e.g. exit interviews, pulse surveys)
- Review/Refresh employee recognition programs
- Develop Attendance Management program

Health, Safety and Wellness

- Create a formalized disability management program
- Develop corporate wellness program
- Complete the key training requirements for each employee at NPC depending on job title and the level of risk
- Continuation of Hazard assessments for each site, along with the development of specific safe work procedures for each job and task
- Develop each member of the workplace Joint Health and Safety Committees, by offering both internal and external safety training opportunities

8.0 PERFORMANCE MEASURES

Following are Key Performance Measures that NPC uses in its operations to assess performance.

Finance

In its operating budget for the year ended March 31, 2017, NPC projects a positive variance of \$5.976 million from the budgeted net surplus from operations of \$3.350 million, resulting in a net surplus from operations of \$9.326 million for the year, which will be used to fund strategic initiatives and address capital deficiencies. Further details are provided in Section 10.

Contribution from Revenue Producing Operations

For the year ended March 31, 2017, NPC is projecting a contribution from Revenue Producing Operations (RPO) of \$29.725 million, versus budget of \$24.036 million, a favourable variance of \$5.689 million. For the 2018 Budget, NPC has established a target contribution of \$30.687 million from RPO's, based on 2016-17 performance, a review of three year averages, new contracts and forward bookings. For the year ended March 31, 2017, NPC is projected to increase its contribution from RPO's from the prior year by \$3.576 million.

Attendance

The 2016-17 budget was prepared based on attendance patterns similar to the 2015 season. Attendance has exceeded the prior year in attractions, the boat tour, golf as well as WEGO and the Incline. The budget for the new Falls Zip Line is expected to be achieved for 2016-17. Attendance statistics are an important KPI for NPC, and a comparative listing of Attendance since fiscal 2013 is contained in Appendix B. The Board reviews attendance statistics on a monthly basis. For the 2018 budget, NPC is projecting a similar level of attendance as achieved in fiscal 2017.

Customer Survey

Customer Surveys were conducted in 2013, 2014, 2015 and 2016 to gather relevant customer feedback and to assess satisfaction with their experiences at Niagara Parks. Table 8.2 below summarizes key data from the Customer Survey:

	2016	2015	2014	2013
Average party size	4.1	3.6	3.6	3.77
% of respondents from the US	62.6%	48.8%	36.7%	51.2%
Respondents who stayed overnight in the Niagara Region	72.2%	73.7%	64.5%	76%
% of day trippers who stayed 4 hours or more during their visit	93.5%	91.2%	89.2%	81%
Respondents who purchased an Adventure Pass	54.1%	32%	30%	36%

Questions to assess NPC brand awareness were posed in the survey, and responses indicate that 40% of respondents were familiar with Niagara Parks, down from 48% in the prior year (2014: 15%). 93% of respondents were very likely to recommend Niagara Parks to friends and family (2015: 97%). NPC is targeting a similar or higher response for fiscal 2018.

Human Resources – A Quarterly report of dashboard indicators is provided to NPC’s Governance, Ethics and Human Resources (GEHR) Committee. These measures, reported for the operational period January 1 to October 31 include:

Appraisal Return Rates (Evaluations Completed)

Target: 100% by deadline established by management

Results: Seasonal return rate by deadline: Oct 2016: 85% Oct 2015: 69%;
 Seasonal appraisals are completed prior to seasonal layoff.
 Full time return rate: 100%: this rate has been achieved for the current and prior year.

Health & Safety Improvement over 2016 measures:

Targets: Health & Safety staff training, reduce First Aids, Medical Aids and Lost Time Incidents.

Results:

Table 8.3 Health & Safety			
	2016	2015	2014
First Aids	228	229	250
Medical Aids	36	37	32
Lost Time Incidents	11	13	14
Lost Time Days	24	28	191

Sick Leave

Target: Improve average sick days from 2015.

Results: 2016 average sick days 5.28 days per person compared to 2015 average of 6.09 days per person. NPC met the 2016 target, sick leave for NPC is trending below other public sector organizations which average 8 – 12 days annually.

Employee Learning and Development

In 2016 there were 1,106 registrations for a variety of programs. This included 934 registrations for internal courses such as NPC Orientation, legislative and policy training (e.g. Code of Conduct, Human Rights, Violence/Harassment, Duty to Accommodate), Safety training such as Fire Extinguisher, Locates, Loader and Tractor, Forklift, Fall Arrest, Aerial Work Platform, Transportation of Dangerous Goods, and Safety Certification Parts 1&2. In addition, NPC supported 120 registrations for professional seminars and conferences, and 52 registrations for leadership development training through Brock University.

For 2017-18, NPC is targeting similar or improved statistics over the 2016-17 results.

Asset Condition

Table 8.4 NPC's Depreciable Assets as at March 31, 2016				
<i>(thousands)</i>	Buildings & Structures	Equipment	Vehicles	Total
Historical Cost	\$233,117	\$42,496	\$4,086	\$279,699
Useful Life	7 – 40 years	3-10 years	10-12 years	
Annual Amortization Charge	\$6,964	\$1,360	\$35	\$8,359
Net Book Value	\$118,341	\$4,297	\$975	\$123,613
Net Book Value as a Percentage of cost	51%	10%	24%	

Many of NPC's assets are fully depreciated and still in use beyond their expected useful life – they have \$0 book value. As part of the Asset Management Plan, NPC will develop an Asset Replacement Strategy to improve the average age of its assets.

9.0 RISK IDENTIFICATION ASSESSMENT AND MITIGATION STRATEGIES

NPC provides updates on risks to the GEHR Committee, NPC Board and the Ministry of Tourism, Culture & Sport. The risk categories are the same as what the Ministry is required to report on to Treasury Board/Management Board of Cabinet (Strategic, Accountability/Governance, Operational, Workforce, Information Technology & Infrastructure, Other).

NPC has a professional internal auditor who reports directly to the Finance and Audit Committee of the Board. The Board has approved governing policies for Enterprise Risk Management and Internal Control. Regular risk assessments and reporting to the Board are part of the internal audit program.

10.0 FINANCIAL BUDGET AND STAFFING

NPC is expected to be a self-sustaining board-governed provincial agency. NPC generates revenues from a variety of operations. The largest source of revenue earned is from the Commission's commercial activities. For the year ended March 31, 2017 this source is projected to generate approximately \$98 million or 93% of total revenues. The remaining \$7.6 million or 7% is generated from water/land rentals, fees and sundries.

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

Staffing - Summary of Staff Complement

NPC employs approximately 309 full-time and 1,367 seasonal, part-time and student staff (when converting seasonal and part-time hours, this is a full-time equivalent of approximately 925 positions) during the 2016 peak season. There are 669 unionized employees, 721 students, 88 part-time contract and 18 apprentice staff. Of the unionized staff, OPSEU represents 571 Park and Police employees and Workers United Canada Council represents 98 restaurant servers. This staffing complement is expected to remain relatively constant during the planning period.

Seasonal staff members are traditionally employed during the peak season of May through October. A limited number of seasonal staff then continue employment during the off-peak seasons, to assist at high volume sites and during major community events held on NPC property.

Overall staffing levels have increased slightly in fiscal 2016-17 over fiscal 2015-16. While NPC continues to reorganize to ensure optimal efficiencies, NPC is not planning for significant increases or decreases in its overall staff levels over the next three years.

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

Summary of 2016-17 Results, 2017-18 Approved Budget and 2019-20 Forecasted Results

In its operating budget for the year ended March 31, 2017, NPC projects a positive variance of \$5.853 million from the budgeted net surplus from operations of \$3.350 million, resulting in a net surplus of \$9.203 million for the year. This is primarily due to an increased net contribution (revenues less direct expenses) from Revenue Producing Operations of \$5.689 million, which is a 24% favourable variance over budget. The revenue from operations is used by NPC to address strategic initiatives and capital deficiencies identified in its Asset Management Plan. NPC is undertaking \$10.955 million in capital works for the year ended March 31, 2017, in accordance with its approved budget.

The 2018 operating budget has been prepared on the basis that the economic outlook impacting Ontario tourism in the upcoming year will be similar to that experienced in the current year. NPC's revenues are sensitive to economic risk factors, including changes in exchange rates, interest rates, 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. NPC monitors

expenditures on a monthly basis and adjusts operating and capital expenditures in line with actual revenue experience.

Highlights of the projected financial results for NPC for the year ended March 31, 2017, the Board-approved budget for 2017-18, and a forecast of the following two years 2019 – 2020 are included in Table 10.1 below.

<i>(thousands)</i>	CURRENT FISCAL YEAR			FUTURE YEARS		
			VARIANCE	BUDGET		
	BUDGET	PROJECTION	TO BUDGET			
	Apr. 2016 Mar. 2017	Apr. 2016 Mar. 2017	Apr. 2016 Mar. 2017	Apr. 2017 Mar.2018	Apr. 2018 Mar.2019	Apr. 2019 Mar.2020
Total Revenue	\$ 95,401	\$ 105,637	\$ 10,236	\$ 109,617	\$ 111,545	\$ 112,859
Total Expenses	\$ 82,471	\$ 86,821	\$ 4,350	\$ 90,202	\$ 91,700	\$ 92,870
Net Surplus Before Interest & Depreciation	\$ 12,930	\$ 18,816	\$ 5,886	\$ 19,415	\$ 19,845	\$ 19,989
Loan Interest	\$ 1,513	\$ 1,473	\$ (40)	\$ 1,393	\$ 1,332	\$ 1,277
Amortization of tangible capital assets	\$ 9,032	\$ 9,032	\$ -	\$ 9,183	\$ 9,400	\$ 9,500
Amortization of deferred capital funding	\$ (1,670)	\$ (1,597)	\$ 73	\$ (1,532)	\$ (1,562)	\$ (1,593)
Net increase in Power Plant Obligation	\$ 705	\$ 705	\$ -	\$ 705	\$ 705	\$ 705
Net surplus	\$ 3,350	\$ 9,203	\$ 5,853	\$ 9,666	\$ 9,970	\$ 10,100

A significant contribution to NPC's 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. The budget for the year ending March 2020 reflects the expected lease revenue from base rent plus variable rent based on estimated attendance of approximately 2.2 million passengers (2016-17 actual: 2.2 million passengers).

In addition, the projected results and budgets include revenues from NPC's lease with Niagara Adventure Excursions Inc. (NAE) for the Falls Zip Line, which opened in July 2016. Revenues from the lease with NAE are projected to meet the budget of \$1.292 million in fiscal 2016-17 as well as the original forecasted amount for 2018, which will be the first full year of operations for both the Zip Line and Aerial Adventure Course.

April 1, 2016 to March 31, 2017

The most significant impact to revenue producing operations in the current year has been the value of U.S currency in comparison to the Canadian dollar and favourable weather for most of the season. Favourable exchange rates were the main contributor to the financial results, resulting in a significant increase in American tourists, as well as retention of Canadian tourists.

The traditional Adventure Pass (4 attractions plus transportation) was supplemented by a new package option in 2015, the Adventure Pass Plus with 4 additional attractions, for an additional \$25 per pass, and the Adventure Pass Plus option proved to remain a very popular product in fiscal 2016-17. Pass sales increased by 6% from 282,000 passes in fiscal 2015-16 to 299,000 passes in fiscal 2016-17. An early opening of the Boat Tour (April 1) and favourable weather from early April, throughout the peak season and into November, contributed to the results in revenues.

In 2016-17, NPC has received an Ontario150 operating grant to supplement programming for Canada and Ontario's sesquicentennial celebrations. The grant of \$563,000 is to be spent on programming in fiscal 2017 (\$461 thousand) and fiscal 2018 (\$102 thousand).

The forecast includes revenues from the start-up of NPC's new Zip Line Attractions which opened in July 2016. The Zip Line Program, installed and operated through a third party, NAE, is a new venture that was approved by the Board, with the lease agreement finalized in November 2015. The Aerial Adventure Course is an additional attraction to be operated by NAE at NPC's Thompson Point location, and is scheduled to open in Spring 2017.

April 1, 2017 – March 31, 2018 Budget

The forecast for 2018 - 2020 reflects a positive trend with revenues at a level which are expected to cover all costs, including depreciation and amortization of power plants and provide funding for capital asset renewal. NPC receives only capital grants from the Province of Ontario. No operating grants are received from the Province for ongoing operations. From time to time NPC receives grants to supplement programming such as the Ontario150 grant for sesquicentennial celebrations. The fiscal 2018 Operating budget reflected in Table 10.1 above, provides earnings before interest, depreciation/amortization of \$19.415 million. This revenue level will permit NPC to undertake a number of crucial repairs, upgrades to its facilities and operational activities that have been deferred due to lack of funding. Scheduling of capital works improvements includes contingency planning should revenues not reach expected levels. Achievement of a positive financial position is one of the objectives identified in NPC's 2013-2017 Strategic Plan.

Assumptions

The following assumptions were used in preparing the forecast:

- The forecasts are based on revenues and attendance at similar levels to 2016-17 for Attractions, Retail and Parking and with reference to the three-year average (2014-16) for culinary operations.
- The increase in boat tour revenues each year are based on the boat tour lease arrangement with Hornblower. These revenues are subject to a minimum rent guarantee.
- Adventure pass sales are presumed to increase by approximately 2% over 2016-17 operating season (306,000 passes).
- Revenues include projected new revenues from the phasing of the Zip Line at the Falls and the Aerial Adventure Course at Thompson's Point.
- Revenues earned from Attractions are based on prices approved at the October 2016 Commission meeting.
- Revenue operations reflect recently negotiated third party agreements as identified in Section 7 of this Business Plan.
- Retail revenues are assumed to include a similar operating season (April – November) and extended hours at the Grand View Boat Tour plaza, as well as merchandise and fixture changes at Table Rock and Victoria Park retail outlets.
- Parking fare and licensing revenues reflect the implementation of a new parking strategy, including a new solar parking contract.
- The budget reflects the use of ambassadors to enhance visitor experience.
- The CEO's office includes the new Chief Operating Officer position, and funding for several strategic initiatives, including development of the Niagara Parks Marina at Miller's Creek, continued work on Adaptive Re-use of the Power Plants, development of a new Strategic

Plan in Spring 2017, and hosting of the American Parks and Gardens Association Conference in 2017.

- NPC will be continuing the preparation of a Master Plan in the Core Area in the vicinity of Queen Victoria Park, Grandview and Table Rock at an estimated cost of \$150 thousand in 2017-18. This project is estimated to take three years, and was commenced in fiscal 2017, with a projected cost of \$67 thousand in 2016-17.
- Salary & Wage assumptions include a 2.5% increase from the OPSEU Collective Bargaining Agreement effective November 2016, legislated increases to minimum wage, and contingency allowance for potential non-union cost of living increases along with changes which may result from the job re-evaluation project.
- General rate of inflation at 2% for expenditures, except where prices are fixed by existing contracts.
- Utilities changes: hydro 8% increase; natural gas 2% increase.
- Insurance premiums reflect an increase (\$75 thousand) based on estimates from NPC's broker.

2017-18 Capital Works Plan

Specific capital works to be completed in the 2017-18 fiscal year by funding source are identified in Table 10.2 below. Please note that Provincial grants for AMIS and Power Plants require approval by the Ministry/Province

TABLE 10.2 2017/2018 CAPITAL PLAN BY FUNDING SOURCE							
<i>(thousands)</i>	NPC Operations	Provincial Grant (AMIS)	Power Plant projects (AMIS)	Total \$	# of Projects from Operations	# of AMIS Grant projects	Total # of Projects
Fleet & Heavy Equipment	\$ 1,098			\$ 1,098	2		2
Equipment	\$ 1,557			\$ 1,557	32		32
Facility Upgrades	\$ 3,216	\$ 275		\$ 3,491	47	3	50
Information Technology	\$ 988			\$ 988	6		6
Electrical	\$ 185	\$ -		\$ 185	4		4
Roads, Bridges, Paths, Sidewalks	\$ 760	\$ 1,400		\$ 2,160	5	4	9
Park Development	\$ 220	\$ 310		\$ 530	4	2	6
Fort Erie Breakwall	\$ -	\$ 250		\$ 250		1	1
Subtotal Life Cycle Capital Replacement	\$ 8,023	\$ 2,235	\$ -	\$ 10,258	100	10	110
Strategic Investments							
Business Devel. Ticketing Technology	\$ 615			\$ 615	1		1
Floral Show House Redevelopment	\$ 50			\$ 50	1		1
Fort Erie Marina Upgrades	\$ 150	\$ 75		\$ 225	1	1	2
Oakes Garden Theatre		\$ 100		\$ 100		1	1
QVP MasterPlan	\$ 1,150			\$ 1,150			
Lower Table Rock Redevelopment	\$ 3,000			\$ 3,000	1		1
Wayfinding Signage	\$ 150			\$ 150	1		1
Subtotal Strategic Investments	\$ 5,115	\$ 175	\$ -	\$ 5,290	5	2	7
<i>Contingent based on Funding Availability:</i>							
Power Plant Headgates, Tunnels, Ducts	\$ 1,415	\$ 150	\$ 1,265	\$ 2,830	3	1	4
Total	\$ 14,553	\$ 2,560	\$ 1,265	\$ 18,378	108	13	121

Due to strong performance in the 2017 fiscal year, and similar forecasted performance in fiscal 2018, the level of capital spending level is being increased to address the capital deficiencies backlog identified in NPC's asset data condition database. NPC's capital budget, originally

approved at \$9.06 million for 2016-17 was increased by \$1.895 million to \$10.955 million. During 2016-17 a new capital priority classification system was approved by NPC. In fiscal 2017-18, NPC is budgeting \$18.378 million, identified by priority criteria in Table 10.3:

<i>(thousands)</i>	Code Compliance	Currently Critical	Imminent Failure	Operational Efficiency	Proactive Replacement	Strategic Investment	Total \$
Fleet & Heavy Equipment					\$ 1,098		\$ 1,098
Equipment	\$ 75		\$ 81	\$ 304	\$ 1,097		\$ 1,557
Facility Upgrades	\$ 820		\$ 620	\$ 571	\$ 1,480	\$ 3,150	\$ 6,641
Information Technology				\$ 75	\$ 913	\$ 615	\$ 1,603
Electrical				\$ 35	\$ 150	\$ 75	\$ 260
Roads, Bridges, Paths, Sidewalks	\$ 325		\$ 1,000	\$ 335	\$ 500		\$ 2,160
Power Plants		\$ 2,830					\$ 2,830
Park Development			\$ 100	\$ 170	\$ 260	\$ 1,450	\$ 1,980
Fort Erie Breakwall			\$ 250				\$ 250
Total Capital Plan by Priority	\$ 1,220	\$ 2,830	\$ 2,051	\$ 1,489	\$ 5,498	\$ 5,290	\$ 18,378

For the year ended March 31, 2017, NPC has applied for funding and received approval for \$2.56 million from the Ministry of Tourism, Culture & Sport with all projects to be completed by March 31, 2017.

Debt Financing

NPC's outstanding long term debt as at March 31, 2017 is projected at \$26.5 million, with annual principal and interest charges of \$3.211 million due annually, until the debt is retired in April 2027. This financing relates to the redevelopment of the Table Rock Complex which was completed in 2007.

Significant projects which may require debt financing in future years include:

- Re-development of Queen Victoria Place, a premier location adjacent to the Falls. The VFA condition assessment of this site identified numerous systems requiring upgrading and replacement. Further study is scheduled for 2017-2019 and options will include consideration of revenue generating operations and opportunities to enhance visitor experience.
- Replacement of the irrigation system which supports NPC's Botanical Gardens, School of Horticulture, Butterfly Conservatory and Whirlpool Golf Course.

The use of debt financing in the Asset Management Plan limits further deterioration of capital facilities and takes advantage of opportunities to generate additional revenue/return on investment, with the availability of earnings from operations to service debt charges and fund ongoing operating activities. No issuance of debt is being recommended for the 2018 fiscal year.

Should additional funding become available through either internal or external sources, projects that are currently deferred to 2018/2019 and later years can be advanced for completion in 2017-18.

Foundations or Donations

NPC will explore the use of donations and fundraising to assist with relevant and appropriate capital projects as determined by the Board.

Other External Revenues

Engineering maintains a listing of shovel ready projects to take advantage of grant funds that become available on short notice. Any grant funding would be applied to safety and facility integrity related projects identified in the Asset Management Information System (AMIS) report.

Asset Management Plan

NPC’s most recent audited financial statements provide the following, with respect to historical cost and net book value of NPC’s depreciable assets.

Table 10.4 NPC’s Depreciable Assets as at March 31, 2016				
<i>(thousands)</i>	Buildings & Structures	Equipment	Vehicles	Total
Historical Cost	\$233,117	\$42,496	\$4,086	\$279,699
Useful Life	7 – 40 years	3-10 years	10-12 years	
Annual Amortization Charge	\$6,964	\$1,360	\$35	\$8,359
Net Book Value	\$118,341	\$4,297	\$975	\$123,613
Net Book Value as a Percentage of cost	51%	10%	24%	

The annual amortization charge of \$8.36 million represents the amount by which tangible capital assets depreciated during the 2016 fiscal year. This \$8.36 million amount is based on historical costs and does not include funding for inflation, or for assets that are fully depreciated from an accounting perspective, but are still in use, and it does not include funding for service enhancement.

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

- State of Infrastructure (condition assessment)
- Levels of Service (various planning and engineering studies, space planning, master plans, strategic plan – further study required in 2018 - 2020 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 components will be updated as further studies are undertaken to refine these components.

State of Infrastructure - Condition Assessment

In conjunction with the Tourism Agencies Branch (TAB) and VFA, Inc., a contracted asset management consulting firm and software provider, Engineering staff have been working on a condition assessment of NPC tangible capital assets, referred to as the Asset Management Information System (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 \$168.13 million, including deficiencies in specific structural items, such as electrical systems, roofing, window etc. This

amount of \$168.13 million includes an amount for similar deficiencies in Power Plant buildings quantified at \$27.59 million. NPC has received provincial funding of approximately \$1.8 million to assist in the stabilization mothball 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 current status of deficiencies (capital requirements) based on the AMIS reports as at November, 2016, inspected by VFA are identified in Table 10.5 below.

Table 10.5 - AMIS Asset Condition Report Including Power Plants			
<i>(thousands)</i>	NPC Operations	Power Plants	Total Nov. 2016
Currently Critical	3,662	6,794	10,456
Asset Integrity - Imminent Failure	7,088	452	7,540
Asset Integrity - Proactive Replacement	128,820	20,103	148,923
Code Compliance and Legislative	687	67	754
Discretionary	278	172	450
Total Capital Deficiency, Nov-2016	\$ 140,535	\$ 27,588	\$ 168,123

Table 10.6 contains a more detailed breakdown of the capital requirements by type of asset totaling \$140.5 million identified for NPC operations, excluding the requirements for the Power Plant assets.

Table 10.6 - AMIS Asset Condition Report Excluding Power Plants							
<i>(thousands)</i>	Code Compliance		Asset Integrity		Asset Integrity		Total Nov-16
System Group and Priority	Critical	& Legislative	Imminent Breakdown	Proactive Replacement	Discretionary		
Electrical System	\$ 580	\$ 115	\$ 97	\$ 27,777	-	\$ 28,568	
Equipment	-	-	-	\$ 44	-	\$ 44	
Equipment & Furnishings	-	-	\$ 30	\$ 1,635	-	\$ 1,665	
Exterior Enclosure	\$ 958	\$ 11	\$ 422	\$ 11,746	\$ 104	\$ 13,242	
Fire Protection	-	-	-	\$ 712	-	\$ 712	
HVAC System	\$ 8	-	\$ 2	\$ 27,238	-	\$ 27,248	
Interior Construction and Conveyance	\$ 101	\$ 251	-	\$ 19,172	\$ 33	\$ 19,556	
Plumbing System	\$ 20	-	-	\$ 4,294	\$ 55	\$ 4,370	
Site	\$ 1,775	-	\$ 6,530	\$ 32,482	-	\$ 40,788	
Special Construction	-	-	-	\$ 3,035	-	\$ 3,035	
Structure	\$ 133	\$ 2	\$ 2	\$ 638	-	\$ 775	
Not Applicable	\$ 86	\$ 309	\$ 5	\$ 47	\$ 86	\$ 533	
Total - November 2016	\$ 3,662	\$ 687	\$ 7,088	\$ 128,820	\$ 278	\$ 140,535	

Asset Replacement Strategy

Summarized in Table 10.7 is the projected capital plan forecasted for 2017-2026:

Table 10.7 10 Year Capital Forecast										
<i>(thousands)</i>	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Earnings before interest & Depreciation	\$ 12,930	\$ 19,415	\$ 19,845	\$ 19,989	\$ 20,189	\$ 20,391	\$ 20,595	\$ 20,801	\$ 21,009	\$ 21,219
Provincial Grant*	\$ 2,560	\$ 2,560	\$ 2,560	\$ 2,560	\$ 2,560	\$ 2,560	\$ 2,560	\$ 2,560	\$ 2,560	\$ 2,560
Provincial Grant - Power Plant stabilization		\$ 1,265								
Federal Grant - Pergola Wall	\$ 550									
Federal/Municipal Grant: Fort Erie Bike Trail	\$ 350									
Retention for cash flow contingency	\$ (2,224)	\$ (1,651)	\$ (2,036)	\$ (2,696)	(3,053)	(1,198)	(1,191)	(1,182)	(1,171)	(1,157)
Principle & Interest on Debt Charges**	\$ (3,211)	\$ (3,211)	\$ (3,211)	\$ (3,211)	\$ (3,211)	\$ (3,211)	\$ (3,211)	\$ (3,211)	\$ (3,211)	\$ (3,211)
Capital Funding Forecast	\$ 10,955	\$ 18,378	\$ 17,158	\$ 16,642	\$ 16,485	\$ 18,542	\$ 18,753	\$ 18,968	\$ 19,187	\$ 19,411
Capital Expenditure Forecast										
Fleet & Heavy Equipment	\$ 900	\$ 1,098	\$ 1,120	\$ 1,095	\$ 1,117	\$ 1,140	\$ 1,162	\$ 1,186	\$ 1,209	\$ 1,234
Equipment	\$ 1,347	\$ 1,557	\$ 1,588	\$ 1,572	\$ 1,604	\$ 1,636	\$ 1,669	\$ 1,702	\$ 1,736	\$ 1,771
Facilities	\$ 4,635	\$ 3,491	\$ 4,060	\$ 4,084	\$ 4,156	\$ 4,229	\$ 4,304	\$ 4,380	\$ 4,458	\$ 4,537
Information Technology	\$ 573	\$ 988	\$ 1,008	\$ 981	\$ 1,001	\$ 1,021	\$ 1,041	\$ 1,062	\$ 1,083	\$ 1,105
Electrical		\$ 185	\$ 189	\$ 145	\$ 148	\$ 151	\$ 154	\$ 157	\$ 161	\$ 164
Roads, Bridges, Paths Sidewalks	\$ 1,050	\$ 2,160	\$ 2,203	\$ 2,800	\$ 2,845	\$ 3,392	\$ 3,438	\$ 3,486	\$ 3,534	\$ 3,584
Park Development		\$ 530	\$ 541	\$ 503	\$ 513	\$ 524	\$ 534	\$ 545	\$ 556	\$ 567
Fort Erie Breakwall	\$ 230	\$ 250	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100	\$ 100
Subtotal Life Cycle Asset Replacement	\$ 8,735	\$ 10,258	\$ 10,808	\$ 11,282	\$ 11,484	\$ 12,192	\$ 12,403	\$ 12,618	\$ 12,837	\$ 13,061
Strategic Investments										
Administrative Facilities	\$ 235	-								
Botanical Gardens Redevelopment				\$ 250	\$ 250	\$ 250	\$ 250	\$ 250	\$ 250	\$ 250
Business Develop. - Ticketing Technology	\$ 250	\$ 615								
Cycling/Recreational Trails	\$ 150	-	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150	\$ 150
Floral Show House Redevelopment	\$ 100	\$ 50								
Fort Erie Marina Upgrades	\$ 50	\$ 225	\$ 100	\$ 100						
Oakes Garden Theatre	\$ 1,435	\$ 100	\$ 200	\$ 200	\$ 200	\$ 200	\$ 200	\$ 200	\$ 200	\$ 200
QVP Master Plan		1,150	\$ 1,500	\$ 2,000	\$ 2,500	\$ 2,500	\$ 2,500	\$ 2,500	\$ 2,500	\$ 2,500
Table Rock Redevelopment		\$ 3,000	\$ 3,000	\$ 1,260	\$ 1,500	3,000	3,000	3,000	3,000	3,000
Wayfinding Signage		\$ 150	\$ 150	\$ 150	\$ 150					
Subtotal Strategic Investments	\$ 2,220	\$ 5,290	\$ 5,100	\$ 4,110	\$ 4,750	\$ 6,100				
Power Plants	-	\$ 2,830	\$ 1,250	\$ 1,250	\$ 250	\$ 250	\$ 250	\$ 250	\$ 250	\$ 250
Capital Expenditure Forecast	\$ 10,955	\$ 18,378	\$ 17,158	\$ 16,642	\$ 16,484	\$ 18,542	\$ 18,753	\$ 18,968	\$ 19,187	\$ 19,411

* Estimate only. Provincial capital funding is subject to review and approval each year

**Loans mature on April 30, 2027

In November 2015, NPC had \$12.846 million in capital assets (excluding Power Plants) categorized as Currently Critical, Compliance & Legislative Requirement and Asset Integrity/Imminent Breakdown. With capital works completed during 2016-17, these categories of urgent capital repairs have been reduced by \$1.4 million to \$11.437 million.

Based on forecasted earnings from Operations and estimated Provincial/Federal Grant revenues projected in Table 10.7, NPC expects to complete all of the Currently Critical, Code Compliance and Imminent Breakdown projects by fiscal 2020 and begin a pro-active replacement strategy. A portion of earnings will be retained in the first three years as a contingency for variance in projected revenues that may impact available cash flow. Capital works are generally completed in the last two quarters of the fiscal year, after peak season operating results are known.

11.0 INFORMATION TECHNOLOGY/ELECTRONIC SERVICE DELIVERY PLAN

The Niagara Parks Commission (NPC) Information Technology (IT) has been organized into three functional areas of Network and Infrastructure Services, Application Services and Helpdesk Services.

Accomplishments of 2016

Network and Infrastructure Services

- Expanded fiber network to cover Maintenance Center, Distribution Center and Human Resources Center (separate buildings). This eliminates some point-to-point network radios and creates a reliable, high performance, primary network path to these sites.
- Implemented Voice Over IP (VoIP) across the businesses within the fiber network, consolidating phone systems and phone lines while increasing functionality (ex. Vmail to Email conversion).
- Implemented a storage solution to supplement storage in the virtualized servers' environment.
- For physical security, updated a Closed Circuit Television (CCTV) Enterprise solution and connected CCTV cameras in strategic locations.
- Expanded guest and employee wifi at the Distribution Center, Human Resources Center, Maintenance Center, Welcome Center, Grand View Bus Management and the Aerocar Facility.
- Further expanded Network Authentication, Authorization, and Accounting (AAA) for Payment Card Industry – Data Security Standard (PCI-DSS) Compliance.

Application Services

- Refreshed 47 Culinary POS terminals that were 10+ years in age, running Windows XP. Since Windows XP ended support in April 2014, it's against the PCI-DSS standards to be using the Windows XP POS units. Implemented of the latest version of Aloha (Table serve and Quick Serve Point Of Sale (POS) software). Having the latest (and patched) software on POS units is also a requirement of the PCI-DSS standards.
- Completed procurement and commenced implementation of a new attraction ticketing solution and upgraded the attractions POS equipment.
- 400 Office 2010 software upgrades to Office 2013 completed.

Helpdesk Services

- On average, IT receives 365.1 tickets and closes 363.2 monthly. In 2015, 3,870 Helpdesk tickets were received.
- NPC IT is maintaining service levels, closing 57% of tickets in the same day and 78% of all tickets within the first week of receiving the request.

Plans for 2017-2018

- Improve PCI compliance by educating staff, implementing policies and procedures, further network segmentation, implementing additional security controls, further network monitoring, and additional reporting on PCI-DSS compliance.
- Increase network security with new security hardware and software, enabling greater monitoring, and providing VPN tools, virus protection and near real-time processing of network threats.

- Extend the fiber network to include the Rapidsview facility, Oaks Garden Theatre, Grand View Bus Management.
- Connect Bell Fiber to Aerocar Facility which will feed Whirlpool Golf, and White Water Walk, reducing business interruption due to wireless interference.
- Expand guest and employee wifi to Floral Showhouse, White Water Walk and Rapidsview.
- Expand fiber network to provide required redundancy for payment processing and operations.
- Upgrade SQL Servers from SQL 2008 to SQL 2016.
- Move Office 365 environment to a Canadian Residency Platform.
- Upgrade from Office 2013 to Office 2016.

12.0 INITIATIVES INVOLVING THIRD PARTIES

NPC continues to work in partnership with a number of organizations. To strengthen accountability by third parties, ensure clarity of roles and responsibilities, and ensure appropriate measures are taken to manage its risks, NPC has moved towards formalizing its arrangements with third parties through formal contracts and agreements.

13.0 COMMUNICATION PLAN

In 2017, Corporate Communications will continue to help support and implement the Commission's overall key priorities as identified within this Plan. In so doing, the Communications efforts undertaken by the Commission will help align and position the Agency as supporting the strategic directions identified in the Minister's Mandate Letter, calling on NPC to support a "dynamic business environment that builds vibrant communities, attracts tourists, strengthens the economy and creates jobs."

Background

This Communications Plan outlines the approach and recommended tactics to be undertaken in support of the overall Corporate Communications objectives of The Niagara Parks Commission for the 2017 Tourism Season.

During the 2016-17 year, the Commission benefitted tremendously from positive local and international media attention, garnering over \$85 million in earned public relations value. From the opening of NPC's first new outdoor attraction in over a century – the MistRider Zipline to the Falls, to the 100th anniversary celebration of the Niagara Parks Whirlpool Aero Car, these events and significant media attention, which both garnered, helped promote Niagara Falls and Niagara Parks as a destination worth visiting in 2016.

Additional positive media generated during the year included the deeply touching commemorative service honouring Canada's indigenous population, when the Landscape of Nations Native Memorial was unveiled on the grounds of NPC's Queenston Heights Park in October, 2016. Heightened anticipation and increased media coverage was also secured through NPC's efforts and support of the Niagara Falls Illumination Board, and its \$4 million plans to enhance the nightly illumination of both the American and Canadian Horseshoe Falls. Corporate communications support was also provided in support of NPC community outreach efforts, when it hosted Spring and Fall Public Information Centres (PIC), detailing the specific initiatives and projects the Commission was pursuing in 2016 and beyond.

Internal communications efforts also assisted in the increased awareness and participation of NPC staff in the 2016 employee survey. Numerous projects, including the development of a new learning management training program and implementation of a new payroll and timekeeping system, also required the assistance of NPC's communications team.

The 2016 season can therefore be described as one of accomplishment for NPC, both in terms of attaining the Commission's communications and reputational objectives, but also in terms of how those objectives assisted in improving the overall financial performance of the organization.

2017 Business Goals

- Provide external and internal communications support to the Commission's diverse operational units and revenue-generating departments.
- Further NPC's efforts in both its brand management and reputational objectives, thereby enhancing the overall image and financial performance of the Commission.
- Initiate the creation of a new communications policy, in concert with the development of a renewed NPC Strategic Plan and current brand re-development work, to further the corporate objectives and reputation of the Commission.

- Continue to build internal communications efforts and capabilities in support of NPC's various departmental units and corporate communications objectives.
- Assist in stakeholder communications needed to further the procurement processes required as part of NPC's efforts to revitalize the NPC Marina at Miller's Creek.
- Build stakeholder awareness and support for NPC's efforts to investigate and address the redevelopment needs of the three former hydro-electric generating stations located on its property.

2017 Communications Goals

- Increase awareness and understanding of Niagara Parks as a provincially and nationally significant tourism asset with the goal of making NPC amongst the most respected parks agencies in Canada.
- Continue to enhance and strengthen the relationship between the Commission and its stakeholders, ensuring NPC's vision, mission and strategic plan are shared with and understood by all stakeholders, including employees, elected representatives and the general public.
- Manage issues to continue to build and enhance the corporate reputation of the Commission.

Strategic Considerations

Product and Service Renewal/Celebratory Milestones in 2017

Building on a number of successful projects initiated in 2016 to enhance the overall visitor experience, Niagara Parks has identified several projects to be undertaken in 2017, which will require the support of corporate communications, including:

- Successful completion of an RFP process, leading to the future development and revitalization of the NPC marina at Miller's Creek.
- Stakeholder consultation and final planning required to support a future RFP on the adaptive reuse of three former power plant properties located on NPC lands.
- Phase two revitalization of NPC's Table Rock Complex, focusing on the lower level Welcome Centre to help improve pedestrian flow, facilitate greater customer service and enhance access to NPC's culinary and retail establishments on that level.
- Promotion and celebration of Canada's upcoming sesquicentennial, including implementation of NPC's *Rooted* series of events and programming, highlighting the Commission's important stewardship role.
- Celebration and promotion of the restorative work that has taken place at Oakes Garden Theatre, in anticipation of its 80th anniversary and Canada's sesquicentennial in 2017.
- Development of a renewed corporate Strategic Plan, as well as Master Plan for the future of Queen Victoria Park.
- In alignment with NPC's renewed Strategic Plan, support the continued revitalization work needed in creating a new "Brand" story and identity for NPC.

Enhanced Internal Communications/Upcoming Contract Negotiations

Increased internal communications capabilities have allowed the improved support in communications for priority corporate projects such as the 2016 employee survey, as well as produce on a consistent basis, key communications products including the NPC resident bulletins (four produced in 2016 to date), employee newsletters (five newsletters printed in 2016 to date) and bi-weekly NPC Network Reports.

Entering 2017, the communication unit will be looked to for assistance in the launch of NPC's new payroll and timekeeping program, learning management system and implementation of departmental employee actions plans, flowing from the results of the 2016 employee survey. The development of a new Strategic Plan, will also require internal communications support, as will NPC's "brand" redevelopment work, as NPC looks to develop a renewed common vision, strategy and brand to be pursued over the course of this Three-Year Plan.

Increased internal communication efforts will also assist the Commission as it enters the 2018 fiscal year, ready to enter into negotiations with its largest employee union group – OPSEU Local 217 Parks Employees, in the fall of 2017.

NPC Marina at Miller's Creek/Former Power Plant Facilities

The future redevelopment/revitalization of both the Niagara Parks Marina at Miller's Creek and the three former power plants, located on NPC lands, provide great potential for the Commission.

The Commission has committed itself to undertake a new two stage procurement process for the Marina. As part of this new process, NPC has conducted consultation sessions with potential proponents/developers in order to craft a renewed draft RFP document. The Commission expects to issue the draft RFP in early 2017, followed by the holding of additional consultations with the development community, in order to issue a formal RFP document, by March of 2017.

In terms of three former power plant properties, transferred to the Commission, NPC's ultimate goal is to convert these facilities from unproductive, risk-bound negative assets to productive, innovative and aligned assets, which will continue to shape the Commission well into the next century of its operations. This process will take time, study and expert feedback in order to allow NPC and any future proponent to realize the once in a century opportunity these facilities represent. As a result, in 2017, NPC will begin the process of undertaking stakeholder consultations, as well as completing required studies, such as a strategic conservation plan, so that it may be in a position to move toward a future Request for Proposals on possible adaptive reuse of these buildings.

Build and Strengthen Relationships with Tourism Stakeholders

NPC works cooperatively with its four local municipal governments, tourism agencies and other stakeholder groups to both enhance the image of and increase visitation to the destination. Given the leadership role it has with such boards as – the Tourism Partnership of Niagara, Niagara Falls Tourism, Scotiabank Convention Centre, Niagara Falls Illumination Board, as well as Winter Festival of Lights – Niagara Parks has an important role to play in advancing the cooperative approaches and efforts required to position Niagara and Niagara Parks as a destination of choice for today's discerning travelers.

Key Target Audiences/Stakeholders

- NPC employees
- The Government of Ontario
- Residents of Ontario
- The Government of Canada
- The local community – residents and municipal governments of Niagara Falls, Fort Erie, Niagara-on-the-Lake, and the broader Niagara region

- Tourism organizations such as Niagara Falls Tourism, Regional Tourism Organization, Ontario Tourism Marketing Partnership Corporation, Destination Canada, the Travel Industry Association of Canada, the Travel Industry Association of Ontario, Attractions Ontario, Ontario Culinary Tourism Alliance, attraction operators, local hoteliers, golf course operators
- Local, national and international media
- Tourism visitors

Success Factors

The following factors are critical in achieving the business and communications goals of this plan:

Advance preparation and a proactive approach

Advance preparation and a proactive approach to corporate communications, issues management, communications and event plans, including key messages, target audiences and tactics is needed to ensure maximum positive exposure and coverage of NPC activities.

Consistency

Consistency in delivering key messages is fundamental to the success of all corporate communications. NPC's Chair, and other designated spokespersons, must be able to effectively deliver the key messages outlined in various communications plans that will be developed throughout the year. To ensure consistency, key messages in each of the issues/communications/event plans will be shared with NPC's Chair and senior staff, who may speak to the issue, in advance. Information will also be shared publicly with NPC Commissioners and senior staff, as they may be expected to use and deliver these key messages when discussing Commission business/activities with stakeholders and other acquaintances in the community.

Employee Communications

NPC is one of the largest employers in the region. In addition to Commissioners and senior management, NPC employees have family, friends and associates in the community and region, all of whom will be looking to them as a source of accurate information about the Commission and the various decisions it has made.

Internal communications therefore play an important role in ensuring all employees have accurate information about future directions/decisions that have been made and the reasons behind those decisions. Internal communications will therefore continue to emphasize the vision and objectives contained not only within this Plan, but also in terms of the several new corporate initiatives to be pursued this season, including NPC's plans to implement a new payroll and timekeeping system, new learning management and records management programs and various departmental actions plans resulting from the 2016 employee survey.

Corporate communications will also assist in employee communications strategies/activities to support the development and introduction of a renewed corporate Strategic Plan, Master Plan for Queen Victoria Park and the continued revitalization work on the "Brand" story and identity for NPC.

By supporting these activities, increased communication and heightened awareness will assist the organization, as it works to reach a new mutually beneficial contract agreement with its largest employee group – OPSEU 217 Parks, in the fall of 2017.

An informed and engaged workplace will therefore be key, as corporate communications undertakes its work in support of the organization in 2017.

Communications Protocol with the Ministry of Tourism, Culture and Sport

While the Commission has primary responsibility for communicating upcoming decisions/activities it wishes to pursue, existing Ministry/Agency protocols with respect to Issues Management and Communications need to be followed. The Ministry needs to be apprised of significant public issues, and input sought with respect to key messages and talking points, as the government may be asked to comment on the various decisions and activities taking place at the Commission.

Media Training

As required, training for media spokespersons is recommended. This involves formal media training sessions that include overviews of how the media works and what it is looking for, as well as practice/mock interviews. This may also act as a refresher course for those who have had some media training in the past.

Commitment to Transparency

NPC is committed to openness and transparency. This will continue to guide all communications initiatives in 2017. Examples of this commitment include hosting public Commission meetings, posting agenda/reports/minutes and media releases on NPC's website and the hosting of public information sessions on key issues and initiatives pursued by NPC.

Tactics

Media Relations

Corporate communications involving public relations and media relations expertise attracts visitors to NPC and Niagara Falls. This 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 NPC in major tourism markets and helps open new markets internationally and domestically. Over the past year, NPC public relations and media relations activities generated an estimated \$85 million in public relations value.

2017 media relations activities will include:

- Development of a Corporate and Public Relations editorial/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 of media interest thereby promoting the Parks and providing more reasons for guests from Canada, the United States and International markets to visit and or return to NPC on a regular basis;
- Increasing awareness of the role and importance of the Parks as a provincial and national treasure;
- Promoting Niagara Parks as one of the most respected Parks agencies in Canada;
- Building on the success achieved in 2016, NPC will continue its joint media relations campaigns and plans with WildPlay Niagara Falls, NPC's new Zip Line Attraction and Aerial Adventure Course partner, to ensure maximum positive international coverage and enthusiasm for the opening of the new Whirlpool Adventure Course, which is slated to open in the Spring of 2017;

- Generate media interest and fulsome coverage of the celebratory milestones and significant projects NPC is to undertake in 2017:
 - Canada’s upcoming sesquicentennial – Focusing on NPC’s Rooted in the Garden programs, which emphasize the important stewardship activities and role NPC has undertaken for over 130 years
 - 80th anniversary of NPC’s Oakes Garden Theatre, highlighting the restorative work, upcoming American Public Garden Conference and Citizenship Ceremony to be held at this important heritage and horticultural asset and “symbolic” gateway into Canada
- Work with media to build stakeholder awareness and support for NPC’s efforts to address the future of three former hydro-electric generating stations that are located on its property;
- Use media to assist in the communications efforts required to distribute and raise awareness of the RFP process in support of NPC’s plans for the revitalization of the Niagara Parks Marina at Miller’s Creek.

Internal Employee Communications

Internal communications must play an important role in ensuring all employees have accurate information about future direction/decisions made and the reasons behind those decisions. To achieve this, the Commission will continue to promote a number of communications vehicles designed to foster improved dialogue and positive engagement between staff and management, including utilizing communication vehicles such as:

- The employee newsletter;
- Memos/Bulletins from the Chief Executive Officer and/or Chair which have proven to be valuable in communicating important information to staff immediately and unfiltered, on issues of critical importance to the Commission;
- The employee website with all relevant policies, issues and happenings within the Park, including the bi-weekly “NPC Network”;
- On a bi-annual basis, both the Chair and Chief Executive Officer meet with NPC employees to share information on various topics, including the Commission’s overall financial performance and strategic plan and objectives for the future;
- Smaller, more informal group discussions between management and staff will also continue to take place on a departmental basis, to hear individual concerns and issues faced by employees. These type of meetings will be critically important to the success and creation of Departmental Actions Plans required, as part of the 2016 employee survey.

Stakeholder Outreach Initiatives

Commission and public meetings, which have been held with residents over the past several years have been successful in demonstrating NPC’s commitment to openness and transparency.

In 2017, these initiatives will continue and include:

- Presentations to local municipal councils/public to share valuable information on NPC’s operations and the important partnership role it 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 the Commission, such as:
 - Power Plants
 - Renewed Strategic Plan
 - QVP Master Plan
 - Rooted Programs

- Continuing to hold open Commission meetings throughout the year; and
- Hosting an annual accessibility consultation with members of the public to discuss NPC's efforts in implementing its multi-year accessibility plan, which is required under provincial government legislation as part of the Accessibility for Ontarians with Disabilities Act.

NPC will also continue to take a more proactive approach with industry associations and partnerships it is involved in. While NPC has established relationships with local stakeholders such as Niagara Falls Tourism and the Tourism Partnership of Niagara, greater emphasis, briefings and efforts also have to be directed to such groups as the Ontario Tourism Marketing Partnership Corporation, Destination Canada, the Tourism Industry Association of Canada and the Tourism Industry Association of Ontario to better promote Niagara Parks, its issues and its importance to the tourism sector. NPC's continued role in these organizations is three-fold:

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

Provincial Government Outreach

As a provincial agency, the Commission has a number of processes and reporting mechanisms, including a: Memorandum of Understanding with the Ministry of Tourism, Culture and Sport, Business Plan, Annual Report, and Issues Notes, designed to inform and ensure its accountability to the Province of Ontario.

In 2017, NPC will continue with initiatives to increase awareness and understanding of NPC, its mandate, vision and importance, including:

- Briefings and meetings with not only the Minister and Deputy Minister of Tourism, Culture and Sport, but also with local and other provincial MPPs and federal MPs in support of projects and initiatives of importance to NPC; and
- Participation in Queen's Park and Parliament Hill "Niagara Days" or "Tourism Days" hosted by the Region of Niagara and tourism organizations such as Destination Canada the Tourism Industry Association of Canada/Ontario.

Social Media

Pitches/releases/advisories written for the mainstream media will be repurposed for NPC's Twitter feed and website and sent to bloggers and freelance writers. Photography and video will also be used whenever possible in media relations activities detailed above and in social media initiatives. If video is used, it will be posted on the NPC website and social media sites such as YouTube and Facebook.

Speaking Opportunities

NPC will continue to seek out speaking opportunities for the Chair and the Chief Executive Officer to talk about NPC: its role, contribution, challenges and continued commitment to environmental and historic stewardship and preservation practices.

In addition to local speaking opportunities, NPC will identify opportunities in Toronto, Buffalo, and other key media and visitor markets in Ontario and New York to help raise the profile of the Parks and the Commission.

NPC Website

Detailed information is posted on NPC's corporate website to ensure continued openness and transparency with the public. NPC will continue to enhance this site, as well as its main marketing site www.niagaraparks.com, to further promote the Commission and drive visitation and sales to the Commission. For example, in 2017, as part of its brand redevelopment initiative, NPC is moving to redesign the look and feel of its website, ensuring not only its continued accessibility, but also investigating the availability of providing multiple languages, thereby increasing its appeal to all visitors.

The implementation of these various tactics will allow NPC to emphasize and strengthen its image and brand and highlight the unique and special role it plays in the Ontario tourism industry.

In tandem with the brand redevelopment, marketing staff will be renewing the NPC website and overall digital presence and strategy in 2017. However, until this is finalized, digital efforts will continue to support NPC's web presence, with concentration on maximizing direct sales and social media initiatives, including the introduction of an on-website NPC Niagara Trip Planner section.

Marketing Overview

NPC's advertising and promotions are the responsibility of Marketing, with traditional (print and broadcast) as well as digital (web, mobile and social) media utilized to raise awareness for NPC's offerings, including the Falls attractions, culinary, golf, heritage, weddings, and nature & gardens.

The objective of the Marketing Plan is to fulfill NPC's Strategic Plan related to focus areas including Research & Development, Partnerships, Image, and Products & Services. A key goal over the next two years is to pursue a comprehensive NPC brand redevelopment, to clearly and effectively communicate Niagara Parks stories, and ensure that all touch points present consistent and impactful imagery and design themes. Other objectives include:

1. Knowing and understanding our customer
2. Being more targeted with promotional efforts
3. Enhancing product/service development and renewal
4. Pricing

Traditional initiatives to be considered in developing the 2017 Sales & Marketing Plan will include:

- In-park promotional materials including brochures, rack cards, posters and tent cards supporting all passes, attractions, events, golf, dining, shopping;
- In-park displays such as pole banners, venue identification, way-finders, video network;
- Advertising in tourism publications such as those produced by our partners at Tourism Partnership of Niagara (TPN)/Regional Tourism Organization, Canadian Automobile Association/ American Automobile Association (CAA/AAA) and Toronto Tourism Guides, and the Ontario Tourism Marketing Partnership Corporation (OTMPC);
- In-destination signage including TODS signs (highway, ramp and trail blazers);
- The development and distribution of our 2017 Visitor's Guide; and
- Research tracking visitor demographics and satisfaction levels.

NPC has memberships or relationships with industry associations such as TPN, Canadian Tourism Commission (CTC), OTMPC, Toronto Tourism, Attractions Ontario and Niagara Falls Tourism. Moving forward, NPC's strategy is to ensure the benefits of these associations are leveraged to

their fullest extent as NPC finances do not adequately support independently reaching markets outside the destination.

Following experimentation in 2013 and 2014 with Out of Home media campaigns in the immediate Niagara Falls area, in 2015 NPC marketing elected to pull back from using this as a channel through which to generate awareness of our brand, and its products and services. This strategy, which was developed to build on NPC's market-share of the discretionary spending of Niagara Falls visitors, has instead been refocused to better leverage way-finding and telling the brand story, as well as showcasing products and services, within NPC's own sites. Enhancing efforts towards signage and communications on NPC property, whether static or digital, will enable the NPC to better cross promote and showcase the world-class experiences it offers.

In 2017, Marketing will once again be developing an annual souvenir brochure, the **2017/2018 Niagara Parks Visitor's Guide** as well as continuing with educational posters designed to enhance the visitor experience and understanding of the NPC story at various attractions.

Support will continue for WEGO, the visitor transportation system developed in cooperation with the City of Niagara Falls, including brochures, website, and signage. Onboard posters as well as an "infotainment" video system provides messaging to riders, which exceeded 1.6 million trips in the first year of operation.

Work will continue on the comprehensive brand redevelopment of Niagara Parks. This is a three-year project, starting with the establishment of an interim Brand Standards Policy. This will seek to create both consistencies across current NPC marketing communications and visual identity, as well as define the scope of a broader rebrand project going forward.

Resources were reinstated in 2013 to execute a Customer Satisfaction survey. (An annual tracking study in place since 2001 was suspended in 2012.) The results of this survey provided NPC valuable data on visitor demographics, place of origin and spending habits. An internal reporting system wherein staff input customer postal/zip codes at cash registers to track visitor spending is also in place. These two resources form the basis of NPC's methodology to track the return on advertising investments and will be continued in 2017. As well as the development of a more comprehensive, integrated audience tracking report, connecting the weekly reporting of individual Business Development departments.

On an ongoing basis, NPC researches online marketing efforts and provides engaging and up-to-date imagery and content to reach new markets, drive traffic and conversion, and meet consumer demand for credible and exciting travel planning information. Other Digital initiatives include:

- Search Engine Optimization (SEO) audits continue to identify ongoing changes to ensure that website performance is maximized to increase visitation and online booking revenues
- Ad word buys on Google and Facebook in 2015 garnered significant return on investment and will be key to continue exploring in 2016
- The mobile responsive website will continue to take advantage of growth in the use of devices including smart phones
- Increased content development and presence on social media will continue to build reach and leads

- The relaunch of the Niagara Parks, Shopify e-store to permit easy and secure online purchasing of retail products, including Falls souvenirs and niche products such as Pop & Lolly's candy, Butterfly merchandise, Golf e-gift certificates
- Completion of a review of online affiliate sales with the objectives of controlling commissions paid and maintaining the integrity of branding, pricing and ticket security
- Implementing a digital Customer Relationship Management strategy for pre-, during-, and post-consumer engagement via E-Mail, Social Media and Mobile
- Producing and distributing consumer e-Newsletters regularly to the leisure and targeted niche databases to feature events, golf, sales programs and promotions