



NIAGARA  
PARKS

# BUSINESS PLAN

2019-2022



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## 1. EXECUTIVE SUMMARY

The 2019-22 Business Plan of The Niagara Parks Commission (NPC) builds on the successes of the previous business plan and continues to implement the initiatives of the 10-Year Strategic Plan. In addition, NPC's achievements in 2017-18 and its objectives in this plan support the priorities of the MTCS 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 and destination activation partnerships.

In support of its mandate to preserve and promote the natural and cultural heritage along the Niagara River corridor, NPC provides a range of environmental, cultural and tourism opportunities. These opportunities highlight the natural beauty and heritage of the Niagara River while contributing directly to the sustainability of the organization and economic success of Ontario and the region of Niagara. Further, the NPC's operational activities include world class visitor attractions, premium golf courses, heritage properties, retail outlets, restaurants, popular events and transportation services.

As part of its 10-year Strategic Plan (2018-28), NPC identified the need to raise awareness of the important role it plays in the economic well-being of the region of Niagara, Ontario and Canada. As such, the Commission contracted urbanMetrics to evaluate NPC's economic contributions. Over 14 million people visit the Niagara region annually. Of that, approximately 12 million visit Niagara Parks.

The Economic Impact Analysis identified the following significant range of benefits based on visitation to and operations in Niagara Parks in 2016-17:

- 8.2 million tourists were patrons of attractions, golf courses, retail shops, restaurants, and transportation services operated within Niagara Parks.
- Of the 8.2 million visitors, there were 3.8 million "unique" visitors that spent an average of \$318 per person generating some \$1.2 billion in tourism related spending;
- Supporting over 15,900 jobs and \$682 million in labour income; and,
- \$458 million in total taxes (federal/provincial/municipal).

NPC's annual capital and operating budgets generated over:

- \$123 million to the economy;
- 1,460 full-time years of employment;
- \$75 million in labour income; and,
- \$48 million in tax revenue (federal/provincial/municipal).

In addition, NPC's mandate and operations achieve other community benefits that increase our quality of life by:

- Purchasing locally-produced goods
- Maintaining parks, recreation spaces, year-round road maintenance, heritage and cultural assets
- Improving accessibility
- Reducing municipal servicing costs for local municipalities
- Increasing international visitor exposure
- Contributing to a critical mass of visitors to Niagara Region
- Increasing real estate value on lands close to the Niagara River which, in turn, helps to increase local municipal property tax revenues

NPC and Ontario are experiencing a period of growth and there is significant potential to enhance the rejuvenation process by making our natural and cultural heritage come alive by telling stories that set us apart.

Recent economic updates from the federal Department of Finance, and the Ontario Ministry of Finance support NPC's expectation of continued growth in revenues through the planning period. MTCS has forecast an overall increase in U.S. visitation to Ontario for 2018-20. The economy is expected to continue to grow at a solid pace driven by a combination of low oil prices, a competitive Canadian dollar, new jobs and consumer confidence; however, there is some uncertainty about U.S. economic policies, notably trade, taxation and migration.

Globally, for the sixth consecutive year, growth in travel and tourism outpaced that of the global economy (2.5 per cent). It was even stronger than the growth recorded in the financial and building services, manufacturing, public services, retail and distribution, and transport services.

## Delivering the 10-Year Strategic Plan's Themes

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

1. Preserving and showcasing our rich heritage, culture and lifestyle;
2. Leveraging and activating our natural wonders and iconic experiences;
3. Supporting a dynamic business environment with a focus on attracting investment, connection to local communities, job creation and economic well-being; and
4. Taking experiences, services and hospitality to the next level.

NPC's Strategic Plan serves as a blueprint to balance NPC's potential to achieve excellence on the world stage with a mandate to preserving its natural, built and cultural heritage, while enhancing quality of life and well-being by delivering phenomenal experiences.

## Key Priorities

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

NPC's achievements in 2018-19 and its focus in the 2019-22 Business Plan support the activities of the MTCS through several initiatives. These include market research and brand development to be delivered through NPC's new Three-Year Sales and Marketing Plan, 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 communities through participation in product development and marketing partnerships.

Work was completed on the following key strategic plan initiatives:

- new master plan for Queen Victoria Park
- development of new three-year sales and marketing plan
- wayfinding plan as part of NPC's brand strategy
- Phase I of the redevelopment of the Table Rock Centre



- enhanced forestry management services
- additional WEGO buses
- second year of partnership with Metrolinx
- key technology investments to modernize NPC's corporate systems.

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

In its operating budget for the year ended March 31, 2019, NPC projects a positive variance of \$85,000 from the budgeted net surplus from operations of \$11.727 million, resulting in a net surplus of \$11.812 million for the year.

Highlights of the financial results for NPC projected for the year ended March 31, 2019 and the budget for fiscal years 2020-22 are summarized in Table 1.1 below.

<b>Table 1.1 2018 - 2022 STATEMENT OF OPERATIONS (thousands of \$'s)</b>						
	<b>CURRENT FISCAL YEAR</b>			<b>FUTURE YEARS</b>		
			<b>VARIANCE</b>			
	<b>BUDGET</b>	<b>PROJECTION</b>	<b>TO BUDGET</b>	<b>BUDGET</b>		
	<b>Apr. 2018 Mar. 2019</b>	<b>Apr. 2018 Mar. 2019</b>	<b>Apr. 2018 Mar. 2019</b>	<b>Apr. 2019 Mar.2020</b>	<b>Apr. 2020 Mar.2021</b>	<b>Apr. 2021 Mar.2022</b>
Total Revenue	\$ 121,635	\$ 121,976	341	\$ 126,597	\$ 131,832	\$ 140,378
Total Expenses	\$ 99,586	\$ 99,177	(409)	\$ 104,365	\$ 108,259	\$ 114,151
Net Surplus Before Interest & Depreciation	\$ 22,049	\$ 22,799	750	\$ 22,232	\$ 23,573	\$ 26,227
Loan Interest	\$ 1,205	\$ 1,205	0	\$ 1,104	\$ 998	\$ 885
Depreciation & Deferred Stimulus Funding	\$ 8,412	\$ 9,077	665	\$ 10,315	\$ 10,728	\$ 11,157
Net increase in Power Plant Obligation	\$ 705	\$ 705	0	\$ 705	\$ 705	\$ 705
Annual Net Surplus	\$ 11,727	\$ 11,812	85	\$ 10,108	\$ 11,142	\$ 13,480

## 2. MANDATE

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

NPC is classified as an Operational Enterprise Board-Governed Provincial Agency of MTCS. Since its founding in 1885, NPC has been guided by two key principles:

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

### NPC’s Mandate

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

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

### 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 mandate, NPC provides a myriad of public and community services and assumes an important cultural stewardship role on behalf of the Province of Ontario.

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

### Agencies and Appointments Directive

NPC operates within the accountability framework of the province as set out in the 2017 Agencies and Appointments Directive. This directive outlines the various accountability mechanisms to be established between an agency and its relevant ministry, including the

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

In accordance with this directive, NPC has been classified as a Board-Governed, Operational Enterprise Provincial Agency of MTCS, which provides the authority for NPC to make operating decisions. 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 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 for NPC 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 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 MTCS with oversight and control placed in the hands of an appointed Board, NPC effectively operates for the benefit of the people of Ontario.

### Values

Recently, NPC updated its corporate values. The new values formulate an acronym that is both memorable and meaningful while continuing to be representative of what NPC stands for. The acronym is the word **"INSPIRED"**. The values are:

**I**ntegrity – transparency, accountability, ethics and honesty at the root of all that we do

**N**eeds – aligning products and services with the changing needs of guests, providers and contributors

**S**afety and Security – of staff, guests and NPC property

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

**I**nnovation – that creates exciting and lasting memories for guests

**R**espect – In all interactions between and amongst Commissioners, staff, guests and stakeholders

**E**nvironmental Responsibility – for the protection of our natural, cultural and heritage assets

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

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

## Ministry Goals and Objectives

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

- “We undertake vital market research in the areas of marketing, product development, and investment to aid business decisions by both governments and industry.
- “We encourage private sector investment and new product development to expand Ontario’s tourism sector and promote regional tourism economic development.
- “We support and facilitate the development of new experiences and destinations.
- “We market Ontario as a tourist destination.
- “We invest in Ontario’s tourism agencies.
- “We work with industry and organizations to support the maintenance and growth of the tourism’s economic contribution.”

NPC directly supports the activities of MTCS with the goals and objectives outlined in the 10-Year Strategic Plan. Many of the projects rely on vital market research to enable sound business decisions. Some projects will result in new or updated programs and attractions



(e.g. new concert stage, Indigenous tourism plan, and signature event strategy, etc.) which supports MTCS' position to encourage and support new experiences and product development to expand the tourism sector and promote regional tourism economic development.

NPC will continue its environmental and cultural stewardship roles in preserving NPC's lands and heritage 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.



### 3. ENVIRONMENTAL SCAN

During the course of the 2018-19 fiscal year, NPC experienced continued growth in revenues. Under the guidance of its 10-Year Strategic Plan, NPC will reinvest its financial returns to address deferred capital maintenance needs as well as enhance and renew the visitor experience and relevance of Niagara Parks as a global tourism destination.

Moving forward, NPC's financial plans anticipate continued strength in revenues. New reinvestments in key facilities (e.g. Table Rock Centre) are designed to enhance the guest experience and continue to drive increased revenue growth in future years. The Table Rock Redevelopment project has been identified as a key priority in the 10-Year Strategic Plan and it aims to establish a true sense of arrival for guests visiting the Canadian Horseshoe Falls while supporting and enriching NPC's mandate and brand.

The development and implementation of new strategic initiatives during the course of this Business Plan (such as the creation of a new sales and marketing plan, Indigenous tourism strategy, continued promotion of environmental and cultural stewardship initiatives and the development of an overall cycling strategy) will help facilitate increased visitation and appreciation of Niagara Parks as a key tourism and natural heritage and cultural destination.

#### Fiscal Outlook

According to government and private sector forecasters, the overall outlook for the global economy remains strong with the greatest risk to expansion being the continued and possible escalation of trade tensions between the U.S. and China.

In the U.S., the current economic expansion continues with growth forecast at three per cent in 2018 – fueled by tax cuts, regulation changes and higher government spending. According to the Conference Board of Canada, with the U.S. operating at almost full employment, the tightening labour market has contributed to further wage growth and consumer spending.

The Bank of Canada has reported the Canadian economy has been operating at near capacity for more than one year with GDP growth forecast at 2.1 per cent in 2018 and a further 2.1 per cent in 2019.

According to TD, Ontario's real GDP is forecast to grow by 2.2 per cent in 2018, with domestic spending being a key driver in this expansion. This increase in spending is captured in statistics provided by MTCS. Forecasts for visitation by Ontario residents

within the province is expected to increase by an additional 1.6 per cent in 2018 and 1.5 per cent in 2019.

In its most recent Canadian Outlook Economic forecast, released on Nov. 7, 2018, the Conference Board projected the Canadian economy to grow by two per cent in 2018, before slowing to 1.8 per cent, next year.

These forecasts and assessments were essentially matched by the federal government, when it delivered its fall economic statement on Nov. 21, 2018. According to the federal government, the Canadian economy was forecast to remain strong, projecting real GDP growth in 2018 and 2019 to be in the two per cent range.

In its Fall Economic Statement 2018, the federal Department of Finance reported, “The Canadian economy has rebounded strongly...growth can be attributed to a variety of factors—including solid household consumption growth, the positive impacts of coordinated monetary and fiscal policy, and improved global economic conditions. All of these have contributed to strong job growth, rising wages and confidence, and a recovery in business investment.”

This economic growth has pushed the unemployment rate in Canada to nearly 40-year lows and for the average Canadian worker, wage growth is outpacing inflation.

While celebrating these accomplishments, the federal finance minister indicated concerns remained with global uncertainty in terms of trade agreements, oil pricing and deep corporate tax cuts implemented in the U.S. that could impact future growth projections.

As a result, according to the federal finance minister, given the continued growth in the economy, coupled with the initiatives taken in the fiscal update, the federal deficit is projected to decline to \$11.4 billion by 2023-24 from \$19.6 billion in 2019-20.

In its 2018 Ontario Economic Outlook and Fiscal Review, the Ontario government stated, “Over the 2018 to 2021 period, Ontario’s economy is expected to grow, with rising employment, higher incomes, improved business investment and gains in exports.” Much like the federal government, the provincial Ministry of Finance is forecasting real GDP growth to be two per cent in 2018 and 1.8 per cent in 2019.

The Ontario government signaled its intention to tackle the provincial deficit almost immediately. According to the provincial minister of finance, “During prosperous times,

the government should shore up its finances, so that it is better prepared to weather shocks to the system such as recessions or financial crises.”

In terms of the forecasts and projections made, a consensus has emerged in terms of key external risks identified to Ontario’s overall economic and tourism outlook. Specifically, it will be challenged by issues such as Ontario’s continued debt load, uncertainty over U.S. economic trade policies, tax cuts and regulatory changes in the U.S. and national pipeline expansion uncertainty. These issues may impact future investment and expansion of the provincial and federal economies.

The existing shortages in the labour markets will also have an impact in terms of wage pressures and constraining future investment and expansion opportunities. According to Tourism HR Canada, the national tourism unemployment rate for October was well below Canada’s seasonally adjusted unemployment rate. In Ontario, for example the unemployment rate in the tourism sector was 3.7 per cent, compared to the provincial average of 5.2 per cent for the month.

The Conference Board of Canada reports that in Canada alone, tourism spending is approaching \$90 billion, directly supporting over 600,000 Canadian jobs. Building on this solid performance, the Board predicts tourism activity in Canada will grow another 2.6 per cent in 2018. In fact, over the first half of the year, tourism activities added \$18.7 billion in value to the Canadian economy, an increase of 6.2 per cent over the first half of 2017.

The World Tourism and Travel Council expects Direct Travel & Tourism GDP to grow by four per cent in 2018, outpacing the growth of the world’s advanced economies (3.8 per cent GDP according to the Bank of Canada).

The added attention from the federal and provincial governments to the tourism sector is not surprising given these positive economic contributions and activity. In October 2018, for example, the Ontario government announced its intentions “...to build a new tourism strategy to maximize the economic impact of Ontario’s \$34 billion tourism industry, and unlock its limitless potential.” According to MTCS, the tourism sector in Ontario accounts for over four per cent of the province’s GDP, contributing more than agriculture, mining and forestry combined.

The federal government announced in November 2018 its intention to create an advisory council on jobs and the visitor economy to maximize Canada’s tourism potential. The federal finance minister announced this new advisory council at an event in Niagara Falls.

The announcement detailed the importance of the sector to the country by indicating it represents two per cent of Canada's overall gross domestic product. The federal minister added that the tourism sector directly supports more jobs than the oil and gas, mining, agriculture, auto manufacturing and aerospace industries in Canada, combined.

## Economic Growth and Visitation Forecast

### 2018-20 Economic Forecasts

Global GDP Forecast REAL GDP	Scotiabank Group Forecast Oct. 15, 2018			TD Economics Forecast Sept. 18, 2018		
	2018 (%)	2019 (%)	2020 (%)	2018 (%)	2019 (%)	2020 (%)
Canada	2.1	2.2	1.8	2.2	2.2	1.7
U.S.	2.9	2.4	1.7	2.9	2.7	2.0
Mexico	1.8	2.1	2.4	2.0	2.5	2.7
United Kingdom	1.4	1.5	1.5	1.4	1.7	1.7
Eurozone	2.0	1.9	1.7	2.1	1.8	1.7
Germany	1.9	1.9	1.6	1.9	1.6	1.4
France	1.6	1.6	1.6	1.5	1.4	1.3
Japan	1.2	1.0	0.9	1.1	1.4	0.3
China	6.6	6.2	6.0	6.6	6.2	6.0
India	7.6	7.5	7.5	8.1	7.6	7.5

## Visitation Forecasts

Canada remains one of the world's most popular and fastest growing nations to travel to, largely due to the marketing strategy surrounding its 150<sup>th</sup> anniversary celebrations and publications like the New York Times listing the country as the Top Place to Go in 2017.

Inbound travel to Canada reached a 14-year high in 2016 with 20 million travellers and it is projected that this number will continue to grow particularly from Far East markets like China.

The Conference Board of Canada, in its spring 2018 *Travel Exclusive*, confirmed this assessment stating that tourism activity in Canada had made significant gains in the past few years – much of it attributable to factors such as the hosting of major events, improved economic conditions and a lower Canadian dollar. Benefits were also realized due to increased direct air capacity improvements that facilitated travel directly to destinations of choice for many travelers.

For domestic travellers, approximately 53 per cent of Canadians traveled within Canada in 2017, a trend that is expected to continue across 2018 and into the next three years.

This is particularly true for short-term or more budget conscious trips. When traveling domestically, Canadians tend to prize cost-conscious/budget-friendly trips with notable increases in wellness vacations, exploring “vintage locations” (rediscovering places they have been before perhaps with family) and doing so in larger social groups (though solo travel dominates).

Each of these trends positions NPC well for leveraging both its international popularity as a destination to visit within Canada and as a place for Canadian travellers to “rediscover” domestically.

According to the CBRE Tourism and Leisure Group’s most recent presentation at the Ontario Tourism Summit in October 2018, overnight travel to Ontario continues to experience steady growth. This growth encompasses all travel market segments and is projected to continue for the remainder of 2018 and into the 2019 travel year. CBRE’s projections call for:

CBRE Tourism and Leisure Group - Ontario Travel Outlook Overnight Provincial Visits Percentage Visitation Growth		
	2018 (%)	2019 (%)
Domestic to Ontario	2.1	2.0
United States to Ontario	3.1	2.7
Overseas to Ontario	6.3	5.5

Projections made by MTCS differs slightly from that provided by CBRE data, as they have yet to be updated for the year, with forecasts for domestic, U.S. and overseas visitation set at:

#### Total Ontario Inbound Travel

	2018 (%)	2019 (%)
Ontario Residents	1.6	1.5
Same Day	1.4	1.5
Overnight	2.0	1.6

	2018 (%)	2019 (%)
Other Provinces	1.2	1.2
Same Day	0.3	0.9
Overnight	1.8	1.3



United States	-0.3	3.3
Same Day	-3.3	6.7
Overnight	2.7	0.3

Overseas	3.1	2.9
Same Day	n/a	n/a
Overnight	n/a	n/a

## Digital and Marketing Trends

### Macro Trend: The Experience Starts Before It Begins

On a macro level the impact that digital trends have on travel experiences and the travel industry is huge. The most defining feature of this impact is that the experience is no longer confined to the experience itself, but rather begins well before the prospective guest even travels to their destination. From brand/destination awareness produced by social media and digital content sharing to following a brand's or destination's account and becoming a member of their online community via forums or regular emails, a guest might also never really "leave" the travel experience. It is no longer a place they once went to; it is a place with which they maintain a relationship.

Moreover, online reviews and the massive growth in online/mobile bookings layer deeper connections by building expectations and fostering trust and security through the transaction that continue into the travel experience.

The table below shows marketing trends and opportunities for NPC:

Trends	Opportunities
<b>Storytelling:</b> This remains a large part of the authentic equation. Destinations and attractions must continuously communicate relevant information and news about their offers. Travellers want to be intrigued by what they are buying. Visual content, photos and video are the best way to tell NPC's story.	<ul style="list-style-type: none"> <li>• Expansion and continued development of in-house Niagara Parks content for digital, social, and traditional mass sharing</li> <li>• Travel media partnerships for storytelling by influencers and online travel/topic related media and sites</li> <li>• Enhanced partnerships with online travel agencies to ensure reinforcement of brand and story via third party sellers of our products</li> </ul>

Trends	Opportunities
<p><b>Mobile Booking Growth:</b> With well over 80 per cent of activity bookings being made online now, 49 per cent of these bookings are being made with a mobile device. With this comes the ability for attractions to push additional last-minute offers to its clientele and maximize revenue opportunities.</p>	<ul style="list-style-type: none"> <li>• Continued enhancement of the Niagara Parks mobile experience</li> <li>• Revisit web design and development in approximately three years, giving website lifetime a five-year interval to ensure optimal technology</li> <li>• Clearly defined and constructive relationships with online travel agencies and third-party sellers of NPC's products</li> </ul>
<p><b>Year-round marketing:</b> Many tourism providers are now marketing their offers on a 12-month basis, staying away from seasonal campaigns. Keeping their offerings top of mind throughout the year can help develop niche markets and fill traditionally low seasons.</p>	<ul style="list-style-type: none"> <li>• Define campaign types, breaking down long-term/multi-year to individual "quick campaigns," crafting a year-round, Storytelling Architecture</li> <li>• Further development of our shoulder season and winter season programming and products, leveraging Winter Festival of Lights, Frozen Falls, and culinary opportunities</li> <li>• Redevelopment of leading attractions for year-round appeal</li> <li>• Partnerships with agencies and cultural organizations, leveraging their programming at our sites</li> </ul>
<p><b>Data collection:</b> Travel providers can no longer guess who their clients are and where they are from. Targeting clientele through digital data-gathering profiles narrows the gap between estimating and knowing.</p>	<ul style="list-style-type: none"> <li>• New ticketing program, Accesso, allows for a higher degree of data collection that can contribute to geographic segmenting knowledge</li> <li>• Analytics provided by Google software, and social media sites provides deep dives into website traffic, and community engagement/user info</li> <li>• Third party analytic software can be tapped to enhance above information</li> <li>• Wi-Fi portal in park can contribute to geographic and demographic information</li> <li>• Utilizing third parties, such as Environics Analytics, to supplement segmenting information</li> </ul>

## 4. STRATEGIC DIRECTIONS

NPC's 10-Year Strategic Plan is a blueprint to its Niagara Parks' potential to achieve excellence on the world stage as *one of the most spectacular Parks in the world* with its mandate to preserve the natural, built and cultural heritage.

The Strategic Plan supports NPC's founding principles of financial self-sufficiency and as free as possible public access by increasing revenue and employment opportunities, ensuring ongoing maintenance, preserving the Niagara River corridor and the economic well-being of the region.

### NPC's Vision Statement

By 2028, Ontario's Niagara Parks will be:

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

### Strategic Plan Themes

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

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

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

- Understand visitor expectations of what defines a great experience
- Align current and future experiences with visitor profiles
- Product and market development of year-round experiences
- Provide seamless linkage and/or choices to visitors
- Develop land management strategy
- Ensure accessibility at all NPC sites
- Developing sustainable tourism expansion

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

- Identify key stakeholders
- Define and formalize relationships

Theme 4 – Taking experiences and hospitality to the next level

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

NPC's achievements in 2017-18 and its objectives in the 2019-22 Business Plan support the priorities of MTCS 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.

### **Strategic Focus: 2019-22 High Level Priorities**

The following are the key 2019-20 priorities that NPC will be focusing on to implement its Strategic Plan:

- Table Rock Redevelopment (Table Rock Fast Casual, Bistro, Journey Behind the Falls);
- Journey Behind the Falls Tunnel Upgrade
- Grand View Retail Expansion
- Niagara's Fury Attraction – Update movie and effects
- White Water Walk – Update front façade, retail, signage
- Queen Victoria Park Master Plan – Expansion of Promenade
- Implement year one of the Three-Year Sales and Marketing Plan.
- Promote NPC's environmental and cultural stewardship role
- Analyze and implement an NPC security and emergency plan
- Invest in staff training and developing a recruitment plan that focuses on diversity

In addition, the following 10-year strategic initiatives will be reviewed annually through business plan and budget review processes after 2019/20:

- Canadian Niagara Power Generating Station – Attraction
- Floral Showhouse Relocation and Botanical Gardens
- Whirlpool Aero Car – Update retail, ticketing, accessibility
- Queen Victoria Park Building – condition assessment and renovation
- Power Plants (Canadian Niagara, Toronto and Ontario power generating stations)
- Niagara Parks Marina at Miller’s Creek
- Queen Victoria Park Master Plan and Concert Stage
- Continue to either enhance or create new initiatives to promote NPC’s environmental and cultural stewardship role.
- Develop a new Signature Event strategy
- Continue redesign of and improvements to Grandview Marketplace
- Transportation: improve cycling, pedestrian linkages, crosswalks and recreational trails.
- Develop an Indigenous Peoples Tourism Plan and Initiatives

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



## 5. CURRENT AND FUTURE PROGRAMS, ACTIVITIES AND IMPLEMENTATION PLANS

In 2018-19 NPC implemented initiatives outlined in its approved business plan. This section provides details on those projects and new initiatives identified in the Strategic Plan and a summary of upcoming renewals for Revenue Generating Operations (RGOs) provided through third parties.

### Current Programs and Activities

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

#### Table Rock Redevelopment (Capital: 2017-21)

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

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

Phase I of the reconstruction is scheduled to occur from November 2018 to April 2019 and includes renovations of Table Rock House Restaurant (formerly Elements Restaurant) and Table Rock Shop. Phase II of the project will be in the detailed design process throughout 2018-19 with construction expected to occur from November 2019 to April 2020. This phase includes transforming the quick-serve operations on the main floor to an upscale fast casual experience with expanded indoor seating; converting a

candy shop on the upper level to a bistro that connects with the upper outdoor patio; improvements to the Journey Behind the Falls attraction's queueing and entrance and the enclosure of the west concourse. Construction is scheduled to minimize impact on visitor experience and revenues during the peak seasons.

Concurrent to the main redevelopment project, work will be completed to upgrade and enhance the experience of the Journey Behind the Falls attraction with an upgraded LED lighting solution and audio capabilities in the tunnels.

The Table Rock Redevelopment project is also integrated with the QVP Master Plan process, as the co-ordination of the development of exterior and interior spaces at Table Rock Centre is vital to that flagship location.

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

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

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

The key objectives of the plan are to:

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

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

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

### [Sales and Marketing Plan \(Operating: 2019-22\)](#)

The Three-Year Sales and Marketing Plan (SMP) was a key deliverable in both NPC's 10-Year Strategic Plan and the 2018-19 Business Plan. The Commission approved the SMP at its meeting on Oct. 19, 2018.

The new SMP will guide NPC's efforts to increase the number and types of visitors to Niagara Parks and to enhance overall revenues. The SMP will be co-ordinated with NPC's new Brand Enrichment Plan (BEP) which focuses on deepening the relationship with visitors throughout their travel cycle. The SMP will fully consider ways to integrate digital platforms to connect with visitors before, during and after their travel journey. The core of Niagara Parks visitors will continue to be regional, Ontario, Canada, U.S. and international travellers that seek travel experiences as a way to enrich their lives.

The four objectives of the three-year SMP are to:

1. Position Niagara Parks' Brand Story
2. Grow Visitation
3. Target High-Yield Markets
4. Increase Revenue

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

A key focus of 2019-20 will be to:

- Implement year one of the three-year SMP
- Undertake new guest research
- Advance NPC's Brand Strategy
- Grow sales initiatives (sales calls and sales missions)
- Enhance investments for promotions, digital media and staff resources
- Introduce a patron pass program
- Work with Destination Canada, Destination Ontario, Niagara Falls Tourism and the Tourism Partnership of Niagara

### Environmental and Cultural Stewardship (Operating: 2018-22)

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

Other environmental and cultural initiatives:

- Create a new signature events strategy
- Develop an Indigenous Peoples Tourism Plan
- New outdoor concert venue in Queen Victoria Park to serve a spectrum of cultural activities for music lovers, including the continued growth of The Niagara Stage program
- Support destination activations, including the fireworks program
- New Niagara Parks Public Art program at Table Rock Centre and Botanical Gardens
- New Niagara Parks classic sign at Table Rock Centre

- Enhance principles and guidelines that represent NPC's stewardship role, such as building design standards, maintenance, etc.
- Develop an expanded role for the School of Horticulture that strongly represents NPC's stewardship role and public open spaces, functionally ties together the quality and variety of programming on the north parkway and enhances the guest experience from a range of learning and educational offerings and visual and immersive experiences
- Visitor education program focused on the Niagara Glen Nature Centre and Botanical Gardens that includes community outreach to showcase environmental and culture stories
- Land management plan to establish guidelines for connections to amenities, identify new opportunities and prioritize locations for habitat enhancement
- Expand recycling initiatives, especially in the north and south park areas
- Implement viewpoint management strategies
- Improve the quality and quantity of native shoreline vegetation through proactive management, new environmental stewardship field team
- Continue to work with Brock University to advance stakeholder engagement within Niagara and beyond on NPC's environmental stewardship remediation and innovation programs

#### Guest Safety and Security (Operating: 2018-22)

NPC will continue to implement plans to enhance safety and security to ensure a safe destination for all visitors and staff. Implementation of the security and emergency plan includes an ongoing review of building security, the river front promenade, vulnerable pedestrian/traffic areas and working with provincial and regional authorities, such as Niagara Parks Police Services continued work with Niagara Regional Police Services, to proactively address safety and security.

Other safety and security initiatives include:

- Introducing a bag check program at White Water Walk, based on the successfully implemented bag check program at Journey Behind the Falls in 2018
- Fully staffing platoons (addition of two constables and two seasonal Provincial Offences Officers) and a second K9 unit
- Enhanced patrols in Queen Victoria Park
- Increased presence in north and south parkway areas
- Implementation of a succession plan





### Growing the Talent (Operating: 2019-22)

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

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

Staff training is also a key investment and NPC continues to provide a variety of training opportunities to staff, including dedicated leadership development and change management courses.

### Transportation Plan (Operating: 2018-22)

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

### Grand View Marketplace (Capital: 2018-21)

With the tremendous success of the boat tour operations by Hornblower Niagara Cruises, it has become a priority to redesign Grand View Marketplace to meet the demands and expectations of over 2.5 million guests that go through this attraction per year.

The Grand View Restaurant underwent redevelopment first, which had not been done prior to the new boat tour operations. The restaurant and patio area have been transformed into an open and inviting area for guests to enjoy great food and spectacular views.

Up next is an expansion to Grand View's main retail shop in the marketplace to accommodate the increased number of guests going through the store and to offer them a more comfortable and inviting retail experience. The booths in the lower marketplace will also be redesigned to accommodate the retail expansion and optimize the limited space available in the area. Portable retail kiosks for the upper marketplace are also being explored with implementation planned for the 2019 season.

#### White Water Walk (Capital: 2018-23)

In support of and to advance NPC's 10-Year Strategic Plan, the interior and exterior redevelopments at White Water Walk will fully leverage this iconic location by increasing the visibility of the building's façade (creating a sense of arrival for guests), increasing guest safety and comfort, extending attraction operating hours and offering a variety of products, services and experiences.

The redevelopment will respect the building's rich history and build upon the beauty of the surrounding gorge and its encompassing natural landscape. This nature-inspired theme will continue indoors throughout the modernized retail space, providing guests with an authentic, welcoming, exceptional and unique experience that provides a sense of arrival and place.

This project will be conducted in two phases – Phase 1 for planning and Phase 2 for construction. The procurement of a consultant to develop a plan is occurring in 2018-19 with full planning to occur throughout 2019-20 to be ready for construction during a future seasonal closure to not negatively impact guests and staff.

#### Other Initiatives

Other significant capital projects include:

- Wayfinding (Phase II)
- Adaptive Reuse of Power Plants (Canadian Niagara, Toronto and Ontario power generating stations)

Other significant operationally-funded initiatives include:

- Hosting an archaeology field school at Old Fort Erie
- Implementing a new point of sale system for Golf Operations
- Expanding guest payment options for overseas guests
- Implementing new financial software systems

## Future Programs and Activities

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

- Canadian Niagara Power Generating Station – Attraction
- Floral Showhouse Relocation and Botanical Gardens
- Whirlpool Aero Car Centre – update retail, ticketing and accessibility
- Queen Victoria Park Building – condition assessment and renovation
- Niagara’s Fury Attraction – update movie and effects
- Niagara Parks Marina at Miller’s Creek
- Continued implementation of the QVP Master Plan, including a concert stage

## Revenue Generating Operations (RGOs) Plan – Upcoming Renewals

NPC has several RGOs that are provided by third parties. RGOs 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.

Table 5.1 – Revenue Generating Operations	Expiry Date
Quick Service Coffee Shop – Table Rock Complex	Currently month-to-month arrangement
Art Corner at Table Rock	Currently month-to-month arrangement
Horse Drawn Carriage Rides	January 2019

Table 5.1 – Revenue Generating Operations	Expiry Date
Floral Clock Kiosk Rental	December 2019
Pay & Display Parking Machines	December 2019
Glow in the Dark Retail Items	January 2020
Table Rock Quick Service Pizza Operations	May 2020
License to Operate Automated Banking Machines	December 2020
Viewing Machines	August 2021
Over the Counter Beverages	January 2022
Photo and Digital Capture Services	January 2022

## 6. RESOURCES TO MEET GOALS AND OBJECTIVES

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

Table 6.1: RESOURCES TO IMPLEMENT STRATEGIC PRIORITIES (thousands of dollars)						
Strategic Themes & Key Priorities	Operating Budget			Capital Budget		
	2019-20	2020-21	2021-22	2019-20	2020-21	2021-22
<b>Theme 1: Preserving and showcasing our rich heritage, culture and lifestyle</b> Implement brand strategy to promote NPC regionally, nationally and internationally; Promote NPC's Environmental & Cultural Stewardship Role Urban Forestry Tree Planting Program Partnership with Brock University Indigenous Tourism Program Signature Event Strategy Expanded Waste & Recycling Program - North & South Parkway Enhanced Winter Festival of Lights Programming	\$ 1,686	\$ 1,686	\$ 1,686	\$ 150	\$ -	\$ -
<b>Theme 2: Leveraging and activating our natural wonders and iconic experiences</b> Develop great, year round visitor experiences Land Management Strategy Queen Victoria Park master plan, including new approaches to traffic flow Redevelopment of Table Rock Centre, including retail stores, culinary operations and Journey & Fury Attractions Grandview Plaza renewal Transportation plan, including Metrolinx partnership and cycling strategy Wayfinding - Provide seamless linkage and choices Illumination, lighting, fireworks Improve cycling, pedestrian linkages, crosswalks Refresh White Water Walk building entrance	\$ 150	\$ -	\$ -	\$ 11,780	\$ 9,550	\$ 9,151
<b>Theme 3: Supporting a dynamic business environment with a focus on attracting investment, connection to local communities, job creation and economic well-being</b> Options for stabilization and phasing the adaptive re-use of historic power station buildings Options for redevelopment of Niagara Parks Marina at Miller's Creek	\$ 150	\$ -	\$ -	\$ 359	\$ -	\$ -
<b>Theme 4: Taking experiences, services and hospitality to the next level</b> Service Excellence & Innovation Guest Safety & Security - Crime prevention through design Analyze and implement NPC security and emergency plan Continue with modernization of financial software Invest in staff training and change management Conform with new measures associated with the Strategy for a Safer Ontario Develop a recruitment plan that embraces inclusion	\$ 458	\$ 258	\$ 258	\$ 485	\$ -	\$ -
<b>TOTAL</b>	<b>\$ 2,444</b>	<b>\$ 1,944</b>	<b>\$ 1,944</b>	<b>\$ 12,774</b>	<b>\$ 9,550</b>	<b>\$ 9,151</b>

## 7. RISK IDENTIFICATION

NPC provides updates on risks to the Board's Governance, Ethics and Human Resources Committee, the Board and MTCS. NPC also has an internal audit function that reports on risk directly to the Board's Finance and Audit Committee. 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. This section summarizes risks and associated mitigation strategies as they affect the Business Plan over the three-year planning horizon.

### Risk Category: Strategic/Policy Performance

<b>Risk Factor:</b>	Niagara Parks Police Service maintaining Special Constable status.
<b>Description:</b>	The appointment of Niagara Parks Police Service Special Constables' powers may change pending enactment of the province's Strategy for a Safer Ontario or upon expiration of agreement with Regional Municipality of Niagara Police Services Board on July 27, 2021.
<b>Relation to Strategic Plan:</b>	Taking experiences, services and hospitality to the next level (Theme 4); Deliver service excellence and innovation (Strategy 1); Creating a safe environment for visitors and staff (Tactic 6)
<b>Impact and Scope:</b>	Risk of Niagara Parks Police Service losing its current powers in the Special Constable appointments which would affect NPC's ability to create a welcoming, full service environment responsive to the needs of customers and ensure that operating environments are safe for both visitors and employees in Canada's most significant international tourism destination.
<b>Overall Risk Assessment:</b>	Medium
<b>Mitigation:</b>	The Ministry of Community Safety and Correctional Services (MCSCS) approved the renewal of the Niagara Parks Police Special Constable Appointments for five

years ending July 2021 with no changes to conferred powers.

Following the provincial elections, the new government introduced Bill 68, Comprehensive Ontario Police Services Act, 2019, which received royal assent in March 2019. The specialized policing needs of NPC received an exception to continue using the name "Niagara Parks Police Service" and for its police to continue to carry firearms during the regular course of their duties. A number of accountability mechanisms are now applicable to Niagara Parks Police Service, including the Special Investigations Unit, the Law Enforcement Complaints Agency (formerly ORIPD) and the new Inspector General. NPC will work diligently to review policies and procedures, as well as review the existing MOU with the Regional Municipality of Niagara Police Services Board to ensure compliance with Bill 68.

### **Risk Category: Operational**

<b>Risk Factor:</b>	Business case assessment for and aesthetic improvements at the Niagara Parks Marina at Miller's Creek.
<b>Description:</b>	The marina is the only shoreline/water based amenity on the south Niagara Parkway. Improvements to the area are a key contributor to the strategy of enhancing visitor experience by providing nodes of interest and complementary attractions.
<b>Relation to Strategic Plan:</b>	Leveraging and activating our natural wonders and iconic experiences (Theme 2); Enjoying the experience of being here (Strategy 2); Develop land management strategy (Tactic 2)
<b>Impact and Scope:</b>	Business Case Assessment: Infrastructure Ontario has been engaged to review the business case and to identify a viable business model for the proposed waterfront development opportunity.



<b>Aesthetic Improvements:</b>	The current building and site requires rehabilitation to prevent further deterioration and to ensure continued service to the boating public. The infrastructure is more than 50 years old. A 2018-19 capital budget allocation of \$100,000 was used to complete safety and aesthetic improvements at the site.
<b>Overall Risk Assessment:</b>	Medium
<b>Mitigation:</b>	<p>Business Case Assessment: reassess goals and objectives for the development; challenge expected outcomes for the development and positions on risk-sharing in the development agreement; undertake a series of market soundings to identify both market opportunities and constraints on redevelopment opportunities; develop a financial model reflecting expected costs of the marina site development that provides the means of testing alternative agreement structures so as to identify how project costs and potential revenue sources are influenced under each alternative; develop alternatives for development of the marina and adjacent lands; identify a deal structure that can be incorporated in a development agreement/lease to limit NPC's costs and mitigate exposure to project risks; compile the results from above and present a preferred recommendation for revising the procurement strategy to improve chances of retaining a development partner. CBRE has undertaken a resort development feasibility assessment which will guide IO in drafting the business case. The draft business case was issued to NPC and municipal stakeholders for comment in October/November.</p> <p>Aesthetic Improvements: removal of shrub growth along the fence and trimming of trees; clean-up of day use trailer parking area; removal of waste and shrub growth; installation of post and rail fence; café painted and updated with equipment and interior furnishings; front of</p>

the café and surrounding grounds will receive horticultural improvements.

## Risk Category: Information Technology and Infrastructure

<b>Risk Factor:</b>	Risk of cyber threats.
<b>Description:</b>	Global electronic threats increase with the use of the internet. Networks (like the NPC network) risk suffering a malware, ransomware or other malicious attack.
<b>Relation to Strategic Plan:</b>	Taking experiences, services and hospitality to the next level (Theme 4); Deliver service excellence and innovation (Strategy 1); Creating a safe environment for visitors and staff (Tactic 6)
<b>Impact and Scope:</b>	<p>If NPC's network and information security is compromised by a cyber-attack, public confidence and revenues could be impacted.</p> <p>Malware and ransomware continue to be the most common attacks detected by security experts. Malware analysis is time consuming and intensive. At NPC attack surfaces are increasing with the deployment of Internet-of-Things (IoT), Software as a Service (SaaS) solutions and external application program interfaces (APIs).</p> <p>NPC does not have a Security Officer or dedicated information technology (IT) security resource. There is no formalized training program for IT or awareness and network security program for staff.</p> <p>Threats and attacks occur daily. Currently, staff network accounts are being locked from threats that attempt to "brute force" (guess) passwords. By design, after several attempts the account is locked. This occurs more with staff who have publicly used their email addresses.</p>
<b>Overall Risk Assessment:</b>	Medium

**Mitigation:**

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

IT has been changing each user's network account name to be different than their email address and engaging professional services to upgrade the Active Directory Federated Services (ADFS). This project is planned to be completed by Nov. 30, 2019.

**Risk Category: All Other Risks**
**Risk Factor:**

Contingent liabilities associated with Toronto Power Generating Station (TPGS) structural stabilization.

**Description:**

Continued decline of TPGS and rising cost of restoration.

**Relation to Strategic Plan:**

Taking experiences, services and hospitality to the next level (Theme 4); Deliver service excellence and innovation

(Strategy 1); Creating a safe environment for visitors and staff (Tactic 6)

**Impact and Scope:**

Failure of the TPGS could require immediate significant financial resources to stabilize and has reputational risk for NPC, Commissioners and Ministry. Also, financial risk related to value of Power Plant Obligation upon review of existing engineering studies and completion of additional studies.

**Overall Risk Assessment:**

High

**Mitigation:**

Critical maintenance work completed with Provincial and NPC funding. Additional funding was approved to complete the update of condition assessments. Power Plant Obligation valuation for 2016/17 financial report has been updated using AMIS condition assessment data and engineering reports completed during the year. A sub-committee of the Commission was established to oversee the process related to stabilization and adaptive re-use. Ventin Engineering has been retained to assist with preparing the necessary information to support a comprehensive RFP to facilitate redevelopment of the TPGS. Capital works to repair head gates, tunnels and duct banks are complete with further work on roof maintenance and stabilization in the 2018-20 Business Plan.

**Risk Factor:**

Safety and security of visitors in high traffic areas.

**Description:**

Millions of visitors to NPC arrive each year, with a high concentration of guests in core areas during peak season.

**Relation to Strategic Plan:**

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



<b>Impact and Scope:</b>	With recent global threats to visitor safety at internationally recognized sites and high traffic areas, a proactive approach to implementing initiatives to maintain safety and security of staff and visitors is required.
<b>Overall Risk Assessment:</b>	Medium
<b>Mitigation:</b>	Niagara Parks Police Service, in conjunction with provincial authorities, is developing and implementing a safety and security plan to enhance overall safety of staff and visitors in Niagara Parks. New measures in 2017/18 included imminent threat emergency exercise at Table Rock and successful pilot project of lane closures in the Queen Victoria Park core area. The Queen Victoria Park Master Plan process will consider permanent changes to transportation patterns through core areas in consideration of visitor experience and public safety. Further improvements to lands and facilities are to be designed using Crime Prevention through Environmental Design principles that encourage safety and discourage inappropriate behaviour.

## 8. HUMAN RESOURCES

### Strategic Plan

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

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

### Workforce

For 2019/20 NPC's budget includes a peak workforce complement of 1,847 employees comprised of 340 full-time positions and up to 1,507 seasonal, part-time and student positions. The full-time equivalent (FTE) count is approximately 931 positions. No significant changes in workforce are anticipated within the planning period.

### Service Delivery and Modernization

In 2018, 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 its first full year with the ADP Payroll/Time and Attendance/Human Resources system. This has eliminated antiquated paper timekeeping systems, provided new employee self-service capabilities and improved business reporting. Documentation of new processes and procedures is now underway to ensure efficiencies and consistencies and to identify opportunities for continuous improvement. As an added feature of the base system, NPC launched ADP's mobile application in 2018 to provide greater convenience for staff by enabling more access options through a variety of remote electronic devices while maintaining the integrity of system security.

In 2018, NPC began a procurement process for a new or renewed applicant tracking system. The current three-year contract with Monster Canada will expire in 2019 and a proactive process will ensure that an appropriate system is in place and fully operational during 2019.



To support enhanced safety and security measures across the organization, NPC introduced a new employee identification card system in 2018 designed to provide staff with photo ID as well as appropriate programming of cards for controlled access into NPC facilities. Program implementation will be completed in 2019.

NPC has also procured additional expertise in the areas of accessibility consulting, labour law, external recruitment, outplacement, external investigations, medical services, employee assistance program, first aid/CPR/AED training, temporary employee services, employment testing and mental health first aid.

## Labour Relations

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

NPC held employee events in 2018 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 and United Way events.

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 five 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 an individual or group that exhibits exceptional performance in several of the individual award categories. Individual events were also held within each department throughout 2018 to recognize those employees who have reached milestones of 25, 30, 35 and 40 years of service with the NPC. Regarding staff recognition going forward, NPC will align any future initiatives with government direction within its Expenditure Management Strategy.

As a follow-up to the employee survey, NPC departments continued to implement action plans to build on identified strengths and address any areas for continuous improvement. In the summer of 2019, NPC will conduct a new employee survey to evaluate organizational efforts and progress in areas that were identified in the previous survey as being important to staff.

NPC has three unions and meets regularly to share information and discuss any issues. In 2018, NPC completed negotiations and ratified a new four-year Memorandum of Agreement with OPSEU, Local 217, Park Employees which represents approximately 585 members. That agreement will expire on Oct. 31, 2021. In the fall of 2018, negotiations will





commence with Workers United Canada Council, Local 2347, representing approximately 100 restaurant servers.

NPC implemented several pieces of labour legislation in 2018 including: Bill 174 Cannabis, Smoke-Free Ontario and Road Safety Statute Law Amendment Act; Bill 177 Stronger, Fairer Ontario Act regarding changes to WSIB that recognize mental stress; Public Service of Ontario Act amendments to the Oaths of Office and Allegiance to recognize and affirm Aboriginal and Treaty Rights of Indigenous People; Bill 3 Pay Transparency Act; and, the Police Record Checks Reform Act.

In conjunction with the 10-Year Strategic Plan, NPC initiated the design of a corporate change management program to support staff through the implementation of numerous projects. A vendor of record was procured through Prosci Canada to assist with training and coaching efforts. In 2018, NPC conducted change sponsor training as well as change manager training. Thirty staff were also certified as change leaders to assist with various change management initiatives into the future to support the Strategic Plan.

## Employee Learning and Development

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

As part of an ongoing program for management development through Brock University's Goodman School of Business, a renewed curriculum was delivered in 2018 to 50 managers and supervisors covering topics such as finance, strategic planning, key performance indicators, project management, high-performing teams, emotional intelligence and leading change. Additional cohorts of the program will take place in 2019 to train the remainder of managers and supervisors as part of NPC's goal to provide development opportunities for all managers and supervisors.

In 2018, NPC procured a new three-year agreement with LinkedIn Learning (formerly Lynda.com) which provides a variety of online training resources and self-paced learning modules.

New training modules added to the LMS in 2018 included interview skills training as well as a series on each of the accessible standards under the Accessibility for Ontarians with Disabilities Act.

## Talent Acquisition

In 2018, Human Resources staff co-ordinated 29 posted job competitions for full-time, temporary and apprenticeship positions: 17 were replacements due to staff turnover while 12 of the positions were new roles to address changing organizational needs, skill requirements due to the Strategic Plan's initiatives and continued growth in visitors resulting in longer hours of work and longer seasons for staff.

The majority of NPC's hiring each year is for seasonal positions to meet visitor needs during the spring and summer peak periods. NPC's complement of 1,518 seasonal staff are comprised of 824 students, 18 apprentices and 676 non-student staff. Of the total seasonal complement, 432 were new employees to the NPC in 2018 which is indicative of the economic impact that the organization has on the local community.

NPC conducted two internal audits in 2018 to review both full-time and seasonal recruitment processes. Several improvements were made to ensure continuous improvement in recruitment and hiring practices while maintaining effectiveness and efficiency.

As visitation to Niagara Parks has increased over the last couple of years along with business growth in the region of Niagara and more consistent pay rates are offered by Niagara businesses due to the higher minimum wage, the competition for staff resources, especially students, has become more competitive. With continued plans for business and revenue growth over the next 10 years, NPC will require additional resources to meet organizational needs. In response to these challenges and anticipated needs, NPC is developing targeted recruitment strategies to ensure staff support for the growth initiatives. These will include:

1. Enhanced job fairs to showcase NPC talent and to provide demonstrations of NPC work;
2. Enhanced partnerships with Niagara College and Brock University to bring NPC professionals to the classroom;
3. The potential of a co-op program integrated into the School of Horticulture, requiring specified hours of work requirements to graduate;
4. The development of programs to attract and retain seasonal student staff;

5. Review of seasonal compensation structure to ensure competitiveness within the local market;
6. Investigate the reasons why seasonal staff are leaving NPC mid-season by conducting exit interviews to gain an understanding;
7. Developing relationships with community groups to obtain resources and/or provide required training to fill NPC positions.

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

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.

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

### Compensation Strategy

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

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

All union rates and associated job evaluation strategies are negotiated with the local bargaining agents. 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 employees that is comparable to other Ontario Public Service employees. Seasonal unionized staff receive a payment in lieu of benefits as negotiated between the parties.

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

In 2018, NPC's Executive Compensation Plan was approved by the minister in accordance with the requirements of the Broader Public Sector Executive Compensation Act. The plan has been posted and will be maintained in accordance with the requirements of the Act as well as provincial directives and guides.

A key focus in 2018 was the implementation of the requirements of Bill 148, An Act to amend the Employment Standards Act, 2000 and the Labour Relations Act, 1995. A series of training sessions were held with management staff in 2018 to review the full requirements of Bill 148, including any applicable changes.

## Key Human Resources/Health and Safety Priorities and Actions

### 2019 Priorities and Actions

#### Learning and Development

- Complete implementation of Phase 2 supervisory/leadership training program
- Update training modules in LMS to reflect branding and strategic plan initiatives; introduce new modules to grow employee knowledge and skills
- Complete change management training for change leaders as well as managers and supervisors

#### Employee/Labour Relations

- Complete contract negotiations with Workers United Canada Council, Local 2347
- Complete contract negotiations with OPSEU, Local 217-Park Police
- Complete branded employee ID program in co-operation with Business Development, Niagara Parks Police Service and Marketing departments.
- Conduct corporate-wide employee survey and develop associated action plans
- Update and promote Code of Conduct

#### Talent Acquisition

- Implement renewed recruitment plan to recognize diversity and inclusion while ensuring equal opportunity.
- Develop effective recruitment strategies to address labour shortages and growth needs
- Procure new or renewed applicant tracking system

#### Change Management

- Assist in development and execution of a corporate change management plan

#### Health and Safety

- Update workplace inspection process
- Revision of health and safety management system's audit process
- Update health and safety training program for supervisors
- Update the Joint Health and Safety Committee manual
- Begin documentation preparation to pursue health and safety management system standard certification (e.g. ISO)

### 2020-22 Priorities and Actions

#### Learning and Development

- Develop reciprocal programs between NPC and local educational institutions
- Develop formal mentorship program
- Develop a workforce plan with three- to five-year projections
- Formalize design of corporate succession planning model

#### Talent Acquisition

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

#### Employee/Labour Relations

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

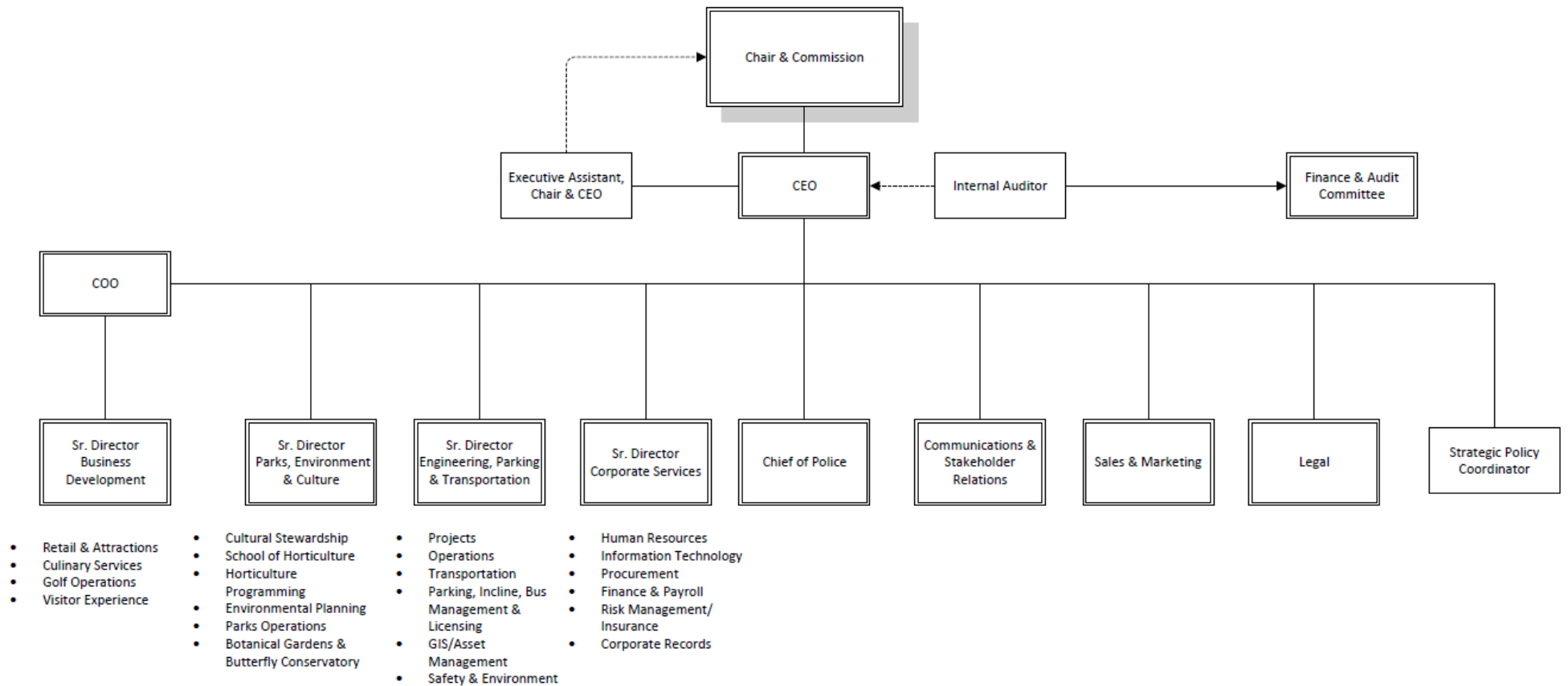
#### Compensation

- Conduct market surveying to ensure NPC's compensation practices are competitive
- Conduct review of job evaluation tools to ensure current relevance

## Health and Safety

- Pursue a health and safety management system standard certification (e.g. ISO)
- Continue with hazard assessment process for each job task and worksite
- Complete the key training requirements for each employee at NPC depending on job title and the level of risk.
- Update of safety communication program for all applicable employees

## Organizational Chart





## 9. PERFORMANCE MEASURES

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

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

### Deliver Service Excellence & Innovation: Self-sustaining Finances

In its operating budget for the year ended March 31, 2019, NPC projects a positive variance of \$85,000 from the budgeted net surplus from operations of \$11.727 million, resulting in a net surplus of \$11.812 million for the year. Further details are provided in Section 10.

For the year ended March 31, 2019, NPC is projecting a contribution from Revenue Producing Operations (RPOs) of \$38.823 million, versus a budget of \$37.566 million, a favourable variance of \$1.257 million.

For the year ended March 31, 2018, NPC improved its actual margin from RPOs over the prior year ended March 31, 2017, by \$5.666 million, as detailed in Table 9.1 below.

<b>Table 9.1 Contribution from Revenue Producing Operations</b> <b>(Revenues less Cost of Goods Sold less Direct Operating Expenses)</b> <b>(Thousand of \$'s)</b>							
	Retail	Attractions	Parking & WEGO	Incline Railway	Culinary	Golf	Total
<b>April 1, 2017 - March 31, 2018</b>	\$ 10,565	\$ 16,797	\$ 7,480	\$ 1,818	\$ 3,308	\$ (665)	\$ 39,303
<b>April 1, 2016 - March 31, 2017</b>	\$ 8,632	\$ 14,366	\$ 6,364	\$ 1,698	\$ 3,161	\$ (584)	\$ 33,637
<b>\$ increase in contribution</b>	<u>\$ 1,933</u>	<u>\$ 2,431</u>	<u>\$ 1,116</u>	<u>\$ 120</u>	<u>\$ 147</u>	<u>\$ (81)</u>	<u>\$ 5,666</u>

For the 2019-20 Budget, NPC has established a target contribution of \$40.534 million from RPOs based on 2018-19 performance, a review of three-year averages, new contracts and forward bookings. Contributions from RPOs are slightly lower than anticipated for a full year of operations under current conditions due to the expected impact on retail and culinary operations affected by the redevelopment of Table Rock Centre in 2018-20. The budget has also been adjusted to incorporate new minimum wage rates from compensation legislation.

## **Self Sustaining Finances: Asset Condition - Facility Condition Index (FCI)**

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

The current FCI for NPC assets in the AMIS database at March 31, 2018 is .44. This represents a current remediation cost of \$175 million divided by current replacement value of \$397 million. NPC has been steadily increasing its investments in asset remediation over the past three years in addition to strategic investments in revenue generating assets and strategic priorities. NPC is targeting an investment rate in life cycle maintenance over the 10-year plan that exceeds the annual depreciation rate, which will reduce deferred maintenance on assets, and thereby improve NPC's FCI steadily over the long-term. In 2019/20, NPC is targeting investment in life cycle replacement of \$12.799 million and the depreciation rate is estimated at \$10.3 million.

## **Deliver Service Excellence and Innovation: People-Related Performance Measures**

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

## **Develop Great Visitor Experiences: Guest Survey**

Guest surveys are conducted annually during May to October to gather guest feedback and to assess satisfaction with their experiences in Niagara Parks. Questions to assess NPC brand awareness were posed in the survey, and responses indicate that 41.6 per cent of respondents were familiar with Niagara Parks, down from 49 per cent in the prior year, while 90.5 per cent of respondents were very likely to recommend Niagara Parks to friends and family (up from 82.4 per cent in 2017). Overall guest satisfaction from sites with enough data to be statistically valid was an average of 95 per cent. NPC is targeting

a similar or higher response for 2018 by continuing to focus on delivering high-quality experiences to our guests to maintain these high satisfaction rates and, in turn, prompting visitors to recommend Niagara Parks. Table 9.2 below summarizes key data from the 2018 Guest Survey:

<b>Table 9.2 Customer Survey</b>						
	<b>2018</b>	<b>2017</b>	<b>2016</b>	<b>2015</b>	<b>2014</b>	<b>2013</b>
Average party size	3.0	2.9	4.1	3.6	3.6	3.77
% of respondents from the US	39.2%	57.0%	62.6%	48.8%	36.7%	51.2%
Respondents who stayed overnight in the Niagara	56.4%	75.9%	72.2%	73.7%	64.5%	76%
% of day trippers who stayed 4 hours or more during	81.1%	89.1%	93.5%	91.2%	89.2%	81%
Respondents who purchased an Adventure Pass	27.7%	42.0%	54.1%	32%	30%	36%

## Develop Great Visitor Experiences: Guest Services Centre

For the first year of operations, NPC achieved the following performance measurement targets for the new Guest Services Centre:

- Incoming guest requests were resolved at first contact 95 per cent of the time (Target: 75 per cent)
- Guest inquiries or issues were resolved with a median full resolve time of 12 minutes (Target: 10 minutes)
- Guest Services Centre Representatives maintained a customer satisfaction score of 96.1 per cent (Target: 90 per cent)
- Guests calling by phone experienced an average wait time of 9 seconds (Target: 1 minute)

## Develop Great Visitor Experiences: Attendance

Attendance statistics are an important key performance indicator for NPC. For the 2019/20 budget, NPC is projecting a similar level of attendance as achieved in the 2018/19 season. In addition to attraction attendance, NPC also tracks customer statistics in culinary (number of covers, average transaction value) and retail (number of transactions/average transaction value).

Table 9.3 below provides a summary of Attendance History.

<b>Table 9.3 Attendance History</b>					
	<b>Change from Prior Year</b>	<b>April 2017 to Mar-2018</b>	<b>April 2016 to Mar-2017</b>	<b>April 2015 to Mar-2016</b>	<b>Nov 2013 to Oct-2014</b>
<b>NPC Operated Attractions</b>	6.9%	2,018,077	1,888,105	1,842,374	1,580,337
<b>Golf Rounds</b>	-6%	72,874	77,209	73,602	68,216
<b>Boat Tour</b>	2.5%	2,306,914	2,250,447	1,841,852	1,528,334
<b>Zip Line</b>	59.1%	77,015	48,410	-	-
<b>Aerial Adventure Course</b>	100.0%	20,679	-	-	-
<b>Historic Sites</b>	34.4%	36,236	26,960	24,913	27,023
<b>Falls Incline Railway</b>	6.7%	1,056,910	990,363	971,941	643,270
<b>WEGO Transportation Service - Green Line</b>	9.0%	1,264,381	1,159,901	852,067	923,964

## Develop Great Visitor Experiences: Information Technology Modernization

In 2018/19, NPC has expanded its Wi-Fi capabilities in the core of Queen Victoria Park, and extended NPC's fibre infrastructure along the north parkway from the core of Queen Victoria Park to the School of Horticulture to improve guest experience and strengthen reliability of network services.

NPC competitively procured Enterprise Content Management software and is in the process of building a robust records management and document management system corporate-wide.

NPC is also in the process of issuing an RFP for new accounting and procurement software, for implementation by March 2020.

## Promote NPC's Environmental Stewardship Role

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

- **Urban Forestry Management Plan** – Established a target of 75 per cent by 2028 as the amount of the Niagara River shoreline that is covered with native vegetation. The upper Niagara River environmental inventory was completed. 75 per cent of the upper Niagara River shoreline currently has vegetation consisting of both native and invasive species with approximately 30 per cent of the existing vegetation primarily consisting of native vegetation. Investments were made in a new stewardship team to address invasive species removal along the entire river corridor.

- Niagara River Coastal Wetland Project - Building on the success of the two coastal wetlands installed at Ussher's Creek and Baker's Creek and with funding support from the Ministry of Natural Resources and Forestry (MNRF), an additional coastal wetland was installed along the shoreline of Gonder's Flats in Fort Erie during the winter of 2017/18. To date, over 800 metres of coastal wetlands have been installed, utilizing over 200 ash trees that have succumbed to the Emerald Ash Borer, 350 recycled Christmas trees, and 460 tonnes of boulders. Native aquatic vegetation is already beginning to establish and the MNRF continues to conduct fish population assessments at the project sites.
- Chippawa Grassland Bird Habitat Project - By the end of 2018, over 50 hectares (120 acres) of native grassland habitat will be restored at the Chippawa Battlefield site. With funding support from Environment and Climate Change Canada, MNRF, and General Electric Canada, the first 25 hectares were restored in the summer of 2017. Ecological monitoring of birds and vegetation are currently underway.
- Educational Institutions - Since the execution of the Memorandum of Understanding between NPC and Brock University's Environmental Sustainability Research Centre, significant progress has been made. A database of all NPC stewardship projects, to date, has been developed to identify project milestones and statistics as well as any data gaps that would be beneficial for long-term planning.
- Partnerships - NPC, in collaboration with Forests Ontario, held its sixth annual volunteer community tree planting event. Over 75 volunteers registered to plant 500 native trees along the Rapidsview parking lot property. With funding and administrative support from Forests Ontario, over 3,000 trees have been planted to date by over 300 volunteers on NPC property since the inception of this program.

### Promote NPC's Cultural Stewardship Role

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

1. Niagara Parks leveraged the iconic Canadian Horseshoe Falls and its partnerships with third party festivals to offer a diverse program of activities in 2018/19 including:
  - Canada Day Festival

- Chinese Cultural Festival
  - iMela (Punjabi/Indian) Cultural Festival
  - Niagara Falls Caribbean Festival
  - Diwali Festival
  - Niagara Falls New Year's Eve
2. Packaging programming and events into various lifestyle series themes around active, healthy living, do-it-yourself (DIY) projects, culinary, history and guest speakers including:
- Active Healthy Living
    - Namaste Niagara
    - Reebok Ragnar Series
    - Women's Half Marathon
    - Ride to Conquer Cancer
    - Barrelman Triathlon
    - Niagara Falls International Marathon
  - DIY Projects
    - Horticulture Design Series at Floral Showhouse
    - Heritage design Series at Laura Secord and Mackenzie Printery
  - Culinary
    - Pop Up Series
    - Fireworks Dinner Series
  - Heritage - Friday Night Frights Ghost Tours
  - Education
    - Heritage Author Series
    - Horticulture guest speaker
    - Women's Author Series at Laura Secord Homestead

Niagara Parks continued to submit successful applications for grants; receiving \$100,000 from the Celebrate Ontario Grant to support an expanded music series, \$54,500 from Celebrate Ontario through a shared submission with Niagara Falls Tourism to support the expanded Falls Fireworks Series and \$125,000 from the Tourism Partnership of Niagara to also support the expanded Fireworks Series.

The Falls Fireworks Series marked its 25th anniversary in 2018 and to celebrate, the series was expanded to 111 shows from 70. Programming like the fireworks and music series contributes to the guest experience in Niagara Parks and Niagara Falls by providing



animation. It also leverages the illumination of the falls and extends the day thereby encouraging guests to stay overnight in the destination.

Niagara Parks worked with the Polaris Music Prize to create the Niagara Stage Music Program in 2018, featuring Canadian artists who had been nominated for the Polaris Music Prize

## 2019/20 and Beyond

NPC will continue to expand upon the successes of 2018 and seek to move the objectives outlined in the 10-Year Strategic Plan forward. Some of the key events and programs that will be undertaken in 2019/20 include:

- Themed floral shows
- Pop-Up Dinners
- Holiday Dinner Celebrations (e.g. Valentine's, Easter Brunch, Mother's Day, Father's Day, etc.)
- Heritage Exhibits
- Trivia at Old Fort Erie
- March Break Matinees, heritage exhibits and events
- Earth Day at the Glen
- Culinary Crawl
- Niagara Falls Summer Fireworks Series
- Revolutionary War Re-enactment, the Battle of Chippawa Commemorative Ceremony, Siege of Old Fort Erie, Soldiers' Field Day
- Coca-Cola, Niagara Parks Live and Summer concert series
- Landscape of Nations Gathering
- Relay races, rides and marathons
- Friday Night Frights Ghost Tours
- Laura Secord Walk (Bruce Trail Club)
- Birds of Prey
- Laura Secord Walk (Friends of Laura Secord)
- Golf tournaments and invitationals
- Chinese Multicultural Folk Arts Day
- Fort Erie Friendship Festival
- Parkway Artist Guild - Art in the Gardens w/ Children's Paint Corner
- iMela Niagara Falls
- Niagara Caribbean Festival



- Rooted in the Garden
- Coast to Coast Speaker Series: Canada's Diverse Voices
- 14th Annual Niagara Parks Apprentice Cooks & Chefs Showcase Dinner
- Annual Winter Festival of Lights and Christmas exhibit
- Christmas Card Workshop
- A McFarland Christmas
- New Year's Eve Niagara Falls



## 10. FINANCIAL BUDGET AND STAFFING

NPC is an Operational Enterprise Board-Governed Provincial Agency that generates revenues from a variety of operations. The largest source of revenue earned is from NPC's commercial activities. For the year ended March 31, 2019 this source is projected to generate approximately \$112.2 million or 92 per cent of total revenues. The remaining \$9.8 million or 8 per cent is generated from water/land rentals, fees and sundries.

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

### Summary of 2018-19 Results, 2019-20 Approved Budget and 2021-22 Forecasted Results

In its operating budget for the year ended March 31, 2019, NPC projects a positive variance of \$85,000 from the budgeted net surplus from operations of \$11.727 million, resulting in a net surplus of \$11.812 million for the year. Variances from budget include additional revenues from RPOs and additional investments in strategic priorities, for a net positive variance in surplus from operations of \$750,000, offset by increased depreciation expense of \$665,000. Higher depreciation expense is associated with increased capital investments in 2017/18 and 2018/19. NPC is undertaking \$19 million in capital works for the year ended March 31, 2019, in accordance with its approved budget.

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

Highlights of the projected financial results for NPC for the year ending March 31, 2019, the Board-approved budget for 2019-20, and a forecast of the following two years 2020-2021 are included in Table 10.1 below. NPC monitors expenditures monthly and adjusts operating and capital expenditures in line with actual revenue experience.

**Table 10.1 2018 - 2022 STATEMENT OF OPERATIONS (thousands \$'s)**

	CURRENT FISCAL YEAR			FUTURE YEARS		
			VARIANCE			
	BUDGET	PROJECTION	TO BUDGET	BUDGET		
	Apr. 2018 Mar. 2019	Apr. 2018 Mar. 2019	Apr. 2018 Mar. 2019	Apr. 2019 Mar.2020	Apr. 2020 Mar.2021	Apr. 2021 Mar.2022
Revenue Producing Operations						
Attractions	\$ 26,439	\$ 25,869	(570)	\$ 27,603	\$ 29,086	\$ 31,645
Retail	\$ 26,059	\$ 26,074	15	\$ 27,554	\$ 29,036	\$ 31,594
Culinary	\$ 22,047	\$ 22,154	107	\$ 22,767	\$ 24,154	\$ 26,614
Parking/Transportation	\$ 14,951	\$ 15,670	719	\$ 16,072	\$ 16,393	\$ 16,721
Golf	\$ 4,238	\$ 4,388	150	\$ 4,528	\$ 4,619	\$ 4,711
Total Revenue Producing Operations	\$ 93,734	\$ 94,155	421	\$ 98,524	\$ 103,288	\$ 111,285
Land Rent - Ontario Power Generation	\$ 7,237	\$ 7,303	66	\$ 7,475	\$ 7,625	\$ 7,777
Commission Rentals & Fees	\$ 161	\$ 147	(14)	\$ 150	\$ 153	\$ 156
Boat Tour Revenue	\$ 16,002	\$ 16,002	0	\$ 16,000	\$ 16,320	\$ 16,646
Zipline	\$ 2,244	\$ 2,065	(179)	\$ 2,204	\$ 2,248	\$ 2,293
Sponsorship	\$ 587	\$ 396	(191)	\$ 435	\$ 444	\$ 452
Premium on U.S.\$ Funds	\$ 735	\$ 763	28	\$ 835	\$ 835	\$ 835
Sundry	\$ 936	\$ 1,145	209	\$ 974	\$ 919	\$ 934
Total Revenue	\$ 121,636	\$ 121,976	340	\$ 126,597	\$ 131,832	\$ 140,378
Expenses						
Revenue Producing Operations						
Cost of Goods Sold	\$ 15,356	\$ 15,293	(63)	\$ 15,783	\$ 16,546	\$ 17,827
Operating Expenses	\$ 40,650	\$ 40,040	(610)	\$ 42,207	\$ 44,248	\$ 47,674
Strategic Plan Key Priorities	\$ 500	\$ 667	167	\$ 400	\$ 408	\$ 416
Culture, Heritage & Events	\$ 3,584	\$ 3,604	20	\$ 3,907	\$ 4,005	\$ 4,105
Parks, Environment & Culture	\$ 12,155	\$ 11,966	(189)	\$ 12,763	\$ 13,015	\$ 13,341
Engineering & Public Washrooms	\$ 7,298	\$ 7,371	73	\$ 7,520	\$ 7,708	\$ 7,901
Niagara Parks Police Service	\$ 3,976	\$ 3,956	(20)	\$ 4,190	\$ 4,295	\$ 4,402
Administration	\$ 11,635	\$ 11,826	191	\$ 12,137	\$ 12,440	\$ 12,751
Sales, Marketing and Visitor Experience	\$ 4,433	\$ 4,454	21	\$ 5,458	\$ 5,594	\$ 5,734
Total Expenses	\$ 99,587	\$ 99,177	(410)	\$ 104,365	\$ 108,259	\$ 114,151
Net Surplus/Deficit Before Interest & Depreciation	\$ 22,049	\$ 22,799	750	\$ 22,232	\$ 23,573	\$ 26,227
Interest Expense	\$ 1,205	\$ 1,205	0	\$ 1,104	\$ 998	\$ 885
Depreciation & Deferred Stimulus Funding	\$ 8,412	\$ 9,077	665	\$ 10,315	\$ 10,728	\$ 11,157
Power Plant Obligation Adjustment	\$ 705	\$ 705	0	\$ 705	\$ 705	\$ 705
Annual Net Surplus	\$ 11,727	\$ 11,812	85	\$ 10,108	\$ 11,142	\$ 13,480

## April 1, 2018 to March 31, 2019

The most significant impact to RPOs in the current year continues to be the strong global economic climate, particularly in Ontario and the U.S. The value of U.S currency in comparison to the Canadian dollar and favourable weather have also been significant contributors to the positive financial results. The strong growth in attendance and revenue experienced in the prior year with Canada 150 Celebrations has leveled off in the current year.

Attendance at NPC's six directly operated attractions is down by approximately 2 per cent, attendance at NPC's four heritage sites is down approximately 27 per cent and parking is down approximately three per cent from the prior year. Golf rounds have improved, up 16 per cent from the prior year. Major reconstruction of NPC's Table Rock Complex – Phase 1 - from November 2018 to April 2019 is impacting retail and culinary revenues from their normal levels. Price adjustments introduced in the fall of 2017 have assisted in maintaining revenue levels despite the slight drop in attendance and the planned reconstruction.

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 Dec. 31, 2018. In 2016/17 and 2017/18, Hornblower exceeded the minimum guaranteed rent. In the current fiscal, 2018/19, revenues for the Boat Tour were impacted by a weather-related delay in opening for the season on May 4, 2018 (compared to 2017/18 opening on April 1, 2017); however, NPC is still entitled to the full guaranteed rent. It is projected that, in 2018/19 NPC will meet, or come very close to reaching the percentage revenues required to exceed the minimum guaranteed rent, and the Boat Tour is projected to reach attendance of approximately 2.3 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 and Adventure Course. These revenues are projected to be \$2.065 million, up from \$1.777 million in the prior year.

### **April 1, 2019 – March 31, 2020 Budget**

The forecast for 2018/19–2020/21 reflects a positive trend with revenues at a level which is expected to cover all costs, including depreciation and amortization of power plants and provide funding for capital asset renewal. NPC receives only periodic capital grants from the Province of Ontario. No operating grants are received from the province for ongoing operations. The 2019/20 operating budget reflected in Table 10.1 above, provides earnings before interest, depreciation/amortization of \$22.232 million. This revenue level will permit NPC to undertake 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.

The following assumptions were used in preparing the forecast:

- The forecasts are based on revenues and attendance at similar levels to 2018-19, actual results for April to September 2018 and the budget for October 2018 to March 2019.
- Revenues at Table Rock Centre incorporate a \$1 million reduction in retail and culinary operations for the November 2019 to March 2020 period, in anticipation of some interruption in normal operations during the Phase 2 reconstruction of those operations. Similar to Phase 1 in 2018/19, the interior reconstruction is being scheduled during the winter season when attendance levels are normally low, and mitigating strategies have been developed by retail and culinary operations to minimize impact on revenues and visitor experience.
- Revenues earned from attractions are based on prices approved at the October 2018 Commission meeting.
- Targeted margin percentage from RPOs for 2019/20 (41.1 per cent \$40.535 million) is similar to 2018/19 projected
- Retail revenues are assumed to include a similar operating season (April to November) and extended hours at the Grand View Boat Tour plaza.
- The budget reflects the use of ambassadors to enhance visitor experience.
- The increase in Boat Tour revenues each year have been based on the Boat Tour lease arrangement with Hornblower including a guaranteed minimum rent for 2018/19. The first year following the five-year minimum guaranteed rent provision in the lease is 2019/20. Hornblower is introducing its new incline transportation attraction in 2019/20 which will assist in reducing visitor lines and boarding delays and should result in additional revenues for both NPC and Hornblower. Revenues for 2019/20 are maintained at the same level as 2018/19 guaranteed rent and assume no change in price for the Boat Tour, slightly increased volumes in passengers based on April opening, and additional revenues from the new incline.
- Adventure pass sales are presumed to increase by approximately 10,000 passes over 2018-19 operating season actual sales (Budget: 246,000 passes).
- Revenues include a full year of operations for the Whirlpool Adventure Course at Thompson's Point.
- Strategic initiative expenses include funding for development of the Niagara Parks Marina at Miller's Creek, continued work on adaptive re-use of the power plants, and the preparation of a master plan for the Botanical Gardens.
- Salary and wage assumptions include a 2.5 per cent contractual increase for staff, included in the four-year agreement reached in collective bargaining completed in

2018/19. Niagara Parks will also be adhering to the executive compensation directive from the provincial government regarding executive staff salaries.

- The expenditure budget incorporates higher costs associated with extended operating hours (longer season and longer days) due to favourable weather and higher visitation levels.
- General rate of inflation at 2 per cent for expenditures, except where prices are fixed by existing contracts.

## 2018-19 Capital Works Plan

In fiscal 2019-20, NPC is budgeting \$25.573 million, identified by priority criteria in Table 10.2. All asset replacement is being budgeted from funds generated through NPC's commercial operations. The level of capital spending proposed will begin to address the capital deficiencies backlog identified in NPC's asset data condition database as well as support implementation of NPC's Strategic Plan. In addition to life cycle investment in existing assets and strategic capital projects, NPC is also undertaking the major reconstruction of its flagship location, Table Rock Centre, in its culinary, retail and attractions facilities in three phases, commencing in 2018/19, for a total estimated budget of \$20 million of which \$10 million is included in the 2019/20 budget. The construction is being phased in the non-peak season of November to March over three years to minimize the impact on visitor experience and revenue.

Table 10.2 2019-20 CAPITAL ADDITION PLAN BY ASSET TYPE AND PRIORITY CLASSIFICATION (thousands \$)							
	Code	Currently	Imminent	Operational	Proactive	Strategic	
(thousands)	Compliance	Critical	Breakdown	Efficiency	Replacement	Investment	TOTAL
Fleet & Heavy Equipment					\$ 1,723		\$ 1,723
Equipment			\$ 22	\$ 201	\$ 1,385		\$ 1,608
Facility Upgrades	\$ 60		\$ 590	\$ 1,000	\$ 3,397	\$ 620	\$ 5,667
Information Technology				\$ 25	\$ 1,298	\$ 485	\$ 1,808
Roads, Bridges, Paths Sidewalks			\$ 150		\$ 2,748		\$ 2,898
Park Development					\$ 200	\$ 11,360	\$ 11,560
Stabilization of Historic Generating Stations						\$ 309	\$ 309
<b>Total</b>	<b>\$ 60</b>	<b>\$ -</b>	<b>\$ 762</b>	<b>\$ 1,226</b>	<b>\$ 10,751</b>	<b>\$ 12,774</b>	<b>\$ 25,573</b>

In addition to funding available from NPC's operations, the MTCS has periodically provided NPC with funding toward critical projects for the fiscal periods ended March 31 as indicated below in Table 10.3. For the 2019/20 fiscal year, no capital grant funding is budgeted.

**Table 10.3 - Projects funded by MTCS Grant (\$ thousands)**

2013-2014	VFA projects	\$56
2014-2015	VFA projects	\$1,858
2015-2016	VFA projects	\$1,912
2016-2017	VFA projects	\$3,450
2017-2018	Bike Infrastructure	\$207
2018-2019		n/a

### Debt Financing

NPC's outstanding long-term debt as at March 31, 2019 is projected at \$22.733 million, with annual principal and interest charges of \$3.211 million, until the debt is retired in April 2027. This financing relates to the previous redevelopment of Table Rock Centre completed in 2007. The 2019-2021 redevelopment of Table Rock Centre is being completed with funding generated from current operations. Niagara Parks is not planning any debt financing projects in the next three-year period.

### Foundations or Donations

NPC will continue to 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 identified in the Asset Management Information System (AMIS) reports to take advantage of grant funds that become available.

## Asset Management Plan

Table 10.4 below shows the historical cost and net book value of NPC's depreciable assets as provided by NPC's most recent audited financial statements.

<b>Table 10.4 NPC's Depreciable Assets (thousands \$)</b>				
<b>as at March 31, 2018</b>				
<i>(thousands)</i>	Buildings & Structures	Equipment	Vehicles	Total
Historical Cost	\$251,052	\$46,803	\$5,790	\$303,645
Useful Life	7 - 40 years	3-10 years	10-12 years	
Annual Amortization Charge	\$7,444	\$1,568	\$418	\$9,430
Net Book Value	\$123,000	\$6,514	\$2,420	\$131,934
Net Book Value as a Percentage of cost	49%	14%	42%	

The annual amortization charge of \$9.43 million represents the amount by which tangible capital assets depreciated during 2017/18. This \$9.43 million amount is based on historical costs and does not include funding for inflation, for assets that are fully depreciated from an accounting perspective but are still in use or funding for service enhancement.

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

- State of Infrastructure (condition assessment)
- Levels of Service (various planning and engineering studies, space planning, master plans, strategic plan – further study required in 2019-21 to determine 10-year needs analysis)
- Replacement Strategy (10-year asset replacement plan informed by studies)
- Financing Strategy (10-year funding strategy, including funding from operations, debt financing, grants, donations, public private partnerships and other external sources)

This section of the Business Plan contains the preliminary elements for a detailed Asset Management Plan. The plan's components will be updated as further studies are undertaken to refine them.

## State of Infrastructure – Condition Assessment

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

The AMIS project has provided a current cost estimate of deficiencies of \$200.925 million, including deficiencies in specific structural items such as electrical systems, roofing, window etc. This amount of \$200.925 million includes an amount for similar deficiencies in power plant buildings quantified at \$26.729 million. NPC has received provincial funding of approximately \$1.8 million to assist in the stabilization process and condition assessment studies of the power plants. The value estimates provided in AMIS are updated each year based on updated inspections, capital work undertaken, and additional depreciation and an inflation factor for requirements that have not been undertaken. The status of deficiencies (capital requirements) based on the AMIS reports as at November 2018 and inspected by VFA are identified in Table 10.5 below.

<b>Table 10.5 - AMIS Asset Condition Report Including Power Plants (thousands \$'s )</b>				
<i>(millions)</i>	NPC Operations		Power Plants	Total
Currently Critical	\$	3,565	\$ 2,274	\$ 5,839
Asset Integrity - Imminent Failure		9,514	19	\$ 9,533
Asset Integrity - Proactive Replacement		160,785	23,654	\$ 184,439
Code Compliance and Legislative		654	66	\$ 720
Discretionary		273	121	\$ 394
<b>Total Capital Deficiency, Nov-2018</b>	<b>\$</b>	<b>174,791</b>	<b>\$ 26,134</b>	<b>\$ 200,925</b>
<b>Total Capital Deficiency, Nov-2017</b>	<b>\$</b>	<b>155,081</b>	<b>\$ 26,730</b>	<b>\$ 181,811</b>

Table 10.6 contains a more detailed breakdown of the capital requirements by type of asset totaling \$174.791 million identified for NPC operations, excluding the requirements for the power plant assets.



**Table 10.6 - AMIS Asset Condition Report Excluding Power Plants (thousands of \$'s)**

<b>System Group and Priority</b>	<b>Currently Critical</b>	<b>Code Compliance &amp; Legislative</b>	<b>Asset Integrity - Imminent Breakdown</b>	<b>Asset Integrity - Proactive Replacement</b>	<b>Discretionary</b>	<b>Total Nov 2018</b>	<b>Total Nov 2017</b>
Electrical System	378	120	18	28,203		28,719	29,905
Equipment				46		46	46
Equipment & Furnishings			31	1,871		1,902	1,826
Exterior Enclosure	965	12	436	11,940	106	13,459	14,110
Fire Protection				739		739	739
HVAC System	8		3	28,471		28,482	27,465
Interior Construction and Conveyance	103	251		19,426	21	19,801	21,177
Plumbing System				4,510	58	4,568	5,103
Site	1,880		9,020	61,449		72,349	49,924
Special Construction				3,270		3,270	3,264
Structure	144		2	811		957	1,028
Other	86	271	5	49	88	499	495
<b>Total - November 2018</b>	<b>3,564</b>	<b>654</b>	<b>9,515</b>	<b>160,785</b>	<b>273</b>	<b>174,791</b>	<b>155,082</b>
<b>Total November 2017 Comparative</b>	<b>3,689</b>	<b>646</b>	<b>9,635</b>	<b>140,828</b>	<b>284</b>	<b>155,082</b>	

### Asset Replacement Strategy

Table 10.7 summarizes the projected capital plan forecasted for 2019-29 for projects to be funded from NPC operations.

The 2018/19 Asset Replacement Plan incorporates approximately 50 per cent (\$12.799 million) in life cycle asset replacement as well as 50 per cent (\$12.465 million) in strategic investments in capital that assist with the implementation of NPC's Strategic Plan priorities.

During the year, NPC approved a Cash Management Policy and a Capital Works & Equipment Maintenance & Renewal Program Policy, to assist in development of capital plans that ensure maximum funds are made available for investment in deferred maintenance and strategic priorities while ensuring long-term financial sustainability and flexibility for NPC operations.

Based on forecasted earnings from operations and estimated provincial/federal grant revenues projected in Table 10.7, NPC expects to complete the Currently Critical, Code Compliance and Imminent Breakdown projects by fiscal 2021 and begin a pro-active replacement strategy. Most NPC's revenues are earned in the first two quarters of the fiscal year and capital works are generally completed in the last two quarters of the fiscal year. After peak season operating results are known, which provides a contingency to temporarily defer capital if earnings in a year do not meet budget.

Table 10.7 10 Year Capital Forecast (thousands of \$'s) - Funded from NPC Commercial Operations												
	2018-19	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29
	Budget	Projected										
Earnings before interest & Depreciation	22,049	22,800	22,232	23,573	26,227	27,084	27,553	28,096	28,657	33,288	33,872	34,752
(Increase) Decrease in Cash on Hand		(501)	6,552									
Principal & Interest on Debt Charges*	(3,211)	(3,211)	(3,211)	(3,211)	(3,211)	(3,211)	(3,211)	(3,211)	(3,211)	(3,211)	(2,922)	
<b>Capital Funding Forecast</b>	<b>18,838</b>	<b>19,088</b>	<b>25,573</b>	<b>20,362</b>	<b>23,016</b>	<b>23,873</b>	<b>24,342</b>	<b>24,885</b>	<b>25,446</b>	<b>30,077</b>	<b>30,950</b>	<b>34,752</b>
<b>Capital Expenditure Forecast</b>												
Equipment	1,505	1,461	1,607	1,600	1,632	1,665	1,698	1,732	1,767	1,799	1,834	1,870
Facilities	2,794	2,931	5,048	3,128	4,732	3,998	4,078	4,159	4,240	4,322	4,407	4,493
Fleet & Heavy Equipment	1,430	1,680	1,723	2,000	2,040	2,082	2,123	2,166	2,210	2,253	2,298	2,344
Information Technology	990	990	1,323	1,038	1,059	1,080	1,102	1,122	1,144	1,167	1,190	1,214
Park Development	170	171	200	350	357	364	370	375	382	390	398	406
Roads, Bridges, Paths Sidewalks	2,515	2,515	2,898	2,696	4,045	4,108	4,189	4,272	4,356	4,441	4,529	4,619
WEGO Bus Replacement										2,000	4,000	4,000
Subtotal Life Cycle Asset Replacement	<b>9,404</b>	<b>9,748</b>	<b>12,799</b>	<b>10,812</b>	<b>13,865</b>	<b>13,296</b>	<b>13,560</b>	<b>13,824</b>	<b>14,099</b>	<b>16,372</b>	<b>18,656</b>	<b>18,946</b>
<b>Strategic Investments</b>												
Table Rock Redevelopment	5,000	5,000	10,000	5,000								
Aero Car Upgrades	70	70										
Journey Behind the Falls Tunnel Upgrade	25	25	150	1,000								
Grand View Renewal	650	789	200	1,400								
Floral Showhouse and Botanical Gardens	275	275	220									
White Water Walk	250	150			1,000							
Queen Victoria Park Master Plan	1,979	1,827	1,060	2,000	5,411							
Brand Strategy and Wayfinding	410	410	150	150	100							
Niagara Parks Marina at Miller's Creek	100	119	50									
Modernization Initiatives (tech investments)	525	525	485									
Waste & Recycling	150	150	150		500							
Niagara's Fury Attraction					2,140	10,575	10,782	11,060	11,348	13,704	12,294	15,807
Other Strategic Investments												
<b>Subtotal Strategic Investments</b>	<b>9,434</b>	<b>9,340</b>	<b>12,465</b>	<b>9,550</b>	<b>9,151</b>	<b>10,575</b>	<b>10,782</b>	<b>11,060</b>	<b>11,348</b>	<b>13,704</b>	<b>12,294</b>	<b>15,807</b>
Stabilization of Power Plants			309									
<b>Capital Expenditure Forecast</b>	<b>18,838</b>	<b>19,088</b>	<b>25,573</b>	<b>20,362</b>	<b>23,016</b>	<b>23,871</b>	<b>24,342</b>	<b>24,884</b>	<b>25,447</b>	<b>30,076</b>	<b>30,950</b>	<b>34,753</b>
<b>Capital - Strategic Investment Ratio</b>	<b>50%</b>	<b>49%</b>	<b>50%</b>	<b>47%</b>	<b>40%</b>	<b>44%</b>	<b>44%</b>	<b>44%</b>	<b>45%</b>	<b>46%</b>	<b>40%</b>	<b>45%</b>

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

## Staffing - Summary of Staff Complement

NPC's budget includes approximately 340 full-time and 1,507 seasonal, part-time and student staff (when converting seasonal and part-time hours, this is a full-time equivalent of approximately 931 positions) for the 2019/20 peak season. There are 212 non-union management, 695 unionized employees, 824 students, 98 part-time and 18 apprentice staff. Of the unionized staff, OPSEU represents Park and Police employees and Workers United Canada Council represents restaurant servers.

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.

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.

## 11. INFORMATION TECHNOLOGY AND ELECTRONIC SERVICE DELIVERY PLAN

NPC's Information Technology (IT) division is organized into three functional areas: Network and Infrastructure Services; Application Services; and Helpdesk Services. The following is an overview of the accomplishments of 2018 to 2019 and plans for 2019 to 2020 based on these functional areas.

### Accomplishments of 2018-19

#### Network and Infrastructure Services

- Expanded fibre network to the School of Horticulture. The fibre network now extends 13 kilometers from the Distribution Center to the School of Horticulture. This eliminates some point-to-point network radios and creates a reliable, high performance, primary network path to White Water Walk, Whirlpool Aero Car, Whirlpool Golf Course, Niagara Glen Nature Centre and the School of Horticulture. The expansion provides more reliable bandwidth for data, payment processing, telephony, alarm monitoring and CCTV surveillance.
- Implemented a new, easy to use, guest Wi-Fi on-boarding solution (Aruba ClearPass) that enables visitors to easily connect mobile devices and share their Parks experience.
- Added a backup Bell Fibre solution to provide internet connectivity for the PCI Card Data Environment which provided redundancy for credit card payment processing.
- Additional CCTV surveillance cameras were implemented in strategic locations to improve safety and security.
- Implemented new network infrastructure (cell station, firewall, POS, printer, computer, telephony) for the office at Niagara Parks Marina at Miller's Creek.
- Implemented new network infrastructure (switches, POS, telephony, computers) at new Clifton Gate location.
- Expanded network authentication, authorization, and accounting on networking devices required for PCI-DSS Compliance.

#### Application Services

- Implemented a new integrated attraction ticketing solution, Accesso Siriusware, for on-premise attraction ticketing and Accesso Passport for online attraction ticketing. This involved the replacement of 69 POS devices, scanners and printers.

This has enabled a more reliable ticketing solution for attractions, parking areas, weddings and heritage sites.

- Office 365 moved from U.S. soil to Canadian soil for Canadian data residency.

#### Helpdesk Services

- As part of a planned attrition, refreshed 61 problematic PCs and desktops over the age of five years.
- On average, IT closed 377 Helpdesk tickets monthly. In 2017, 3,938 Helpdesk tickets were received.
- Maintained service levels, closing 58 per cent of tickets in the same day and 79 per cent of all tickets within the first week of receiving the request.

### Plans for 2019-2020

#### Network and Infrastructure Services

- Improve PCI compliance by hardening NPC network, educating staff, implementing new security policies and procedures and deeper network content monitoring.
- Improve guest Wi-Fi access along Niagara Parkway from Table Rock Centre to Grand View Marketplace.
- Replace 25 end-of-life switches at critical locations to increase switch security and reduce the risk of switch failure.
- Add a broadband internet connection to Legends on the Niagara Golf Course to eliminate point-to-point radios and increase the reliability and security of network traffic.
- Add a virtual host server to provide additional storage and computing power to virtualized servers.
- Refresh problematic CCTV surveillance devices at select locations to improve safety and security.

#### Application Services

- Further implementation of the Enterprise Content Management System involving Corporate Services records identification, classification and electronic filing.
- Implement new financial solutions for general ledger, project costing and fixed asset ledger.
- Implement a new golf reservation and booking application.

#### Helpdesk Services

- Implement a new network and device monitoring tool to improve network and application monitoring.
- Maintain Helpdesk service levels while increasing network servers, switches, Internet of Things and mobile devices.

## 12. INITIATIVES INVOLVING THIRD PARTIES

NPC continues to work with stakeholders to achieve its overall operational requirements. 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. The following chart outlines third party providers to NPC. It should be noted that NPC does not provide grant funding to any of the parties below.

### Business Development, Events & Public Relations

Third Party Name	Business Objective	Business Strategy
Hornblower Niagara Cruises	Operator for boat tour service for Niagara Parks under a 30-year agreement that began in 2013.	The boat tour is a Canadian Signature Experience and a key demand generator for Niagara Parks and the destination. Niagara Parks works collaboratively with Hornblower on packaging and promotions to drive higher visitation and revenue.
Niagara Adventure Excursions (operating as WildPlay Niagara Falls)	Operator of two attractions for Niagara Parks: MistRider Zipline to the Falls and Whirlpool Adventure Course under a 10- to 15-year agreement that began in 2016.	The zipline and ropes course are two new attractions that offer guests an opportunity for an adventurous experience.
Falls Fireworks Series	Activate fireworks series and co-ordinate the program on behalf of local stakeholders.	Fireworks enhance visitation for all partners.
Illumination Support of the Falls	NPC is a member of the Niagara Falls Illumination Board, a not-for-profit corporation made up of 18 representatives from the City of Niagara Falls (Ontario), Ontario Power Generation Inc., City of Niagara Falls (New York), New York State Parks, New York Power Authority.	It is the Illumination Board's responsibility and mandate to finance and maintain the nightly illumination of both the Canadian Horseshoe and American falls.

New Year's Eve (NYE)	Co-host annual NYE show in Queen Victoria Park by way of a contractual relationship with the City of Niagara Falls and other community stakeholders.	This is an important event for the destination to maximize revenue and public relations potential for NPC and the stakeholders.
WEGO Vehicle Transportation System	In August 2011, NPC and the City of Niagara Falls signed a 10-year agreement to develop an integrated Visitor Transportation System, known as WEGO, to provide a seamless connection between tourist areas within the City and NPC's sites and attractions.	NPC received 11 new fully accessible buses (nine articulated/two single buses) as part of the overall \$50 million in funding provided to the City by the federal and provincial governments for this project. Annually \$1.15 million is paid by NPC to the City as part of a 10-year agreement.
Regional Tourism Organization (RTO)	RTOs have the responsibility for marketing as well as longer-term strategic planning for tourism regions, including product development, workforce strengthening and the provision of travel information.	NPC serves on the board of the RTO. Participation allows NPC to take part in and help influence the co-operative advertising and marketing strategies to promote visitation and increased stays within the region.
Scotiabank Convention Centre	NPC is a founding partner in the Scotiabank Convention Centre in Niagara Falls. NPC has a seat on the board of directors.	NPC supports the Convention Centre to help draw meetings and conventions to the destination and NPC receives business from those conventions.
Niagara Falls Tourism	NPC is a member of Niagara Falls Tourism and serves on the board for the local destination marketing organization.	Tourism is a critical part of NPC's business and having a strong and well-performing Destination Marketing Organization (DMO) is important in providing marketing programs that benefit the destination and NPC.
Winter Festival of Lights	NPC is a founding partner and Board member in this community and NPC event.	The event draws visitors to Niagara Falls and extends the destination's season.

Culinary Franchises – Tim Hortons and Pizza Pizza	Niagara Parks owns and operates two Tim Hortons franchises and a Pizza Pizza franchise.	These franchises provide a recognized quick serve food option to guests and offer Niagara Parks a revenue generating opportunity.
Digital Attractions	Operator of the FX Studio photo capture services at Table Rock Centre and Grand View Marketplace under a five-year agreement that began in 2017. The studio captures photos of guests at Journey Behind the Falls, Hornblower Niagara Cruises, White Water Walk and Butterfly Conservatory.	Operations are also being implemented at Whirlpool Aero Car.
Ambassatours	Operator of an in-park bus tour formerly operated by Double Deck.	The in-park bus tour provides guests with a unique and entertaining tour narration of the history, sights and sounds of Niagara Parks.
Metrolinx	Metrolinx, an agency of the Government of Ontario under the Metrolinx Act, 2006, was created to improve the coordination and integration of all modes of transportation in the Greater Toronto and Hamilton Area.	Promotional partnership with Metrolinx in 2017 to support summer train service to Niagara including bike storage cars on each train schedule. Partnership facilitates access to other Ontario markets as well Metrolinx's broader mandate to encourage and support cycling and active transportation.

## Parks

Third Party Name	Business Objective	Business Strategy
Environment Canada (Habitat Stewardship Program and Great Lakes Sustainability Fund) and the Ontario Ministry of Natural Resources and Forestry (MNRF) (Species at Risk Stewardship Fund)	To acquire resources needed to protect, maintain and preserve natural areas that make up 25 per cent of NPC lands.	In addition, resources are used for education and outreach both internally and externally.



Niagara College and Brock University	Provide expertise for various environmental, recreational, and technical programs to support NPC's stewardship program and Botanical Gardens.	Provide NPC staff with valuable data. In 2018, NPC signed a memorandum of understanding with Brock University to collaborate on environmental stewardship initiatives.
Science North	Support the Nature Exchange at Niagara Parks' Nature Centre.	Liaise with Science North to manage the Nature Exchange program at the Nature Centre.
Corporate and non-profit support (OPG, Friends Groups, Naturalists, Niagara Peninsula Conservation Authority, Land Care Niagara, MNRF, Ontario Access Coalition (Boulderers), Royal Astronomical Society Club – Niagara Centre, Niagara Geological Society)	Alliances have allowed for environmental, educational, and recreational initiatives that NPC would not otherwise have the internal resources to achieve.	Collaboration provides support for numerous preservation and restoration activities on NPC's lands.
Forests Ontario	Research and development of tree seed collection strategy for Niagara.	Provides the opportunity to offer seed collection related workshops and training to NPC staff.
Ontario Power Generation	Improvements on the Lands Protection Program.	Partnership with OPG provides funding and technical support to NPC in its native tree planting and reforestation efforts.
Monarch Teachers Network, Toronto and Region Conservation Authority and Niagara Falls Nature Club	To increase the education programming and outreach of NPC's Butterfly Conservatory.	Provides the capabilities to offer educational programming to local teachers and students using monarch butterfly life history along with providing funding to offset monarch workshop costs to participants.
Canadian Food Inspection Agency	Research in management and control of invasive species.	Research in controlling damage from emerald ash borer and hemlock woolly adelgid.

Trail and cycling organizations (Greater Niagara Circle Route, TransCanada Trail, Waterfront Trail, Greenbelt Route, Ontario Trails Council, Venture Niagara, Ontario by Bike)	Increase promotion and development of cycling opportunities and infrastructure within NPC and the surrounding region.	Provides opportunities for joint marketing initiatives, access to funding and trail management expertise as it relates to the Niagara River Recreation Trail.
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## Heritage

Third Party Name	Business Objective	Business Strategy
Parks Canada	Programming Partner	Collaboration on events and tours. Cross-promotional opportunities as appropriate.
Printery Group	Maintain the Printery Collection at Mackenzie Printery heritage site.	Collaborate with local community association to showcase the history of printing.
Wilfrid Laurier University	Archaeology at Old Fort Erie	The Wilfrid Laurier University Archaeology Field School has been actively involved at Old Fort Erie and nearby Bertie Hall over the past five years. It is focused on the 1764 to 1815 period of occupation.

## School of Horticulture

Third Party Name	Business Objective	Business Strategy
Olds College, Olds Alberta	Articulation agreement for NPC's School of Horticulture graduates to obtain a Bachelor of Applied Science Degree (block transfer).	Supports corporate excellence objective in building the NPC's School of Horticulture program as a national program of recognition.

Awaji Landscape Planning and Horticulture Academy (ALPHA Academy), Hyogo, Japan	Exchange program allows Japanese students to attend NPC's School of Horticulture for advanced study and an opportunity for NPC students to seek internship placements in Japan.	Supports corporate excellence objective in building NPC's School of Horticulture program globally.
National Association of Landscape Professionals (NALP), United States	This governing body of the landscape industry for North America has accredited NPC's School of Horticulture program as being the equivalent of a four-year bachelor degree program.	Supports Corporate Excellence objective in building NPC's School of Horticulture program as a national program of recognition.
City of Niagara Falls	Schools in Bloom program – NPC's School of Horticulture students actively participate in a consultative capacity with all high schools in the City to beautify school properties and engage young people in horticulture.	Supports corporate excellence objective and demonstrates commitment to natural and cultural stewardship.
Niagara Catholic District School Board	This partnership allows high school students enrolled in horticulture and a high skills major program in horticulture to complete their studies at the Botanical Gardens with a hybrid teaching model using class lectures with studies in the gardens and working with NPC's students.	Supports growth of NPC's diploma program through enhanced reach to potential future students and increases applicants to program.
Canadian Wildlife Federation	Memorandum of understanding developed to enable collaborative activities between NPC and Canadian Wildlife Federation with a focus on education.	Supports development of NPC's educational programming for NPC's staff, students and visitors. Provides access to experts in horticulture, forestry and conservation. Further opportunities for ecological restoration and research.

Canadian Garden Council	Continued support as founding member to increase promotion of NPC, the Botanical Gardens, the School of Horticulture and other Canadian gardens and tourism experiences, education opportunities and to cultivate joint marketing strategies.	Provides opportunity for joint marketing initiatives and access to resources from participating members. Requires further study to develop staffing plan.
Master Gardeners of Ontario, Garden Club of Niagara and Horticulture Society of Niagara Falls	Partnership to provide learning opportunities to visitors, students and members to advance awareness and education (agreement to be developed).	Supports growth and development of the visitor experience at the Botanical Gardens and creates other revenue opportunities for the partners.
School of Horticulture Alumni Association	Promote and support NPC's School of Horticulture, its current students and alumni.	NPC staff liaise with the Alumni Association supported by its terms of reference.

## 13. COMMUNICATION PLAN

In 2019, Corporate Communications will continue to support and implement NPC's key strategic priorities identified in the 10-Year Strategic Plan and this Business Plan. In so doing, communications efforts will be aligned and positioned to support the overall strategic directions identified and promoted by the provincial government and the MTCS.

### 2019 Business Goals

- Provide external and internal communications support to NPC's diverse operational units and revenue-generating departments;
- Support NPC's efforts in both its brand management and reputational objectives thereby enhancing NPC's overall image and financial performance;
- Initiate the creation of a new corporate communication plan, in support of NPC's 10-Year Strategic Plan objectives and brand initiative, to further NPC's corporate objectives and reputation;
- Support NPC's change management initiatives as required for the implementation of the 10-Year Strategic Plan;
- Build internal communications efforts and capabilities in support of NPC's various departmental units and corporate communications objectives.

### 2019 Communications Goals

- Continue to build awareness and support among key stakeholder groups for the Strategic Plan and the resulting capital/program priorities to be pursued;
- Support the continued implementation of NPC's brand and wayfinding initiative;
- Increase awareness and understanding of NPC as a provincially and nationally significant tourism asset with the goal of making NPC, not only one of the most respected parks agencies in Canada, but also ***one of the most spectacular Parks in the world***;
- Continue to enhance and strengthen the relationship between NPC and its identified stakeholders, ensuring NPC's vision, mission, economic importance and Strategic Plan are shared with and understood by these important stakeholder groups, including employees, elected representatives and the general public;
- Manage issues to continue to build and enhance the corporate reputation of NPC; and,
- Provide strategic communication support to key NPC initiatives in 2019 including: redevelopment work scheduled for Table Rock Centre; adaptive re-use of the power plants; future plans for Niagara Parks Marina at Miller's Creek;

environmental and cultural stewardship initiatives; implementation of the Queen Victoria Park Master Plan; support for the 2019 employee survey; and support contract discussions between NPC and two employee groups – OPSEU Local 217 (police employees) and Workers United Canada Local 2347 (restaurant servers).

### 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 Niagara region;
- Tourism organizations such as Niagara Falls Tourism, Tourism Partnership of Niagara, the Scotiabank Convention Centre, local BIAs, Destination Ontario, Destination Canada, the Travel Industry Association of Canada, the Travel Industry Association of Ontario, Attractions Ontario, Culinary Tourism Alliance, attraction operators, local hoteliers, and golf course operators;
- Local, national and international media;
- Tourism visitors.

### Success Factors

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

#### Advance preparation and a proactive approach

Advance preparation and a proactive approach to communications, issues management, and event plans, including key messages, target audiences and tactics is needed to ensure maximum exposure and coverage of NPC activities. This will be further enhanced through the development of a new corporate communications plan.

#### Consistency

Consistency in delivering key messages is fundamental to the success of all corporate communications. The Chair, CEO and other designated spokespersons must be able to effectively deliver on key messages outlined in various communications throughout the year.

To ensure consistency, key messages in issues/communications/event plans will be shared in advance with the Chair and senior staff who may be required to speak to a

matter. Information will also be shared with Commissioners and senior staff as they may be expected to use and deliver these key messages when discussing NPC business/activities with stakeholders and others.

### Internal/Employee Communications

NPC is one of the largest employers in Niagara region. Commitment to internal communications ensures employees have accurate information about any current and/or future activities to be pursued by NPC for sharing with family, friends and associates in the community and region. Internal communications will continue to emphasize the vision and objectives of this Business Plan and the corporate initiatives in the Strategic Plan.

Many of the Strategic Plan's initiatives will require change management strategies which will include communications support and plans, especially when an initiative has a direct impact on staff (e.g. venue change, process change, skill change, role change, etc.).

On successful change management, Jeffrey M. Hiatt, in his book ADKAR: a model for change in business, government and our community, states:

"The ADKAR model has five elements that define the basic building blocks for successful change:

1. "Awareness
2. "Desire
3. "Knowledge
4. "Ability
5. "Reinforcement

"...ADKAR is an individual change management model...[It] represents the essential elements of change for a single person. When a group of individuals experience change, ADKAR can be used...[as] a coaching tool...[to] guide change management activities...[and to] diagnose a struggling change...When the ADKAR elements are achieved, employees become engaged and energized. The change is adopted faster."

Employee communications will highlight several corporate initiatives being pursued this year such as: the redevelopment of Table Rock Centre; implementation of NPC's brand and wayfinding strategy; development and implementation of the Queen Victoria Park Master Plan; implementation of an online job Applicant Tracking Process system; implementation of an Enterprise Content Management System; and, the opportunity to

build on the positive momentum generated from the results of the 2016 NPC's employee survey when a new survey is undertaken in the summer of 2019.

Corporate Communications will also assist in the employee communications strategies/activities required to support NPC's senior staff in reaching mutually beneficial contract agreements with two of its unionized employee groups, OPSEU Local 217 (police employees), and Workers United Canada Council Local 2347 (restaurant servers).

### Communications Protocol with MTCS

While NPC has primary responsibility for communicating decisions/activities, existing ministry/agency protocols with respect to issues management and communications must be followed. With the formation of the new government, the MTCS will need to be apprised of significant public matters and asked to provide input with respect to key messages and speaking points.

### Media Training

Training for authorized media spokespersons involves formal media training sessions that review how the media operates, what information is often requested and practice/mock interviews. These sessions may serve to refresh those who have had some media training in the past.

### Commitment to Transparency

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

## Tactics

### Media Relations

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



Earned media coverage through public relations activities supplements advertising buys, maintains the profile of NPC in major tourism markets and helps open new markets internationally and domestically. Over the first 10 months of the calendar year, NPC's public relations and media relations activities generated an estimated \$21 million in public relations value.

2019 media relations activities will include:

- Developing 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 to promote Niagara Parks and provide reasons for guests from Canada, the U.S. and international markets to visit and/or return to Niagara Parks;
- Facilitating editorial board meetings and media interviews for the Chair and CEO;
- Updating and increasing corporate communications content on NPC's digital platforms (e.g. corporate website, engagement centre and social media channels);
- Increasing awareness of the role and importance of NPC as a provincial and national treasure;
- Promoting Niagara Parks as *one of the most spectacular Parks in the world*.

### Internal Employee Communications

In 2019, internal communications will play a vital role in ensuring all employees have accurate information about future directions/decisions made and the reasons behind those decisions. To achieve this, NPC will continue to promote communications vehicles designed to foster ongoing dialogue and positive engagement between staff and management, including utilizing communication vehicles such as:

- The employee newsletter;
- Change management employee updates and specific communication plans developed in support of strategic plan projects/programs of significance
- Memos/bulletins/all users communications from the Chair and/or CEO which have proven to be valuable in communicating important information to staff immediately and unfiltered, on issues of critical importance to NPC
- Launch of newly enhanced employee website with all relevant policies, issues and happenings within Niagara Parks, including the bi-weekly "NPC Network"
- Continued support for employee recognition events (United Way, Retirement Dinner/Employee Awards/Christmas Luncheon/Staff Golf tournament)

- On a bi-annual basis, the Chair and CEO will meet with NPC employees in a town hall format to share information on various topics, including NPC's overall financial performance and strategic plan and objectives for the future
- Continue holding smaller, more informal group discussions between management and staff on a departmental basis to receive individual concerns and issues faced by employees. These meetings will be critically important to the success and eventual creation of departmental action plans to flow as a result of the 2019 employee survey
- Executive Team visits to all work sites

### Stakeholder Outreach Initiatives

Board and public meetings held with residents and municipal councils over the past several years have been successful in demonstrating NPC's commitment to openness and transparency. In 2019, these initiatives will continue and include presentations to local municipal councils/public provide information on NPC's operations, economic importance and the important role NPC 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 NPC such as:

- Priorities/programs resulting from the Strategic Plan
- Queen Victoria Park Master Plan
- Future reuse scenarios of the former power plants
- Development of new programs - reaching out to stakeholders, soliciting feedback on creation of new event plans, as well as Indigenous tourism and cycling strategies
- Continuation of open Board meetings and public information centres throughout the year
- Hosting an annual accessibility consultation with members of the public to discuss NPC's ongoing efforts in implementing its multi-year accessibility plan, a requirement under the provincial government's Accessibility for Ontarians with Disabilities Act

NPC will also continue to take a 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, staff also provide regular briefings with organizations such as Destination Ontario, Destination Canada, the Tourism Industry Association of Canada and the Tourism Industry

Association of Ontario to better promote NPC, its goals and its importance to the tourism sector. NPC's continued relationship with these organizations is threefold:

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

### Provincial Government Outreach

As a provincial agency, NPC has several reporting mechanisms including a Memorandum of Understanding with the MTCS, business plan, annual report, and issues notes designed to inform and ensure its accountability to the Province of Ontario. In 2019, NPC will continue with initiatives to increase awareness and understanding of NPC, its mandate, vision and importance, including briefings and meetings with the Minister, Deputy Minister, MPPs and MPs in support of projects and initiatives of importance to NPC and Niagara region.

### Social Media

The content developed for pitches/releases/advisories written for the mainstream media will be repurposed for NPC's website and distributed to bloggers and freelance writers. Information on key projects will be shared via NPC's public Engagement Centre to raise awareness and to solicit public feedback on key projects.

Photography and video continue to be used whenever possible in media relations activities and in social media initiatives. Videos are posted on NPC's website and social media sites such as YouTube, Instagram and Facebook.

### Speaking Opportunities

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

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 Niagara Parks.



#### [NPC Website](#)

Detailed information is posted on NPC's English and French language websites to ensure continued openness and transparency with the public. NPC will continue to enhance these websites, the marketing site and new public Engagement Centre to promote NPC and increase visitation and sales.



