

The Niagara Parks Commission – Three Year Business Plan

April 1, 2016 – March 31, 2019



NPC - Three Year Business Plan

February 20, 2016

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1.0 EXECUTIVE SUMMARY

The Niagara Parks Commission (NPC) was created in 1885 as a result of the Ontario Government wishing to seek “the public good” in balancing public and private interests in management of one of the great “Wonders of the World”. Many of the issues of balancing preservation of vistas, natural and architectural heritage against the pressures of sustainability remain. As an agency of the Ontario Government, NPC is one of the longest-standing agencies of the province with a proud history of service to the public.

The Niagara Parks Commission continues as one of the key drivers of economic prosperity and tourism in the Region. The Commission therefore is required to continuously adapt to societal and financial changes, while preserving reasonable access to NPC facilities and services.

NPC continues to steward a great internationally known icon – the Niagara Falls and 56 kilometres of adjoining parkland, traversing three local municipalities within the Region of Niagara. Ontario’s Economic and Fiscal Review in November 2015 points to positive signs that Ontario’s economy is gaining momentum, supported by the resurgence in the U.S. economy. The global economic environment remains challenging and NPC cannot depend on the US and international traveler for incremental new revenues. There will be a continued focus on the domestic traveler and creating value and reasons for repeat visits especially from GTA visitors who now make up a majority of visitors. Tourism infrastructure investments are required for Niagara to remain competitive and offer a diversity of products/services to meet the needs of visitors. NPC must focus more on the visitor, including understanding motivation for visits and length of stay, as well as meaningful elements of desired experiences.

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

NPC’s mandate will be carried out with a continued emphasis on our Values:

- Transparency and accountability
- Cooperation and collaboration
- Innovative practices
- Responsiveness and sensitivity
- Diversity

Employees will be fully engaged in our vision: *Ontario Niagara Parks – PRESERVING a rich heritage, CONSERVING natural wonders, INSPIRING people, worldwide!*

To achieve this vision, each business area has detailed work plans and outputs that support a balanced portfolio using seven critical foci in its strategy and emphasizing use of benchmarking, best practices and continuous improvement. These foci are as follows:

- FINANCE – Align financial resources to efficiently deliver products and services
- HUMAN RESOURCES – Create an operating culture in which innovation is encouraged
- PRODUCTS & SERVICES – Deliver a wide range of educational, recreational and environmental tourism opportunities
- FACILITIES & TECHNOLOGY – Maintain state of the art infrastructure and equipment
- IMAGE – Generate interest and excitement in the NPC Brand

- PARTNERSHIPS – Negotiate and maintain mutually beneficial operating partnerships and
- RESEARCH & DEVELOPMENT – Ensure that Commission and administrative decisions are evidence based

Achievement of a positive financial position is one of the objectives identified in NPC's 2013-2017 Strategic Plan and NPC will meet this objective in its 2016 fiscal year.

For the year ended March 31, 2016, NPC is projecting a surplus in its operating results of \$3.255 million. This is a positive variance of \$4.701 million from budget. Highlights of the financial results for NPC projected for the year ended March 31 and the budget for fiscal years 2017 through 2020 are summarized in Table 1.1 below. NPC does not receive operating grants from the Province. From time to time, NPC receives capital grants from the Province.

	CURRENT FISCAL YEAR			FUTURE YEARS			
	BUDGET	PROJECTION	VARIANCE TO BUDGET	BUDGET			
	Apr. 2015 Mar. 2016	Apr. 2015 Mar. 2016	Apr. 2015 Mar. 2016	Apr. 2016 Mar.2017	Apr. 2017 Mar.2018	Apr. 2018 Mar.2019	Apr. 2019 Mar.2020
<i>(in thousands of dollars)</i>							
Revenue Producing Operations	\$ 67,051	\$ 73,622	\$ 6,571	\$ 73,088	\$ 74,550	\$ 76,041	\$ 77,712
Land Rent - Ontario Power Generation	\$ 6,899	\$ 6,913	\$ 14	\$ 6,997	\$ 7,102	\$ 7,209	\$ 7,317
Commission Rentals & Fees	\$ 174	\$ 125	\$ -49	\$ 154	\$ 157	\$ 160	\$ 163
Boat Tour Revenue	\$ 12,725	\$ 12,725	\$ -	\$ 13,035	\$ 13,342	\$ 16,002	\$ 12,625
Zipline	\$ -	\$ -	\$ -	\$ 1,292	\$ 2,083	\$ 2,125	\$ 2,168
Sundry	\$ 525	\$ 1,160	\$ 635	\$ 835	\$ 850	\$ 850	\$ 850
Total Revenue	\$ 87,374	\$ 94,545	\$ 7,171	\$ 95,401	\$ 98,084	\$ 102,387	\$ 100,835
Expenses							
Revenue Producing Operations							
Cost of Goods Sold	\$ 11,207	\$ 12,601	\$ 1,394	\$ 12,008	\$ 12,375	\$ 12,623	\$ 12,900
Operating Expenses	\$ 35,730	\$ 36,284	\$ 554	\$ 36,965	\$ 38,153	\$ 38,916	\$ 39,772
Horticulture	\$ 9,391	\$ 9,336	\$ (55)	\$ 9,699	\$ 9,893	\$ 10,091	\$ 10,293
Engineering	\$ 5,897	\$ 6,125	\$ 228	\$ 6,255	\$ 6,380	\$ 6,508	\$ 6,638
Police and Administration	\$ 13,285	\$ 13,779	\$ 494	\$ 13,670	\$ 13,927	\$ 14,187	\$ 14,453
Group Sales	\$ 1,490	\$ 1,348	\$ (142)	\$ 1,356	\$ 1,376	\$ 1,397	\$ 1,418
Marketing	\$ 2,106	\$ 2,229	\$ 123	\$ 2,518	\$ 2,556	\$ 2,594	\$ 2,633
Total Expenses	\$ 79,106	\$ 81,702	\$ 2,596	\$ 82,471	\$ 84,660	\$ 86,316	\$ 88,107
Net Surplus/Deficit Before Interest & Depreciation	\$ 8,268	\$ 12,843	\$ 4,575	\$ 12,930	\$ 13,424	\$ 16,071	\$ 12,728
Loan Interest	\$ 1,646	\$ 1,596	\$ (50)	\$ 1,513	\$ 1,426	\$ 1,331	\$ 1,228
Amortization of tangible capital assets	\$ 8,728	\$ 8,652	\$ (76)	\$ 9,032	\$ 9,070	\$ 9,070	\$ 9,070
Amortization of deferred capital funding	\$ (1,365)	\$ (1,365)	\$ -	\$ (1,670)	\$ (1,670)	\$ (1,670)	\$ (1,670)
Net increase in Power Plant Obligation	\$ 705	\$ 705	\$ -	\$ 705	\$ 705	\$ 705	\$ 705
Net surplus/(deficit)	\$ (1,446)	\$ 3,255	\$ 4,701	\$ 3,350	\$ 3,893	\$ 6,635	\$ 3,395

For 2017–2020, the revenue and expense forecast has been prepared based on attendance for the previous three years, expected revenues from the boat tour operation, revenues from the Zip Line Program which commences in 2016, and other assumptions as outlined in Section 10.

Following are the highlights of some of the key accomplishments of NPC during 2015/2016, categorized by strategic focus element:

Research & Development

- Completed in Park Surveys of visitors for the third year as part of NPC's market research

Human Resources

- Implemented an electronic applicant tracking system to accept and process resumes for recruitment purposes

- Implemented a new Learning Management Training System to support upskilling and effective tracking of training (Live February 2016)
- Negotiated two four year labour agreements

Partnerships

- Provided a welcome to the Pan Am/ Parapan Games participants through active programming that embraced the cultures of those participating in the Games,
- Implemented a replanting program with Trees Ontario
- Participated with Golf Canada/PGA in 'Growing the Game' (Special Olympics, Junior Golf)
- Hosted Rendez-vous Canada, Association of Municipalities of Ontario (AMO) and Canadian Urban Transit Association (CUTA)
- Worked closely with Winter Festival of Lights to bring new programming to fruition

Image

- Enhanced Mobile Device access/WiFi Guest Access in the vicinity of Grandview Plaza and Table Rock
- Initiated a new multi-attraction pass, with Adventure Pass 'Plus' Spring Launch

Products and Services

- Constructed improvements to Journey Behind the Falls and the Incline Lower Plaza
- Conducted a competitive procurement process to update Falls Illumination technology
- Obtained 'Feast-On' Certification for NPC culinary offerings
- Expanded the late summer Onguiarra Sound & Light Show
- Obtained Order in Council (OIC) approval and signed the agreement with Niagara Adventure Excursions (NAE) to construct a Zip Line attraction and Aerial Adventure Course, for opening in 2016.

Finance

- Achieved a bottom line surplus – the first surplus since the 2005 fiscal year
- Secured new Pay & Display Parking
- Procured new technology for payroll, timekeeping and Human Resources Information Systems, for implementation

Facilities & Technology

- Renovated existing NPC facilities to accommodate administrative staff from the leased facility at Dunn Street
- Completed \$1.659 million in funded improvements to NPC facilities which were identified as 'critical' in NPC's asset condition database (AMIS)
- Commenced improvements to Oakes Garden Theatre
- Commenced the formal process for redevelopment of NPC Marina at Miller's Creek
- Developed Project Charter, began update and consolidation of existing studies to produce baseline information and conducted visioning sessions in preparation for procurement processes to redevelop the three historic generating stations on NPC property

The following key priorities for 2017 - 2019 are outlined below, categorized by strategic focus element:

- Position NPC as a worldwide Park experience and strengthen our global identity and brand
- Grow revenue sources to \$100 million per year by 2019 (\$125 million by 2025) to sustain operations well into the future
- Make further investments in systems, technology, infrastructure and people
- The following key projects are identified:
 - Attraction Renewal: Zip Line, Aerocar, Table Rock, Butterfly Conservatory, Illumination Tower

- Commence first year of multi-year Masterplan Development (2016: Queen Victoria Park Area)
- Develop strategy for modernization and integration of Point of Sale and revenue related technology (retail, attraction, culinary and golf) and commence procurement of attraction ticketing technology replacement
- Address urgent refurbishment of facilities and equipment, including boilers, chillers, water mains and windows
- Police Radio Replacement project, in partnership with Niagara Regional Police
- Complete renovations to administrative facilities to replace leased facilities
- Procurement for redevelopment of NPC Marina at Miller's Creek
- Complete baseline information consolidation, World Café visioning process and redevelopment strategy for heritage power generating facilities
- Continue with brand development strategy

These current and forthcoming projects and activities are more fully described in Section 4 of this Business Plan, and implementation plans for these projects are outlined in Section 13. Resources are available to implement these priorities in NPC's operating and capital budgets.

A prioritized and strategic capital plan self-funded from operations is vital to NPC's fiscal health. NPC's capital plan of \$9.06 million is prioritized and based on funding available from operations. NPC recognizes the importance of long term asset planning and has incorporated an analysis of asset condition, forecasted needs and replacement strategy in Section 10 of this Business Plan.

These priorities align with the Ministry of Tourism, Culture and Sport's vision to strengthen the economy and help stimulate economic growth. As NPC implements the priorities in this business plan, NPC will continue to maintain fairness in the implementation of the Boat Service Lease and Operating Agreement with Hornblower Niagara Cruises, which commenced on January 1, 2014. NPC will maintain transparency with the Miller's Creek marina redevelopment project and will progress with studies to update the condition assessments of the obsolete generating stations.

2.0 MANDATE

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

The Niagara Parks Act

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

Founding Principles

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

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

Agencies and Appointments Directive

NPC operates within the accountability framework of the Province as set out in the 2015 "Agencies and Appointments Directive". This Directive outlines the various accountability mechanisms that are to be established between an agency and its relevant Ministry. Included in this is the development of a Memorandum of Understanding, and the submissions of Annual Reports, the Annual Multi-Year Business Plan and Quarterly Risk Assessments, a requirement for external audits to be completed and procedures for financial reporting and periodic reviews that will take place.

In accordance with this Directive, NPC has been classified as a Board-Governed Provincial Agency of the Ministry of Tourism, Culture and Sport. A Board-Governed Agency is an Agency that has the financial and operating authority to carry on a business with revenues received from its commercial activities. NPC is further categorized by the Ministry of Finance as an *Other Governmental Organization*, which "...maintains its operations and meets its obligations from revenues generated outside of the government reporting entity." NPC is required to report financial information to the Ministry of Finance and its operations are included in the Province's summary financial statements.

Operational Enterprise Classification

NPC's classification as an Operational Enterprise board-governed provincial agency affirms the Government's intent and expectations for NPC to pursue sound fiscal management strategies. By operating its own commercial facilities and by negotiating partnership agreements with others, NPC has been able to generate the profits necessary to fulfill its self-sufficiency principle and its significant stewardship responsibilities.

Stewardship

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

As well, by structuring NPC as an economically self-sufficient organization reporting to the Ministry of Tourism, Culture and Sport with oversight and control placed in the hands of an appointed Board, NPC effectively operates for the benefit of the people of Ontario.

Mission Statement

It is important that the mission of Niagara Parks is consistent with the mandate which is contained in the Niagara Parks Act. The mission must recognize the location of the mandate (i.e. along Niagara River), for whom the mission is fulfilled (the visitors), and the accountability in fulfilling the mission (financial self-sufficiency).

Niagara Park's mission is to protect the natural and cultural heritage along the Niagara River for the enjoyment of visitors while maintaining financial self-sufficiency.

The vision of NPC is as follows:

Ontario's Niagara Parks – PRESERVING a rich heritage, CONSERVING natural wonders, INSPIRING people, worldwide!

The catch phrase of NPC has become – preserving, conserving, inspiring. These are the evaluative criteria for the initiatives and means by which NPC fulfills its duties.

This catch phrase is reinforced by the visuals which were adopted in 2011 – four images which capture the essence of NPC. These visuals are used throughout the park, in its print material, on its website, and in the signature of NPC emails.



Part of the Ministry of Tourism, Culture and Sport's mandate is to play a central role in attracting investment and international visitors to the Province. The Ministry vision is to work with the tourism and culture sectors to strengthen Ontario as an internationally recognized tourism destination.

NPC supports the Ministry's vision by undertaking market research and product development and by actively promoting Niagara in Canadian and international markets through its many partnerships.

NPC encourages private sector development and new product development to expand Ontario's tourism sector. In 2012, the finalization of a new Boat Tour agreement with Hornblower Canada is an example of encouraging private sector investment to attract new visitors and enhance the visitor experience. In 2016, NPC will implement a new Zip Line Attraction Program built and managed by its private sector partner, Niagara Adventure Excursions (NAE).

Events, exhibits and golf tournaments are regularly held to increase visitation to Niagara Parks and the Niagara Region. NPC works with regional hotel properties to increase overnight stay through affiliate programs that cross-sell products such as the Adventure Pass program, golf stay & play, weddings and numerous events and exhibits. NPC has staff dedicated to marketing, sales and event coordination.

Examples of annual exhibits and events which result in a significant influx of visitation to Niagara Region include the New Year's Eve event (estimated attendance of 35,000 to 60,000 people) and the annual Festival of Lights celebrating 33 years of operation in the 2015-2016 winter season.

NPC continues to support and integrate with the marketing efforts of the Regional Tourism Organization (RTO) for out-of-destination advertising support within the GTA, other Ontario and near U.S. markets. This will support the Ministry's responsibility to "support the delivery and marketing of high-quality tourism experiences".

3.0 STRATEGIC DIRECTIONS

NPC's achievements in 2015/2016 and focus in the 2016-2019 Business Plan support the priorities of the Ministry of Tourism, Culture and Sport through several initiatives. These include market research and brand development, response to international tourism trends, renewal of NPC's existing tourism attractions and launch of new attractions, preservation and enhancement of heritage assets and collaboration with the local community through participation in marketing partnerships. Progress continues on the redevelopment of NPC's Marina at Miller's Creek, with the Market Study, Community Consultation process, Request for Information procurement process and a recommendation on the preferred development scenario to be completed in the first quarter of 2016. A competitive procurement process is to be conducted in 2016, followed by approval of the preferred proponent. During 2015/2016, NPC approved a project charter for redevelopment of NPC's three historic power generating buildings, which defines steps and timelines consolidating relevant information about each building, site and infrastructure, in preparation for competitive procurement processes, and redevelopment. An internal visioning process has been conducted, and a 'World Cafe' visioning process, of internal and external stakeholders is scheduled for 2016.

NPC has identified seven areas of strategic focus that it considers to be critical to its continued success, which are illustrated in Table 3.1. On April 26, 2013, NPC's Board adopted a new Strategic Plan which also references these seven focus areas. These focus areas are as follows:

- FINANCE – Align financial resources to efficiently deliver products and services
- HUMAN RESOURCES – Create an operating culture in which innovation is encouraged and rewarded
- PRODUCTS & SERVICES – Deliver a wide range of educational, recreational and environmental tourism opportunities
- FACILITIES & TECHNOLOGY – Maintain state of the art infrastructure and equipment
- IMAGE – Generate interest and excitement in the NPC Brand
- PARTNERSHIPS – Negotiate and maintain mutually beneficial operating partnerships
- RESEARCH & DEVELOPMENT – To utilize evidence-based information to continuously improve our quality and to proactively apply best practices

In addition to the seven focus areas, the goals of positive engagement, asset renewal, as well as service and program enhancement and several key initiatives to support these goals are included in this Business Plan, summarized below:

2015/2016 Strategic Initiatives and Achievements

Research & Development

- Completed in Park Surveys of visitors for the third year as part of NPC's market research

Human Resources

- Implemented an electronic applicant tracking system to accept and process resumes for recruitment purposes
- Implemented a new Learning Management Training System to support upskilling and effective tracking of training (Live February 2016)
- Negotiated two four year labour agreements

Partnerships

- Provided a welcome to the Pan Am/ Parapan Games participants through active programming that embraced the cultures of those participating in the Games, participating in the Torch Relay, the Ontario Media Attraction Pass, pageantry at the Falls Incline Plaza and flower beds, themed exhibits at the Floral Showhouse, themed menus from participating countries and special stage performances
- Implemented a replanting program with Trees Ontario
- Participated with Golf Canada/PGA in 'Growing the Game' (Special Olympics, Junior Golf)
- Hosted Rendez-vous Canada
- Hosted Association of Municipalities of Ontario (AMO) and Canadian Urban Transit (CUTA) conference study tours
- Worked closely with Winter Festival of Lights to bring new programming to fruition

Image

- Enhanced Mobile Device access/WiFi Guest Access in the vicinity of Grandview Plaza and Table Rock
- Initiated a new multi-attraction pass, with the Adventure Pass 'Plus' Spring Launch

Products and Services

- Constructed improvements to Journey Behind the Falls and the Incline Lower Plaza
- Conducted a competitive procurement process to update Falls Illumination technology
- Obtained 'Feast-On' Certification for NPC culinary offerings
- Expanded the late summer Onguiarra Sound & Light Show
- Obtained Order in Council (OIC) approval and signed the agreement with Niagara Adventure Excursions (NAE) to construct a Zip Line attraction and Aerial Adventure Course, for opening in 2016

Finance

- Achieved a bottom line surplus – the first surplus since the 2005 fiscal year
- Secured new Pay & Display Parking supplier
- Procured new technology for payroll, timekeeping and Human Resources information Systems, for implementation
- Recruited professional Records Manager to assist with required modernization of NPC's management of records

Facilities & Technology

- Renovation of existing NPC facilities to accommodate administrative staff from the leased facility at Dunn Street.
- Completed \$1.659 million in funded improvements to NPC facilities which were identified as 'critical' in NPC's asset condition database (AMIS)
- Commenced improvements to Oakes Garden Theatre
- Commenced formal process for redevelopment of NPC Marina at Miller's Creek
- Developed Project Charter, began update and consolidation of existing studies to produce baseline information and conducted visioning sessions in preparation for procurement processes to redevelop the three historic generating stations on NPC property

Environmental Scan

NPC continues to steward a great internationally known icon – the Niagara Falls and 56 kilometres of adjoining parkland, traversing three local municipalities within the Region of Niagara. Ontario's Economic and Fiscal Review in November 2015 points to positive signs that Ontario's economy continues to gain momentum, supported by the resurgence in the U.S. economy.

The global economic environment remains challenging and NPC cannot depend solely on U.S. and international visitation increases for incremental new revenues. Continued focus on the domestic traveler by creating value and reasons for repeat visits especially from GTA visitors is required in order for Niagara to remain competitive with a diversity of products/services to meet needs of visitors. NPC must focus more on the visitor, including understanding motivation for visits and length of stay, as well as meaningful elements of desired experiences.

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

2016 – 2019 Strategic Focus

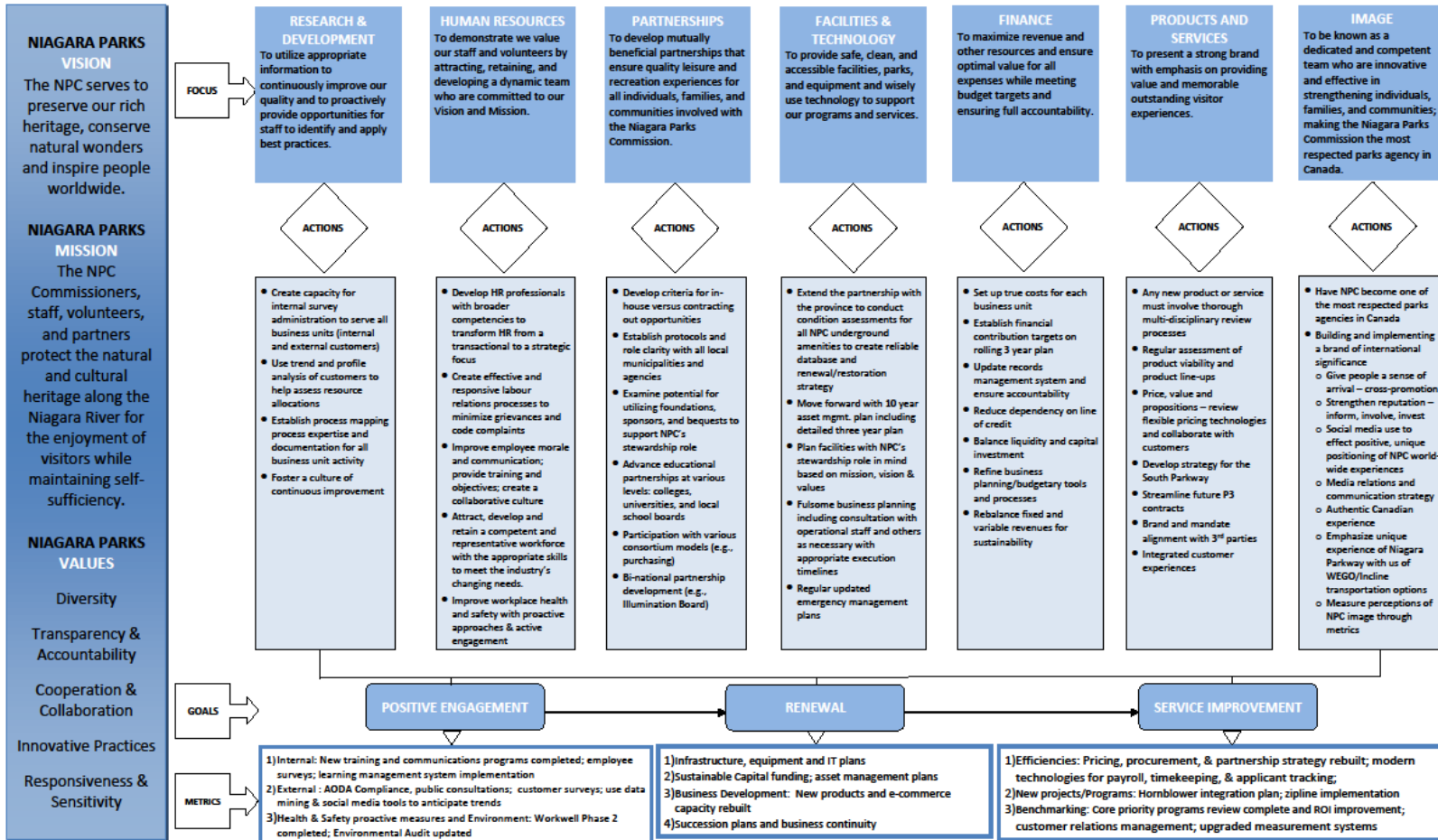
NPC's 2016-2019 Strategic Plan recognizes the need for NPC to reposition itself, to refine its image, define its core business, align to its original mandate, address significant trends in tourism and to capitalize fully on its assets. The following key priorities for 2016 - 2019 are outlined below, categorized by strategic focus element:

- Position NPC as a worldwide Park experience and strengthen our global identity and brand
- Grow revenue sources to \$100 million per year by 2019 (\$125 million by 2025) to sustain operations well into the future
- Make further investments in systems, technology, infrastructure and people
- The following key projects are identified:
 - Attraction Renewal: Zip Line, Aerocar, Table Rock, Butterfly Conservatory, Illumination Tower
 - Commence first year of multi-year Masterplan Development (2016: QVP Area)
 - Develop strategy for modernization and integration of Point of Sale and revenue related technology (retail, attraction, culinary and golf) and commence procurement of attraction ticketing technology replacement
 - Address urgent refurbishment of facilities and equipment, including boilers, chillers, watermains and windows
 - Police Radio Replacement project, in partnership with Niagara Regional Police
 - Complete renovations to administrative facilities to replace leased facilities
 - Procurement for redevelopment of NPC Marina at Miller's Creek
 - Complete baseline information consolidation, World Café visioning process and redevelopment strategy for heritage power generating facilities
 - Continue with brand development strategy

These current and forthcoming projects and activities are more fully described in Section 4 of this Business Plan, and implementation plans for these projects are outlined in Section 13. Resources are available to implement these priorities in NPC's operating and capital budgets.

Table 3.1 Strategic Focus

**THE NIAGARA PARKS COMMISSION
2016 – 2018 STRATEGIC FOCUS**



4.0 OVERVIEW OF CURRENT & FORTHCOMING ACTIVITIES/ PROGRAMS

The 2016 – 2019 Business Plan reflects the results of the Strategic Plan update that was approved in April 2013. The programs and activities outlined within this section are a continuation of projects underway during 2015/2016 and new initiatives for the 2016–2019 planning period. While numerous strategic initiatives are highlighted in Section 3, this section provides additional details on the most significant projects. This section also provides details on upcoming Revenue Generating Opportunities (RGO's) within the planning period.

Attraction Renewal

During 2016/2017, NPC will undertake planning and investigation to revitalize several of its attractions:

Aerocar 100th Anniversary (Cost \$200k; completion date May 2016):

The scope of work includes both capital work and anniversary programming for visitors. The Aero Car will undergo its five year major maintenance over the winter of 2015-16. Staff are also completing a feasibility study to make the 100 year-old attraction accessible for accessibility-challenged visitors. NPC will continue to seek additional accessibility funding for this purpose.

Other site improvements planned include refurbishment of washrooms, food service seating area, on-site signage, group entrance and other site amenities. For programming, there will be a 100 day commemoration planned to mark the attraction's centennial, running from July 1 to Thanksgiving Day, 2016. The special anniversary date will be August 8, 2016, the official 100th anniversary date. Displays and interpretive information will be incorporated into NPC marketing and at other NPC locations, including the Welcome Centre at Table Rock. In support of the commemoration, NPC Culinary Services will develop themed menus, NPC retail will offer special anniversary merchandise and NPC Horticulture will showcase an Aero Car design into its Floral Clock display in 2016.

Table Rock – Redesign Grand Hall Welcome Centre (Budget: \$125k; Completion Date: December 2016)

The scope of this project is to remove the existing Welcome Centre reception area near the escalators at Table Rock and to re-position the Welcome Centre to the outer perimeter of Table Rock. The objective is to address health & safety concerns related to noise and congestion and to improve the visitor experience by opening up the flow of traffic in this area.

Butterfly Conservatory: (Budget: \$85k; Completion Date: December 2016)

This capital project is to renovate the exhibit area and the open space gathering area at the front entrance of the Butterfly Conservatory. The spaces will be designed to be multipurpose, in order to expand product and service opportunities at the Botanical Gardens and Butterfly Conservatory. The long term goals of the multipurpose design of the space will enhance the ability to provide spaces equipped with excellent sound and audio capabilities to support development of new and engaging programs; replace existing educational exhibits to enhance the visitor experience through the use of new technology, as well as create exhibits with a flexible footprint; meet the special and technical requirements of seasonal exhibits that promote a memorable experience; create a unique venue experience for rentals such as weddings, corporate events, and other

partnership opportunities and re-create; improve upon culinary opportunities and address storage issues to accommodate cross functional needs.

Illumination Tower (Cost \$4 million to be funded by others; completion date December 2016): Working with the Bi-National Illumination Board, NPC is investigating the feasibility of substantial lighting improvements for the American and Horseshoe Falls. The existing lighting system is deemed dull and old, dating back to use of World War II searchlight luminaire housings (75 years old), with the last substantial bulb upgrades dating back to 1998. A competitive procurement process commence in 2015, conducted by NPC on behalf of the Illumination Board, seeking a qualified firm to design, construct and implement a technology solution that will enhance the overall illumination of both the Canadian Horseshoe and American Falls. The Selected Proponent will be required to manage all aspects of the project from start to completion. During 2015/2016, funding from the partners will be secured with construction commencement planned in 2016.

Zip Line Program (2017 Revenue: \$1.29 million; Implementation Date: Spring 2016 Capital costs to be funded by third party operator as part of lease agreement)

Working with Niagara Adventure Excursions (NAE), the successful proponent, identified through a competitive procurement process, NPC has entered into a lease and operating agreement for the operation of a new Zip Line Attraction at the Falls, as well as an Aerial Adventure Course at NPC's Thompson Point location. The lease, which received approval through an Order in Council (OIC) by the Lieutenant Governor on April 22, 2015 for a term commencing October 1, 2015 and ending on March 31, 2026, with one option for the Commission to extend the lease, provided the extended term ends no later than September 30, 2030. The Zip Line and Aerial Adventure Course are scheduled for start-up in Spring 2016, and new revenues of \$1.29 million are included in NPC's March 2017 budget.

Masterplan Development *Cost \$50k operating funds per year over 3 years; first phase completed by August 2016)*

NPC will begin the multi-year process of creating a masterplan to guide NPC park development over the long term. The first phase will focus on a conservation plan in the core area in proximity to Queen Victoria Park. The long term planning document will assist NPC with ensuring consistent principles and a coherent vision is used in any major redevelopment of NPC properties.

Asset Management/Deferred Maintenance

The amount available to fund NPC's capital needs and the prioritization process is identified in Section 10.3. There is a significant gap between funding available through operations, and the cost of addressing deferred capital maintenance. During 2016/2017, NPC will continue the development of a long term asset management plan, including various background studies required to further assess condition of assets, options for restoration and cost estimates. Several projects have been identified to address the most urgent improvements required, based on data contained in the condition assessment database (AMIS) as well as assets which are critical to operations and near the end of useful life. Note that the projects identified below, which are to be funded through grants, will be subject to review and approval by the Province.

Butterfly Conservatory: Chiller Replacement (Budget: \$750k AMIS grant; Completion Date: December 2016)

The chillers at the Butterfly Conservatory are a vital part of this attraction due to the greenhouse environment and are at the end of their expected life cycle. Ongoing costly repairs are continually being completed to maintain these systems and repairing the deterioration of obsolete controls.

The refrigerant used in this system will be replaced with an approved environmentally friendly refrigerant. An energy efficient system with modern controls will increase the efficiency as well as the effectiveness required for this facility and reduce the risk of lost revenue.

This system is a physically large custom system which could not be quickly replaced on an emergency basis if the system were to fail.

This project would include all engineering, including mechanical and electrical design, sourcing of equipment, logistics and installation.

Floral Showhouse: Boilers (Budget \$600k – AMIS Grant; Completion Date: January 2017)

The boiler system at the Floral Showhouse is currently in excess of 40 years old and operating at an efficiency rating of 50% or less. This system operates an average of 10 months per year for the propagation of plants and maintain temperatures in the greenhouses. The physical size and 4 million BTU firing rating will not permit a quick replacement and requires proper design and engineering for the replacement system. An energy efficient system including pumps and controls will drastically reduce energy and repair costs and increase operational efficiency. Energy cost capital incentives are also currently available.

Whirlpool Water Main (Budget \$500k – AMIS Grant; Completion Date: March 2017)

The cast iron water main that extends north from the Whirlpool Rd/Niagara Parkway intersection to the Butterfly Conservatory was recommended for replacement in the early 2000's. Due to the large capital cost, a plan was developed to replace the water main over three (3) phases. The first phase (Whirlpool Road – Whirlpool Golf Clubhouse) was completed in 2008. The second phase (Whirlpool Golf Clubhouse – Whirlpool Work Shed) was completed in 2011. This 3rd and final phase of the project incorporates the remaining length of the water main and service laterals to the Niagara Glen, School of Horticulture facilities, and the Butterfly Café.

The replacement of the water main is a necessary improvement to align with best practices for drinking water supply. It will also provide NPC the opportunity to create a "looped" supply to remove the issue of stagnant water within the end of the line. Both the water main and service laterals are beyond their useful life and have been the source of an increasing number of emergency repairs.

Oak Hall: Windows in main Administration and/or Residence (Budget \$250k; Completion Date: November 2016)

The windows at the Oak Hall administrative offices and at the Oak Hall apartment residences buildings are beyond their usable life cycle and need to be replaced. The windows appear to be original to the building and are falling apart and water infiltration threatens wall and related structures. New windows and associated structure need to be replaced to prevent more water damage to these buildings.

Police Radio Replacement Project (Budget \$350k; Completion Date: June 2016)

The Niagara Parks Police Service (NPPS) is presently operating a Motorola conventional radio system using radio channels. This system has reached both the end of its useful lifecycle and the manufacturer's support cycle. A Voice Radio Communication System is vital to the Service's ability to provide adequate and effective policing and to ensure the safety of our members and the public.

The legacy radio system was purchased in 2003, when The Niagara Parks Commission approved

the capital expenditure of approximately \$500,000 for a new voice radio project for the NPPS. The purchase leveraged the infrastructure of the Niagara Regional Police Service (NRPS) voice radio project of the day. The NRPS project was initiated following a comprehensive tender process and approval from the Regional Municipality of Niagara Police Services Board while working with the Region. Leveraging the Region's efforts made it possible for the Niagara Parks Police Service, through The Niagara Parks Commission, to afford a state of the art voice radio system. The Niagara Parks Police Service is following a similar process of joint procurement with NRPS for a new radio system in 2016/2017.

Space Planning Study—Administrative Facilities *(2016 Budget \$235k; Completion Date: June 2016)*

The project to repurpose a portion of NPC's Distribution Centre and Maintenance Centre buildings for more efficient use of space and additional employee offices is scheduled for completion by June 2016, with funding for design, construction and related telecommunications approved in the 2016 amended capital budget (\$2.45 million). The Niagara Parks Commission is currently leasing 37,000 sq. ft. of office space from Niagara College at an approximate cost of \$162,000 per year and it is envisioned that the renovated Maintenance Centre and Distribution Centre will be an appropriate and sustainable location to replace the Niagara College leased facilities. Included in the 2017 capital budget, is funding of \$235 thousand for construction of Records and Archives storage at the renovated Distribution Centre.

Niagara Parks Marina at Miller's Creek Redevelopment *(2016 Operating Budget for planning studies \$75k; Completion Date: Fall 2016)*

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

During 2015/2016, NPC conducted a market study to consider the full 45 + acre site which includes the Marina, Shoreline and NPC Open Space Lands in the proximity of the Marina. The study investigated marina, commercial, accommodation and residential land uses. Land lease and land ownership options were also reviewed. Development of the Marina is to be based on the following key project principles:

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

A public consultation session was held in the Fall of 2015, and NPC is currently conducting technical studies for Heritage and Archaeological Assessments and consulting with municipal staff. A Request for Information (RFI) procurement process is underway and targeted for completion by December 2015. The primary objectives of the RFI are to:

- Determine the interest of Private Sector Proponents of 3 distinct options relating to redevelopment of varying scope and scale
- Determine the Corporate and individual skill set of potential proponents to undertake the redevelopment
- Understand innovative business models to implement and operate the scenario(s)

Further information is available on NPC's website, niagaraparks.com. A recommendation on the preferred scenario for development, is scheduled for January 2016. The RFQ/RFP process will follow and Commission approval of the preferred proposal is targeted for fiscal 2016/2017.

Throughout the process, NPC will continue to provide daily operations and maintenance of the marina through a third party provider.

Business Rationalization—Finance, Procurement, Human Resources and Technology

During 2016-2018, NPC will continue with the modernization of its technology and Corporate Services support systems as well as the introduction of a Corporate-wide records management initiative. Modernization projects will continue in the areas of Technology, Procurement, Financial Reporting & Budgeting and Revenue Collection, including the Payment Card Industry Data Security Standard (PCI DSS) Compliance, Payroll and timekeeping services & Human Resources data management.

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

During 2015, NPC procured a Software as a Service (SaaS) arrangement with for payroll, timekeeping and Human Resources Information Services, and will be implementing the new technology over a six month period, with a targeted completion date of Fall 2016.

NPC's work on establishing a formal records management program continues, with the recruitment of a professional Records Manager in 2015, and the anticipated construction of new Centralized Records Storage Facilities at the Distribution Centre location. During 2016, NPC will continue with the inventory, classification and retention processes for a formal records program and will investigate options for new technology for document management, under the guidance of the Records Manager.

NPC currently utilizes six different software suites to manage its retail, attraction, culinary, golf, group booking and revenue consolidation activities. During NPC will begin the RFP process, to investigate options for an integrated Point of Sale and ticketing software suite, with Customer Relationship Management tools that will meet NPC's operational needs. Implementation is scheduled during 2017.

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

NPC will be continuing implementation of its three year brand development program, including the development of brand guidelines and development of a new Niagara Parks website. Work will continue on sub-brand re-development including Niagara Parks Culinary and Niagara Parks Heritage. NPC will leverage its membership with key tourism organizations (including the Tourism Partnership of Niagara, Niagara Falls Tourism, Ontario Culinary Tourism Alliance, Attractions Ontario), as well as relationships with OTMPC and Destination Canada, and with the boat tour service and new attractions such as the Zip Line Program to generate renewed interest in Niagara Parks.

NPC will continue to conduct ongoing market research through regular in-market surveys to ensure products, programs, services and attractions have unique characteristics that distinguish NPC from other tourist operators. NPC will continue to monitor visitor use of the Niagara Glen and other natural areas through counters located along the trail and through feedback during guided tours.

Power Plants – Adaptive Re-use of Historical Ontario Power Generating (OPG) Assets
(funded through \$245k received through the AMIS program)

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

During 2015/2016, NPC approved a project charter, which defines steps and timelines, consolidating relevant information about each building, site and infrastructure, in preparation for the procurement process.

- Stage 1, Development of a Baseline Document, was completed in 2015, consolidating over 47 reports and assessments conducted on the station properties over the past 30 years.
- Stage 2, the Gap Analysis, is currently underway. This process is to verify and evaluate current conditions and compare to the Baseline information, to determine where more information may be needed to provide proponents with a more complete understanding of the stations and their conditions, and to identify where physical intervention, or stabilization measures may be required.
- Stage 3 is the creation of a new Baseline Document for each station building, site and infrastructure to be provided to proponents within the procurement process.
- Stage 4 is the determination of work priorities to be undertaken by NPC, such as safety and preservation of heritage value the will be conducted by NPC and not considered as part of the Adaptive Re-Use project. This stage will include an assessment of types of intervention, timelines and costs.
- Stage 5 is the completion of the revised Baseline Document and the Visioning Document which will form the basis of the procurement package(s).
- Following Stage 5 will be Visioning Exercises (one with the Commission and Senior Staff, and one with outside stakeholders, to establish guidelines for the future of the facilities.

Oakes Garden Theatre *(Budget \$120k 2016; \$1,065k 2017)*

This spectacular garden is the entrance-way to Queen Victoria Park, the key central area of Niagara Parks that showcases the Falls. Located at the foot of Clifton Hill, this site provides a historical and superb panoramic view of the American and Horseshoe Falls. Concerts and special events are held in the gardens throughout the summer.

The gardens of Oakes Garden Theatre (OGT) are outstanding examples of strong design and architecture specifically to:

- Act as gateways to Canada
- Welcome visitors to the Niagara Parks system
- Provide an opportunity for enjoyment, relaxation and entertainment

- Showcase Canadian art, architecture and craftsmanship

OGT was designed in a classical form using principles and methods from the Beaux-Arts school of design. These included separation of spaces, using strong axes throughout the park, and designing spaces to penetrate one another (Milovsoroff, CHH, 1989). The design was intended to take advantage of the natural sloping topography of the site. The site was intended to be used as a garden theatre and serve as a gateway to Canada.

In 2014 repairs and restorations to Oakes Garden Theatre included underground electrical repairs to restore walkway and security lighting to the North corner of the stairs. Additional LED lighting was also installed to enhance safety. A layout and plan for an exposed aggregate accessible pathway leading from the North West entrance to the lower theatre is in process.

In 2015 an exposed aggregate accessible pathway was installed to keep with the existing appearance of a gravel pathway but allow accessibility to more than 60% of the garden area. Additional infrastructure provisions were installed for future lighting, electrical and irrigation.

Architectural and engineering reports and layouts were completed for the replacement of the Pergola wall and trellis including an exploration dig to establish proper footing details. Removal of a portion of the parkway facing retaining wall and an exploratory excavation was completed for engineering details for future wall reconstruction.

The plan for 2016 includes the construction of the accessible pathway, additional staircase lighting, and detailed engineering specifications for the retaining wall replacement that runs along the Niagara River Parkway. The addition of railings for accessibility, and preparation of the specifications for the pergola wall replacement are planned within the March 2016 capital budget. Pergola Wall replacement will be conducted in 2016/2017, and will be funded in part through a \$500k federal grant from the Canada 150 Grant program.

Tree Planting Initiatives & Emerald Ash Borer *(cost to replace tree cover over 10 years is estimated at \$300 thousand)*

Emerald Ash Borer (EAB) has been widely found throughout Niagara Parks resulting in a decline of ash tree health. Specimen ash trees within Queen Victoria Park (QVP) and the Botanical Gardens Arboretum have been and will continue to be treated with Treeazin to protect these trees and reduce safety risks in these high traffic areas. Due to the high density of ash trees in South Parks, including the Legends on the Niagara Golf Course, NPC is working with the Niagara Peninsula Conservation Authority and the Niagara Restoration Council to carry out best forestry practices on these EAB infested areas. During 2015/2016, NPC is securing a sawmill operator to harvest some of the existing ash trees while they are still merchantable (useful for lumber, firewood, etc.) based on the low intensity thinning plan that was developed by a Registered Professional Forester in the spring 2015. In the spring 2016 replanting of these areas, with other native tree species, will occur. NPC is also continuing with its tree planting programs to offset the loss of ash trees and with its research work with the Canada Food Inspection Agency and Trees Ontario.

NPC worked with Trees Ontario and their tree planting agents to secure funding through the Province's 50 Million Trees Program to facilitate the planting of 30,000 trees on NPC property, including 10,000 that were in recognition of the athletes and delegates participating in the Pan Am/ Parapan Am games.

The “Plant a Tree” Program was introduced in 2011 to school groups for the first time presenting NPC’s young guests with a hands-on experience, planting young saplings under the direction of staff from NPC’s Horticulture staff. In 2016-2017, NPC will continue to provide the program which includes information on the importance of NPC’s stewardship roles in preserving and protecting our parklands. NPC is extending the offering through sales to other groups visiting our parks and to local companies looking for team building opportunities.

Additionally, NPC has further promoted and provided opportunities for the general public to donate to tree planting initiatives including the impacts of EAB.

Revenue Generating Opportunities Plan – Upcoming Renewals

NPC has several RGO’s that are provided by third parties. NPC’s RGO 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.

In addition to the NPC Marina at Miller’s Creek and the Power Plant initiatives which have been described in this Section, following are the renewals anticipated within the planning period:

RGO	Current Vendor	Date for New Contract
Horsedrawn Carriage Rides	Sentineal Carriages Inc.	Spring-2016
Currency Exchange Booth	Vacant	Spring/Summer-2016
Automated Bank Machines	Direct Cash Management	Spring-2016
Photo Concession	Digital Attractions Inc.	December-2016
Niagara River Access License	Smugglers Cove Boat Club	December-2016
View Finder	CPC Vending	Spring-2016
Bicycle Rental Tours	Zoom Leisure Inc.	Spring-2016
Glow in the Dark Items	Glow in the Park	Spring-2016
Quick Service Coffee Shop (TR)	TDL (Tim Horton’s)	August-2016
Coin Press	Coin Press Canada	November-2016
Jet Boating at Whirlpool	Niagara Gorge Jet Boating	December-2016
Art Corner	Multiple vendors	December-2016
Japan/Asian QSR Kiosks	Au So Sushi	May-2018
TRQS New Pizza Unit	Pizza Pizza	May-2018
Bus Tour Operator	Double Deck Tours	December-2018
Solar Parking	Precise Parklink Inc.	December-2018

5.0 RESOURCES NEEDED TO MEET GOALS AND OBJECTIVES

NPC has implemented a streamlined management structure (See Section 7.0 Human Resources). The structure is designed to assure greater accountability and build more capacity within the organization to manage specific service areas as well as better manage 3rd party relationships and the hundreds of external contracts each year.

Financial and human resource requirements for the priority projects identified in Section 4.0 of this Business Plan are being achieved within the existing staff complement, budget and partnerships, with the exception of additional funding required for the implementation of improvements to the adaptive Re-use of Historical Ontario Power Generating (OPG) Assets. The cost estimate to address/remediate above ground deficiencies to these three facilities was recently estimated to be approximately \$26.67 million. These cost estimates, as well as estimates for underground capital repairs will require external funding.

Following are the resources included in the 2016 capital budget for strategic initiatives:

Table 5.1 Attraction Renewal and Strategic Initiatives

Project	2017 Budget	Completion Date
Aerocar 100th Anniversary	\$200k - funded from operations	May-16
Table Rock Grand Hall	\$125k - funded from operations	Oct-16
Butterfly Conservatory	\$85k - funded from operations	Oct-16
Oaks Garden Theatre	\$565k - shared with Federal Govt	May-16
Miniature Village	\$100k - funded from operations	Dec-16

Infrastructure Renewal

One of NPC's most pressing challenges is to effectively manage the balance required in its preservation and economic development roles. The need to invest in infrastructure was highlighted by the Provincial Government in its Tourism Competitiveness Report published in 2009 (The Sorbara Report). Recommendation 13 of the Report calls on Government to ensure: *"Anchor attractions that help drive business in the surrounding area should be a funding priority for future tourism infrastructure investment. A number of issues need to be addressed including: overdue need for state-of-good-repair improvements, lack of new construction, increased maintenance costs, dated and aging attractions, limited partnerships and lack of appeal to broad demographic groups."* Further, the Report concluded that NPC was among the top five Ontario public products that had the potential to increase their tourism product offerings and economic activity. Management has conducted a full inventory of facility assets as part of a provincially funded initiative. The current cost estimate to address deficiencies is approximately \$157.21 million, including the \$26.67 amount for Power Plant facilities (see Table 10.6). Continued funding for these activities is included in the 2017 operating budget.

Provincial Approvals

The following Provincial Approvals are anticipated during 2016/2017:

- Business Plan by June 2016
- NPC Marina at Miller's Creek, potentially an Order In Council (OIC) for Land Lease – Fall 2016
- Capital funding requests that are within the Business Plan – July 2016

6.0 ENVIRONMENTAL SCAN

Year in Review

The Niagara Parks Commission and the tourism industry as a whole in Niagara, entered the 2015 tourism season optimistic that an upswing in the tourism economy was soon to take place. Major events planned for the year, such as the Pan Am and Parapan Am Games in Toronto, as well as Niagara hosting Canada's most important tourism industry gathering, Rendez-vous Canada, were expected to be important factors in creating a positive spotlight on Ontario, Niagara and Niagara Parks, as world-class destinations worth visiting this tourism season.

Entering 2015, one would not have expected the tremendous cold or polar vortex, to help set the tone for a successful tourism year; but that is what exactly happened as Niagara Parks and its destination partners celebrated the arrival of the new tourism season on an upswing, by hosting one of its most successful New Year's events ever. With more than 60,000 visitors gathered in Niagara and Queen Victoria Park for the celebrations, the Niagara Falls Review reported, "New Year's Eve at Niagara Falls was not only a ratings blockbuster, it was also one of the best nights ever for businesses in the area."

The phenomenon known simply as the Frozen Falls then took hold in February, capturing the imagination of many, while leading to renewed international attention, media coverage and increased visitation to Niagara and Niagara Parks, which continues to this day. With coverage obtained on CNN, the NBC Today Show and NBC Nightly News, Niagara Falls was now a top of mind destination to many; including in Canada's most important international tourism market – the United States. Media value obtained during the month exceeded over \$7 million dollars, leading to over 15 million positive media impressions left with potential visitors – something the destination and Niagara Parks could not have hoped to generate on its own.

These two months were harbingers of good things to come, as Niagara and the Canadian tourism industry as a whole, were set to experience a tourism renaissance not seen in years. In fact, in its recently released Annual Report, the Tourism Industry Association of Canada indicated "2015 is shaping up to be one of the best years for Canadian tourism in over a decade," and based on its operational results to date, Niagara Parks agrees.

Hosting important events and obtaining positive media coverage is but one factor in the economic recovery that has taken root in the tourism industry in 2015. Continued economic growth in the United States, lower oil and gas prices, combined with a low Canadian dollar have all benefited the Canadian tourism industry, as well.

Statistics provided by the Ontario Ministry of Tourism, Culture and Sport confirm this, as American visitation to the Province rebounded significantly in 2015, as U.S. border crossings into Ontario increased by 8.6% over the first nine months of the year. This visitation growth and its associated spend have been a significant factor in the economic improvements realized by NPC, as U.S. visitors to the Park represent the largest segment of NPC's current visitor mix. In fact, 48.8% of all respondents to NPC's customer survey, conducted in the spring and summer of 2015, identified themselves as being a resident of the United States.

Given the weakened state of the Canadian dollar, more and more Canadians decided to undertake their vacations here at home and Niagara Parks and the Niagara tourism industry were the

beneficiaries of this trend. For the first time in several years, the Ontario Ministry of Tourism, Culture and Sport reported that over the first nine months of 2015, Canadian visitors' returning from the U.S. into Ontario actually dropped by 13.1%, a significant decline and one to watch in terms of continued growth in domestic visitation and spend. As a result, domestic visitation to NPC, primarily from visitors from the Greater Toronto Area (GTA), helped play an important role in the tourism recovery experienced in 2015. According to NPC's recent customer survey findings, homegrown visitation represents NPC's second largest market segment, with 30.4% of all respondents identifying themselves as being from Canada.

The growth of overseas visitation to Ontario continues to be a bright spot, as international visitation rose by 9.8% during the first nine months of 2015; a reflection of the strong growth being experienced in both traditional (U.K. +9.6%, France +11%, Netherlands +20.9% and Japan +3.0%) and new and emerging markets such as China (+16.6%), South Korea (+15.2%), India (+11.7%) and Brazil (+28.6%). Of the 17 countries monitored for travel into Canada, only 1 reported a decline in visitation over the first nine months of 2015 (Germany -1.1%).

As a result of this growth in visitation, overall attendance at NPC's attraction venues was up by 14% over the first seven months of the fiscal year. This strong growth helped propel an overall increase in gross revenues earned by the Commission of \$8.85 million (15.2%), or up \$6.6 million (10.9%) year-to-date, when compared to budget for the first seven months of the fiscal year.

NPC's retail operations meanwhile experienced a \$2.34 million (14.6%) increase in gross revenues over the first seven months of the fiscal year, or up \$2.199 million or 13.7% from budget, while gross revenues by NPC's culinary operations were also up \$ 1.04 million 7.1% YTD and \$1.265 million or 8.7% compared to budget forecasts.

NPC's golf department, meanwhile experienced a \$198,000, or 6.3% increase in revenue. While total rounds of golf played at NPC have increased, inclement winter weather resulting in higher than expected maintenance costs and a later opening (June) at Whirlpool did impact the unit. As well, continued deep discounting practices in the local industry, contributed to lower than expected rounds played at Legends on the Niagara Golf complex.

In this, the first full year following the celebrations of the Bicentennial of the War of 1812, visits to NPC's main heritage venues experienced decline in visitation of 8.1%. Despite this, revenues generated by the unit were up marginally by \$4,000 or 1% versus last year. When compared to budget, the unit missed its forecasts slightly, by \$6,000 or 1.5% year to date.

While this growth in visitation and its associated spend can be in part explained by economic factors such as the low value of the Canadian dollar, it is important to remember that more is needed to sustain a healthy tourism economy than what the Tourism Industry Association of Canada has called, simply "relying on currency exchange as a growth strategy..."

Niagara Parks is well aware of this, and has implemented its own strategic plan that has resulted in greater investments in new products and services, marketing and brand development, as well as an enhanced value proposition, in order to educate and drive continued visitation to Canada's most recognized tourism destination.

For instance, in 2015 a greater emphasize was placed on enhancing the visitor experience of Niagara Parks sites and attractions. At NPC's Journey Behind the Falls attraction, improvements

have been implemented to its ticketing plaza, in order to create a greater sense of arrival and awareness for our visitors about the attraction, which is celebrating its 126th year of operation. As winter approaches, new elevators are also to be installed to improve the overall access, comfort and safety for visitors to Niagara Parks' most popular attraction.

At the Niagara Park White Water Walk attraction, a new exit staircase was added, providing a second means of egress from the attraction, and a new fully accessible viewing platform built, to allow all visitors an opportunity to marvel at the Class 6 rapids and experience the relentless power and beauty of nature, from this location.

Accessibility was also a key consideration in the revitalization of the NPC Lower Incline Plaza, which was completed in the summer of 2015. The redevelopment of the lower plaza was initiated in order to create a more welcoming environment for the thousands of visitors entering Niagara Parks each day. More importantly, it allowed NPC to build upon its efforts to improve the overall accessibility of all its sites and attractions, located within Queen Victoria Park.

The revitalized Lower Incline Plaza also brought with it exciting opportunities for NPC to provide new programming options and services at this location, allowing this new pedestrian space to become a meeting place, where guests could obtain information, plan their visit, and enjoy all that Niagara Parks has to offer. This was particularly timely, as Niagara Parks played host to events such as Rendez-vous Canada and then later served as one of two the starting points for the Parapan Am Games Torch Relay, which took place on Monday, August 3, 2015.

During the Rendez-vous Canada Showcase in May, Niagara Parks was pleased to announce it has received Provincial approval to enter into an agreement with Niagara Adventure Excursions Inc. (NAE), to develop and operate a new zip line attraction and aerial adventure course at NPC's Grand View Marketplace and Thompson Point locations, starting in 2016. Final site designs are now being completed as construction is expected to begin in January of 2016. The new zip line attraction at Grand View Marketplace and aerial adventure course at Thompson Point will provide visitors with a breathtaking, authentic Niagara Falls and Niagara Parks experience. These two new attractions are in keeping with Niagara Parks other natural attractions and provide another unique way to interpret the Falls, the Niagara Gorge and all the lands along the Niagara Parkway, without impacting views or access enjoyed by other visitors to the Falls.

The past year also saw Niagara Parks continue its effort to further promote and establish its brand and vision of becoming one of the most respected parks agencies in all of Canada. To do so, a multi-layered approach, relying on both traditional media and advertising options, as well as new media and social media efforts to effectively position NPC's truly unique places, experiences and offerings, which only it can provide.

An example of these efforts included NPC working with organizers of the Buffer Festival to promote Niagara Parks and its unique offerings. The Buffer Festival is an annual theatrical showcase that celebrates international video content from the most acclaimed creators on YouTube. As a means to engage NPC with a younger demographic, which consumes travel and tourism information primarily through social networks such as YouTube, Twitter and Instagram, NPC conducted a familiarization tour for interested participants at the Festival, hoping to garner positive social media coverage on attendees' various popular social platforms. The two-day tour resulted in NPC's highest engagement ever being reached on Twitter. Those attending also posted a total of 35 photos on their Instagram accounts, garnering exposure from over +33,000

followers. Four attendees also produced “vlogs” of their experience in the Parks which also resulted in over 33,000 views in total.

Not limiting itself to marketing initiatives alone, Niagara Parks continued to take a leading role in the development of events and promotions to further enhance and encourage visitation to Niagara and Niagara Parks. In August, NPC was pleased to announce the return of its highly entertaining and family-friendly sound and light show, Onguiaahra: Thunder of Waters, which combined the power of water, sound and laser light to showcase the beauty, mystery and magic of Niagara Falls.

In addition to hosting its own events, Niagara Parks has continued to play a leadership role within the destination and in dealing with local stakeholders groups and governments on joint promotional efforts, including the longest running “Falls” fireworks program in the country, the traditional New Year’s Eve concert within Queen Victoria Park and the newly revitalized Winter Festival of Lights that has been taking place in the community and Niagara Parks for the past 33 years.

During the summer and as part of its continual efforts at promoting and growing the game of golf, NPC was proud to announce the return of its annual junior golf programs, as well as the revival of one of its more important golf tournaments, the Whirlpool Amateur.

As part of its efforts to grow the game, NPC’s junior program allowed all junior golfers, aged 16 and under, a free round of golf on its Chippawa course at Legends on the Niagara, as well as a free bucket of golf balls to be used at the Legends Driving Range, when the junior was accompanied by a paying adult. Over 400 junior girls and boys participated in this popular program.

Encouraging children to play golf and making the game fun, accessible, affordable and welcoming for all young people is key to the health and future of the game. As a result, Niagara Parks was also proud to once again host its popular junior golf camps from July through to August. These camps covered such topics as: full swing (including a video analysis), short game, sand shots and putting. Golf on the Chippawa course and a final day pizza lunch, with a group photo and award presentation was also included. During the two months, 25 children were enrolled in the programs.

In July, Niagara Parks was pleased to host the Whirlpool Amateur Golf Tournament, one of the oldest and most celebrated amateur golf tournaments in the Niagara region. The winner of the tournament, which was played on Sunday August 9, was Mike Claxton, a local player on the Niagara Men’s Tour. The Whirlpool Amateur was first played in 1961 and was originally called the Niagara Parks Amateur. Over the years, the tournament has consistently attracted many of the top amateurs in Ontario, competing for the historic F.M. Cairns Trophy. Since the event began, no winner has ever shot better than 70, proving that Whirlpool has stood the test of time as a true challenge to the best in golf.

In 2015, NPC’s culinary team continued to build upon its brand redevelopment strategy through menu engineering and shift toward offering more locally grown fare, produce, as well locally produced VQA wines and craft beers. These efforts, which have met with the great success, led NPC to seek “FeastON” certification through the Ontario Tourism Culinary Alliance, for its Elements on the Falls Restaurant, Edgewater at Queen Victoria Place and Queenston Heights Restaurant

in 2015. FeastON accreditation is awarded to restaurants following a rigorous review of their menus and food purchase history. "FeastON" restaurants must buy a minimum of 25% Ontario food product, feature a minimum of 25 per cent Ontario beverages (ex. Niagara VQA wines, Ontario craft beer) and support the promotion of Ontario products through both partnerships and participation in community events supporting this mandate. Through this program, Niagara Parks is supporting and profiling Ontario foods and beverages, bringing particular focus to the Niagara region and our local producers.

2016 External Overview

Entering 2016, continued economic growth in the U.S. economy is forecast and a positive sign, not only for its possible impact and support for future U.S. tourism visitation to Canada, but also as it relates to assisting in the recent growth and resurgence of the Ontario economy.

According to the Ontario Ministry of Finance, in its Economic Update on November 26, 2015, "Ontario's economy continues to grow in an increasingly competitive global environment." As such, the Provincial Government is forecasting real Gross Domestic Product growth (GDP) within of Ontario as being 1.9% for 2015 and 2.2% annually, on average, over the 2016 to 2018 period. This assessment was supported by the Ontario Chamber of Commerce, which indicated in its most recent 2015 Economic Outlook that, "Ontario stands to benefit from external forces more than at any time in the past 10 years. The combination of higher U.S. growth, the lower Canadian dollar, and cost savings by consumers and businesses, from lower oil prices, notably in transportation, will push up the province's real GDP growth to 2.7% in each of the next two years."

In terms of the overall Canadian economy, the Federal Finance Minister, Bill Morneau indicated in his recent economic update on November 20, 2015, that "private sector economists now expect real GDP growth to average 1.9% per year over the 2015 to 2019 period, 0.2 percentage points lower than expectations at the time of the last budget." The Organization for Economic Cooperation and Development (OECD) has forecast economic growth in Canada to begin to "recover in 2016, and reach 2.3% in 2017." The Bank of Nova Scotia in its most recent Global forecast agree with this assessment, stating, "strengthening net exports and increased infrastructure investment alongside relatively cautious spending by consumers and businesses underpin our forecast for moderate output growth in 2016 and 2017 of 1.8% and 2.3% respectively."

Despite NPC's improved financial performance and increased capital spending, further investments in capital maintenance and facility infrastructure are required to address the current backlog of capital works projects required in the Park. One area Niagara Parks may find of interest in this regard for future follow-up, is both the Federal and Provincial Governments' renewed commitment to infrastructure spending.

According to Ontario's Finance Minister, Charles Sousa, "Ontario has committed to making the largest investment in public infrastructure in its history. This investment, with more than \$134 billion over 10 years in priorities such as roads, bridges, and public transit, will support more than 110,000 jobs on average per year." The Federal Government has also indicated it will move to increase infrastructure spending by an average of \$6 billion per year.

Both the Bank of Nova Scotia Global Forecast and TD Economics project little in the way sustained economic growth in Europe in 2016, with both forecasting modest growth of between 1.7% (Bank

of Nova Scotia) and 1.8% (TD Economics) for the coming year. While higher growth levels continue in the emerging economies of Asia (China and India), and some Central and South America nations, most notably Mexico, this too has eased. As a result, the OECD on November 9, 2015 reported that it expected “the global economy to grow by less than 3% in 2015. This is the weakest growth since 2009 and well below the long-run average. This largely reflects further weakness in Emerging Market Economies (EMEs), with recessions in Brazil and Russia and the slowdown in China hitting activity in key trading partners.”

2016 Internal Overview

Looking towards the future, Niagara Parks has identified several projects and initiatives that it will be undertaking over the course of this three-year business plan. Chief among these is the continued need to make key investments in its systems, technology, infrastructure and people to ensure NPC’s continued relevance as an agency responsible for the promotion and preservation of the heritage and lands it is entrusted to protect, all along the Niagara River corridor.

In terms of new attraction development, The Niagara Parks Commission enters 2016 excited over its new partnership agreement with Niagara Adventure Excursions, which will result in the development of a new zip line attraction and aerial adventure course within the Park. Zip lines have become major eco-tourism attractions and are being operated successfully in other parks, historic and environmentally sensitive locations, throughout the world.

These two new attractions, at the Grand View Marketplace and Thompson Point, will offer new ways to interpret the Falls, the Niagara Gorge and the lands of The Niagara Parks Commission. They will also allow NPC to provide infrastructure enhancements at each of these locations. At Grand View Marketplace zip line, for instance, a lift will be installed to access the launch area of the zip line. Previously, this area (at the top of the elevator building) was utilized as a viewing point for the Falls and was not accessible for persons with disabilities. The infrastructure improvements will now offer the opportunity for all visitors to enjoy the breathtaking views from this vantage point.

At the Thompson Point aerial adventure course, washroom facilities will be added for the use of the general public in addition to aerial adventure course guests. Washroom facilities were not previously available at this location. The aerial adventure course will also provide NPC with an opportunity to enhance the tree inventory and trail system at this location.

Final site design work is now being completed and work will soon begin in the new-year to establish these two new attractions in time for the spring and summer tourism seasons.

Niagara Parks also continues to move forward with its plans to enhance and improve the overall operations of its Niagara Parks Marina. Following a well-attended public information session conducted on Thursday October 29, 2015, a formal Request for Information (RFI) was issued by the Commission on November 17, 2015. The purpose of the RFI is to both provide and gather information to determine third party interest in NPC’s marina plans to provide a water-based destination that would strengthen the visitor and tourist experience along the South Niagara Parkway. The RFI will gather information on three enhancement scenarios envisioned by the Commission:

- **Scenario A** – Seeks to rehabilitate the current marina amenities through a multi-phased plan that is operated by a third party;

- **Scenario B** – Envisions the maximization of boating recreation at the site with a new high quality marina facility that meets market potential in quantity, capacity and revenue, while also providing significant publicly-accessible activities (pier, fishing as an example) and amenities (food and beverage) through a third party capital investment and operation;
- **Scenario C** – Builds on the marina facility of Scenario B and is also augmented by additional marina and public shoreline area enhancements, which integrate the entire NPC lands assembled as part of the project, to create a recreational resort through third party capital investments and operation.

It is anticipated that a future Request for Qualification and Request for Proposals will be issued by NPC in 2016, to advance a preferred scenario. Ultimately, NPC's vision for the marina and its associated lands, is to create a regionally unique, recreation destination, which is appropriate to the Parkway and its historical river setting. This vision is based on the establishment of an exceptional public marina facility that will be developed in an economically and environmentally sustainable manner. It will also provide easy and convenient access to all the attractions along the Niagara Parkway.

Given the financial improvements realized in the 2016 fiscal year, Niagara Parks will be in a position to make a greater investment back into its continually aging infrastructure and facilities. In 2015, NPC was able to allocate almost \$3.5 million toward its capital works projects, while this coming fiscal year, over \$6 million will be devoted to infrastructure improvements.

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

These assets, all built at the turn of the 20th century, represent a large financial liability which the Commission is in no reasonable position to assume fiscally. As a result, in 2016, NPC will begin the process of undertaking community and stakeholder consultations and studies so that it may be in a position to move toward a future Request for Proposals on possible adaptive reuse of these buildings.

The 2016 season will also be one in which the Commission will celebrate some significant milestones. As the spring and summer tourism seasons approach, NPC will be celebrating the centennial anniversary of its Whirlpool Aerocar attraction. Since it began operating in 1916, the Whirlpool Aero Car has carried millions of tourists safely over the Niagara River, offering unparalleled views of both the whirlpool rapids and Niagara gorge. The continued operation of the Aero Car is a living testament to the brilliance and foresight of its original Spanish designer, Leonardo Torres Quevedo, whose grandson and namesake visited Niagara Parks in September of 2010. Mr. Torres Quevedo, the head of the Spanish Society of Civil Engineers was in Niagara with members of the Canadian Society of Civil Engineers to present NPC with a plaque designating the Whirlpool Aero Car, formerly known as the Niagara Spanish Aero Car, as an International Historic Civil Engineering Work.

Created a century ago, the Whirlpool Aero Car is unfortunately not accessible to all. As staff begin work on its celebratory plans for the attraction, it will also be investigating the engineering and

financial requirements needed to allow the Commission to make the attraction accessible to all, for its next century of operations.

The Niagara Parks Botanical Gardens and School of Horticulture will also be celebrating its 80th anniversary in 2016. The School has produced over 660 graduates who promote horticultural excellence throughout the world. The Gardens serve not only the students but also the local and international tourism communities, receiving more than 350,000 visitors and guests annually.

In celebration of this anniversary, and in preparation for Canada's sesquicentennial celebrations in 2017, staff have initiated a review of the School and Gardens long-range Master Plan, last updated in 1993, to ensure the success of the School and Gardens well into the future. As well, staff, are now working with event organizers in preparation for two prestigious upcoming international conferences, the American Perennial Association Conference and the International Association of Arbor-Culturalist Congress, which the School and Gardens will be co-hosting and hosting, respectively in 2017.

In June of 2016, NPC will also be proud to take part in the unveiling of the ***Landscape of Nations***, War of 1812 Native Memorial, which is currently being constructed so as to be placed on the historic grounds of Queenston Heights Park. Given the significant involvement of Niagara Parks in the preservation of several War of 1812 sites within the region, the Commission has been pleased to be involved in this project, which seeks to honour and formally recognize the contributions of the Six Nations and their native allies during the War of 1812.

In preparation for the 80th anniversary celebrations of NPC's Oakes Garden theatre in 2017, staff have initiated much needed rehabilitation work at the Theatre and its adjoining Rainbow Gardens. In 2015, new accessible entrances and pathways were constructed to enhance the public facility. This coming year, with matching funds provided by the Federal Government's Canada 150 Community Infrastructure Program (\$500,000), NPC will be undertaking restorative work on the Theatre's pergola wall, which was removed in 2012, due to structural concerns.

With Canada's sesquicentennial soon approaching, NPC is pleased to be working on this project, as the Theatre and its associated gardens are outstanding examples of design and architecture created to specifically act as a dramatic gateway into Canada, which showcase Canadian art, architecture and craftsmanship; all in order to enhance the visitor experience within the Niagara Parks system.

As part of its ongoing role to support the destination and promote increased visitation to the region, Niagara Parks and the Niagara Falls Illumination Board have been investigating new lighting technology and capabilities to improve the overall illumination of both the Canadian Horseshoe and American Falls. It has been almost 20 years since the Illumination Board made a major investment in lighting technology and the success of events such as the Wallenda Walk and Red Bull Crashed Ice have shown the tremendous potential increased lighting can provide in showcasing Niagara to visitors from throughout the world. In 2016, both NPC and the Board, with community stakeholder support, hope to move forward with this project, through the selection of a preferred proponent, so that the enhanced evening illuminations of Falls can be in place for Canada's 150th anniversary celebrations in 2017.

NPC will also be initiating an employee survey in 2016 to build on the results of its engagement efforts with staff from its last survey completed in 2013. The survey is an important tool as it will

provide great insight into NPC employee opinions, engagement levels, job satisfaction, organizational commitment, and work-life balance. The results will be compared to the benchmarks established in 2013, and then used to create and update prior action plans to improve overall employee engagement, thereby leading to improved performance and productivity by the Commission overall.

NPC will also continue its work to ensure it is continually meeting the needs of its changing visitor base. In-Park surveys were once again initiated in 2015 and these results have been utilized to ensure NPC not only delivers, but continually works to enhance the experience of its Park venues and services, based on the needs and wants of its diverse visitor base.

For example, according to survey results, the vast majority of visitors to Niagara Parks continue to identify themselves as being on a day trip to the destination. While these respondents indicated they had spent over four hours in the Park, NPC was looking for ways to increase this length of stay, by encouraging visitors to do more while in-park. One tactic established in 2016 to help extend this length of stay, was the introduction of a new comprehensive package called the Adventure Pass Plus. The Adventure Pass Plus included the following:

- Journey Behind the Falls
- Whirlpool Aero Car
- White Water Walk
- Niagara's Fury
- Floral Showhouse
- Butterfly Conservatory
- Two-day WEGO
- Two-day Falls Incline Railway
- Hornblower Niagara Cruises (optional)

A total of 27,604 Adventure Pass Plus units were sold in 2016, but more important of those respondents who identified themselves as a pass purchaser, almost 88% indicated they were staying in the destination overnight.

The use of technology in customer-focused organizations is essential and must keep pace with advancements in the use of mobile devices, social media, payment devices and for communication of and the consumption of new products. As an example, NPC's web presence has allowed it to realize an increase in on-line sales of its popular Adventure Pass, with on-lines sales of the Pass rising by 15%, since 2012 alone. On-line sales now account for 29.1% of the over 281,000 Adventure Passes sold by Niagara Parks in 2016.

The creation of packaging and development of new pass options – Adventure Pass, Adventure Pass Plus, Wonder Pass, have assisted Niagara Parks in enhancing its value proposition for its guests, by providing additional options and product choices for all those who visit Niagara Parks. To further its brand, NPC has established a significant presence on-line through Facebook, Twitter, "Trip advisor" and other social media platforms and work in these areas will continue in these areas, including a full website redesign which is planned for 2016. Better integration of technology for tourism opportunities, such as the use of mobile "smart" technology to make purchase decisions, is becoming the norm and is an expectation of international and domestic travelers. In response, NPC will be creating a staff team in 2016 to investigate a new park-wide ticketing system to meet this ever-evolving shift in technology, shopping and buying patterns.

Demanding consumers expect coordination and linkages between experiences and it is up to NPC to provide it for them, if we are to encourage visitation to all that Niagara Parks has to offer.

2016 Economic and Visitation Forecast

Global Forecast Update as at November 30, 2015

REAL GDP	Scotiabank Group 2016 Forecast November 2, 2015	TD Economics 2016 Forecast September 21, 2015
-Canada	1.8%	2.0%
-U.S.	2.5%	2.6%
-Mexico	2.8%	3.0%
-Eurozone	1.7%	1.8%
-United Kingdom	2.2%	2.4%
-Germany	1.8%	1.9%
-France	1.3%	1.6%
-Japan	1.2%	1.1%
-China	6.4%	6.2%
-India	7.6%	7.9%
-Brazil	-1.5%	-0.3%

2016 – 2018 Visitation Forecasts – Total U.S. Visits

In its most recent forecast of U.S. visitors to Ontario, the Ministry of Tourism, Culture and Sport has forecast an overall increase in U.S. visitation to Ontario for the 2016 tourism year and beyond. With an economic recovery fully in place south of the border, American discretionary spending has increased, resulting in an increase in visitation and spend in the Province, not only this past year, but beyond.

2016 – 2018 Visitation Forecasts – Visits from the United States to Ontario

According to the Ministry, U.S. visitation during the course of this Three-Year Plan is expected to grow by:

- 2016 – 11,559 million visits (2.8% growth projected for the year)
- 2017 – 11,984 million visits (3.7% growth projected for the year)
- 2018 – 12,156 million visits (1.4% growth projected for the year)

2016 – 2018 Visitation Forecasts – Ontario Visits within Province

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

- 2016 – 126.333 million visits (2.6% growth projected for the year)
- 2017 – 129.012 million visits (2.1% growth projected for the year)
- 2018 – 131.708 million visits (2.1% growth projected for the year)

2016 – 2018 Visitation Forecasts – Visits from the Rest of Canada

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

- 2016 – 6.495 million visits (5.2% growth projected for the year)
- 2017 – 6.650 million visits (2.4% growth projected for the year)
- 2018 – 6.777 million visits (1.9% growth projected for the year)

2016 – 2018 Total Overseas Visits to Ontario

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

- 2016 – 2.815 million visits (4.2% growth projected for the year)
- 2017 – 3.008 million visits (6.8% growth projected for the year)
- 2018 – 3.231 million visits (7.4% growth projected for the year)

Appendix A to this Business Plan contains a summary of risks impacting NPC's Business Plan.

7.0 HUMAN RESOURCES

Strategic Plan

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

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

NPC has demonstrated these principles through various corporate initiatives in 2015 and will deliver further initiatives throughout the business planning period to meet the needs of the organization and the objectives of the strategic plan.

Workforce

NPC had a total workforce compliment in 2015 of 1,676 employees comprised of 300 full time staff and up to 1,376 seasonal employees. With part-time staff included, and considering the number of hours worked by seasonal employees, the Full Time Equivalent (FTE) is approximately 900 positions. There is no significant change in staffing levels anticipated during the planning period.

Service Delivery and Modernization

In 2015, NPC continued to strengthen its Human Resources function and client service delivery. This was achieved through the development and implementation of a Business Partner model and through investment in process modernization and technology improvements. NPC procured and embarked on a number of technology projects including the procurement of a new Applicant Tracking System in partnership with Monster Canada, a new Learning Management System and a new Human Resources/Payroll/Time and Attendance system. These projects are all underway and cross-functional project teams will be in place in order to facilitate process mapping and implementation of these new systems in the next fiscal year.

Labour Relations

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

NPC held a number of employee events in 2015 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 a United Way week where each day, a different department planned and implemented an event for staff. NPC expanded its Employee Awards program which promotes the nomination of employees by fellow employees for awards in the

following 5 categories: Customer Service, Innovative Business Solutions, Leadership and Empowerment, Team Spirit and Community Partnerships. In addition, NPC has a “Chair’s Award of Excellence” which is presented to the individual who exhibits exceptional performance in several of the individual award categories. Individual events were also held within each department to recognize those employees who have reached the milestones of 25, 30, 35 and 40 years of service with the NPC.

NPC continued to implement action plans which had been developed by individual work units and departments to address issues identified through its employee survey which was conducted in 2013. Survey teams were comprised of union and non-union staff to identify and implement various programs and operational improvements. A new employee survey will be conducted in the summer of 2016 to measure progress against the efforts that have been made.

NPC and OPSEU local 217-Park Police completed negotiations and signed a new four year contract which will expire October 31, 2019. Negotiations were also completed on a new four year agreement with Workers United Canada Council, Local 2347 which represents Restaurant Servers. That contract will expire December 31, 2018.

NPC held two Town Hall meetings in 2015 to connect with all staff, to review NPC’s vision and plans for the upcoming season and to review NPC performance. These sessions also provide a forum for employees to address various issues of importance to them and allows for personal interaction with the Executive team and Commission Chair.

Employee Learning and Development

Training continued to be a priority for the Commission in 2015 as there were 1,929 registrations for a variety of programs. This included 1,805 registrations for internal courses such as NPC Orientation, legislative and policy training (e.g. Code of Conduct, Human Rights, Violence/Harassment, Duty to Accommodate), Safety training such as Fire Extinguisher, Locates, Loader and Tractor, Forklift, Fall Arrest, Aerial Work Platform, Transportation of Dangerous Goods, and Safety Certification Parts 1&2. In addition, NPC supported 74 registrations for professional seminars and conferences and approximately 50 staff registrations for pre-retirement sessions conducted by OPSEU Pension Trust and the Ontario Pension Board. Licenses were also purchased to provide a wide variety of on-line training resources and self-paced learning modules.

In 2015, NPC continued its Speaker Series to further equip management staff with leadership skills and knowledge related to current best practices. This year’s key note speaker was Eddy Freel, Director of the Niagara Global Institute. On the topic of Developing a Destination for Tourism, staff learned strategies for creating a compelling narrative to sustain products and services that link to a destination’s core strengths.

NPC also invested in leadership development training for managers and supervisors through a partnership with Brock University. A total of one hundred staff took part in one of four-6 week sessions which covered the following topics: Personality Dimensions, Embracing the Leadership Challenge, Team Work-The New Competitive Advantage, Performance Management, and Building Action Plans to Support Ongoing Development.

As part of NPC’s modernization efforts, investment has been made in a new Learning Management System to enhance on-line training capabilities and provide a more effective means for tracking and managing NPC’s training efforts. This system will be operational in early 2016.

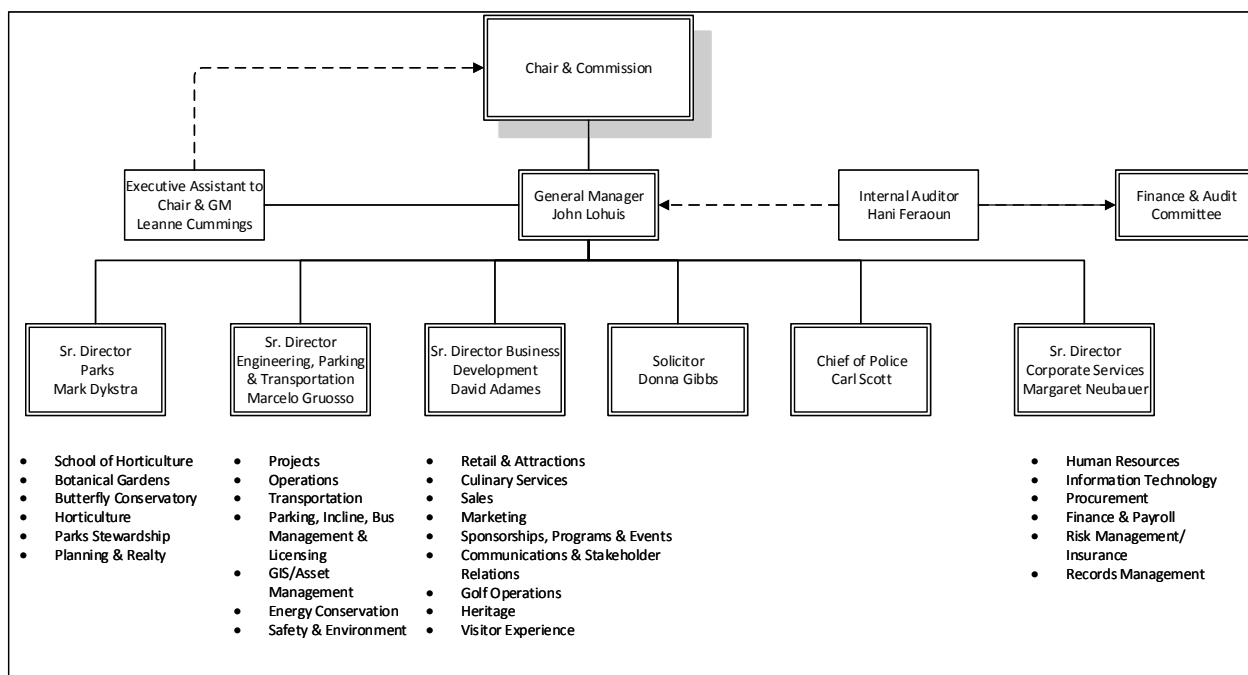
Talent Acquisition

In 2015, NPC developed and implemented a streamlined process for full time recruitments in order to realize greater efficiencies. Human Resources staff coordinated 50 posted job competitions for full time, temporary and apprenticeship positions. In addition, a number of departmental reorganizations took place to achieve efficiencies and shape new operating models.

The vast majority of NPC’s hiring each year is for seasonal positions to meet visitor needs during the spring and summer peak periods. In 2015, NPC received 2,178 applications for seasonal employment. This is flat to the same period in 2014. There were fewer community job fairs than in previous years and as a result, NPC held its own community job fair, garnering 275 applications in a four hour period. NPC’s 1,373 seasonal staff were comprised of 732 students, 23 Apprentices and 618 non-student staff. Of the total seasonal compliment, 330 were new employees to the NPC, which is indicative of the economic impact that the organization has on the local community.

The new on-line Applicant Tracking System will further assist to streamline the recruitment and hiring processes for both full time and seasonal vacancies.

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. As the result of the changes to post-retirement benefits, it is anticipated that NPC will experience a significant workforce adjustment by the end of 2016. A formal succession planning model is being reviewed for future talent acquisition needs.



Compensation Strategy

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

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

All union rates and job evaluation strategies are negotiated with the local bargaining agents.

In 2015, NPC procured Mercer Canada to develop and implement an updated job evaluation system for its non-union full time and significant contract positions. The project measured both internal and external market equity.

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

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

Health and Safety

NPC undertook a review of its Health and Safety program in 2015 and restructured a number of reporting relationships to meet future organizational needs. All safety, compliance and environmental issues have partnered with the Engineering function while issues pertaining to WSIB, early and safe return to work and workplace accommodation continue to reside within the Corporate Services function.

Key accomplishments in 2015 included delivery of a new orientation training program, Health and Safety certification of 30 staff members, the procurement of a new Medical Services Provider, an improved medical surveillance program, development of a controlled access program for visitors and contractors as well as the development of a newly automated system for conducting workplace inspections. An improved incident reporting system was also developed to ensure that management and other key individuals are kept abreast of both occupational and non-occupational issues and workplace accommodations.

NPC participated in an S-Gap audit through Safety Groups. A number of opportunities for improvement were identified and a cross-functional team was established to address the recommendations of the audit.

NPC continues to monitor Ministry of Labour (MOL) visits to NPC as well as safety practices of external contractors working at NPC properties. There were 7 Ministry of Labour visits to NPC pertaining to non-work-related loss of consciousness and occupational illness issues. No MOL orders were issued. Fifty-eight (58) contractor spot checks were carried out in 2015 with 8 issues being identified related to safety procedures, personal protective equipment and required on-site documentation. In each case, the issue was rectified immediately.

Particular focus in 2016 will be on the enhancement of NPC's current harassment and violence in the workplace policies and programs to comply with new upcoming provincial legislation and directives related to the prevention of sexual harassment.

Future Initiatives to meet NPC’s Mandate and Strategic Plan

NPC has developed a three year Human Resources plan in consultation with the Executive Team to address the current and future needs of the organization. Key Human Resources issues to be addressed to achieve NPC’s mandate and strategic plan include:

1. Enhancement of the HR business model to provide more effective/proactive partnerships and support to business units
2. Modernization of HR processes, technology and reporting
3. A new learning and development model to support upskilling and effective tracking
4. Succession planning to address anticipated workforce retirements
5. Employee engagement and recognition
6. Stronger labour relations
7. Renewed Health and Safety/Wellness initiatives

Key Human Resources Priorities and Actions

2016/2017

Technology

- Full implementation of Applicant Tracking System/Employment Branding
- Implementation of a new Payroll/Time and Attendance system
- Implementation of a new HRIS system
- Development of increased on-line fillable forms

Learning and Development

- Implementation of a Learning Management System (LMS) to track training and provide internal training programs on-line to meet department needs
- Introduce new corporate orientation program
- Introduce new on-line employee handbook

Performance Management/Succession Planning

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

Employee/Labour Relations

- Conduct updated employee survey
- Focus on culture change
- Streamline seasonal employment contract process

Health/Wellness

- Enhance Employee Assistance Program (EAP) reporting, analytics and trending
- Development and implement updated tracking systems for Health & Safety Programs
- Participate as a member of the Safety Gap (S-Gap) Cross-functional team to address health & safety audit recommendations
- Update current harassment and violence in the workplace programs to include emphasis on sexual harassment prevention in accordance with new provincial policy and direction

2017-2019

Technology

- Implement self-service capabilities of Human Resources/Payroll/Time and Attendance system
- Update employee website; create ability to build/store resources online

Learning and Development

- Research and provide additional training and upskilling options (i.e. Collective Agreement, performance management, strategy development, coaching, time management)
- Ensure HR staff are cross-trained to create capacity and capability in other functional areas for appropriate assistance and relief
- Develop a Human Resources Manual for Managers

Employee/Labour Relations

- Establish formal mentoring program
- Complete contract negotiations with OPSEU, Local 217-Park Employees (2017)
- Complete contract negotiations with Workers United Canada Council, Local 2347 (2018)
- Complete contract negotiations with OPSEU, Local 217-Park Police (2019)
- Utilize on-line survey tool for key HR issues as required (e.g. exit interviews, pulse surveys)
- Review/Refresh employee recognition programs
- Develop Attendance Management program

Health and Wellness

- Create a formalized disability management program
- Develop corporate wellness program

8.0 PERFORMANCE MEASURES

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

Finance

NPC is projecting to exceed its net income target for the year ended March 31, 2016 by \$4.7 million. Further details are provided in Section 10.

Contribution from Revenue Producing Operations

For the year ended March 31, 2016, NPC is projecting a contribution from Revenue Producing Operations (RPO) of \$24.737 million, an improvement of \$5.445 million over the contribution from RPO's from 2015 operations. For the 2017 Budget, NPC has established a target contribution of \$24.115 million from RPO's, based on 2015/2016 results, a review of three year averages, new contracts and forward bookings.

	Retail	Attractions	Parking	Incline & WEGO Railway	Heritage	Culinary	Golf	Events	Total
April 1, 2015 - March 31, 2016	\$ 5,750	\$ 13,186	\$ 5,272	\$ 1,334	\$ (873)	\$ 1,573	\$ (909)	\$ (596)	\$ 24,737
April 1, 2014 - March 31, 2015	\$ 4,645	\$ 10,744	\$ 4,267	\$ 959	\$ (883)	\$ 1,231	\$ (1,087)	\$ (584)	\$ 19,292
\$ increase in contribution	\$ 1,105	\$ 2,442	\$ 1,005	\$ 375	\$ 10	\$ 342	\$ 178	\$ (12)	\$ 5,445

From April 1, 2016 through March 31, 2017, NPC is targeting a margin similar to the 2016 fiscal year (2016: \$24,737; 2017: \$24,115). Refer to Table 10.1 for the 2017 Operating Budget target.

Attendance

Attendance for attractions and historic sites in 2015/2016 is projected to be up 18.5% from 2014/2015 levels at 6.01 million paid admissions. Attendance statistics are an important KPI for NPC, and a comparative listing of Attendance for the years 2012 through 2015 is contained in Appendix B. The Board reviews attendance statistics on a monthly basis. For 2017 budget, NPC is projecting a similar level of attendance as achieved (6.01 million paid admissions).

Customer Survey

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

	2015	2014	2013
Average party size	3.6	3.6	3.77
% of respondents from the US	48.8%	37%	51%
Respondents who stayed overnight in the Niagara Region	73.7%	64.5%	76%
% of day trippers who stayed 4 hours or more during their visit	91.2%	89.2%	81%
Respondents who purchased an Adventure Pass	32%	30%	36%

Questions to assess NPC brand awareness were posed in the survey, and responses indicate that 48% of respondents were familiar with Niagara Parks. This is a marked improvement over 2014, where only 15% of respondents were familiar with “Niagara Parks”. 97% of respondents were very likely to recommend Niagara Parks to friends and family. NPC is targeting a similar or higher response for fiscal 2017.

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

Appraisal return rates

Target: 100% by deadline established by management

Results: Seasonal return rate by deadline: Oct 2015: 69% Nov 2014: 81%;
 Seasonal appraisals are completed prior to seasonal layoff. In 2015, due to favourable weather and Winter Festival of Lights activity, several staff had not yet been laid off and that is affecting the return rate for 2015.

Full time return rate: 100%: this rate has been achieved for the current and prior year.

Health & Safety

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

Results:

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

Sick Leave

Target: Improve average sick day from 2014.

Results: 2015 average sick days 6.09 days per person compared to 2014 average of 4.54 days per person. NPC did not meet the 2015 target, however, sick leave for NPC continues to trend with other public sector organizations which average 8 – 12 days annually

Employee Learning and Development

In 2015 there were 1,929 registrations for a variety of programs. This included 1,805 registrations for internal courses such as NPC Orientation, legislative and policy training (e.g. Code of Conduct, Human Rights, Violence/Harassment, Duty to Accommodate), Safety training such as Fire Extinguisher, Locates, Loader and Tractor, Forklift, Fall Arrest, Aerial Work Platform, Transportation of Dangerous Goods, and Safety Certification Parts 1&2. In addition, NPC supported 74 registrations for professional seminars and conferences and approximately 50 staff registrations for pre-retirement sessions conducted by OPSEU Pension Trust and the Ontario Pension Board.

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

Earned Media

Earned media refers to the publicity and coverage NPC has obtained through its own promotional efforts other than being purchased through advertising – via broadcast, newsprint and online channels. The total of \$13 million represents the value that NPC would have had to purchase for the coverage it received via various media channels for the stories and events that were covered during the past year. The value is calculated by NPC’s media monitoring firm – and is provided to NPC on each story that is covered.

Month	Total Media Value	Total Viewership Reach
Nov-14	\$1,312,930.00	not available
Dec-14	\$70,818.00	not available
January (includes NYE)	\$1,064,514.00	15,357,096
February	\$7,070,471.00	15,366,403
March	\$173,108.00	9,449,596
April	\$152,437.00	8,907,364
May	\$272,418.00	15,587,980
June	\$228,496.00	11,903,677
July	\$251,880.00	13,592,178
August	\$458,605.00	15,164,537
September	\$214,279.00	9,739,437
October	\$2,057,989.00	13,671,916
TOTAL	\$13,327,945.00	128,740,184

NPC is reviewing the method used to capture this performance measure during 2016/2017, to determine if more meaningful measures are available.

Asset Condition

<i>(millions)</i>	Buildings & Structures	Equipment	Vehicles	Total
Historical Cost	\$228	\$41	\$4	\$273
Useful Life	7 – 40 years	3-10 years	10-12 years	
Annual Amortization Charge	\$6.46	\$1.56	\$0.15	\$8.17
Net Book Value	\$120.0	\$4.3	\$0.8	\$125.1
Net Book Value as a Percentage of cost	53%	10%	20%	

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

Information Technology Modernization

Table 8.6 IT Performance Measures	
Help Desk Tickets	3,894 IT Helpdesk tickets Nov-Oct 2015 similar volume to prior year. On average 333 tickets per month.
Service Levels	59% same day resolution and 82% resolved within one week.
Hardware	Replaced Server 2003 with Server 2008 Virtual Machines. Refreshed desktops five years of age or older
Network and Infrastructure	Expanded NPC internal fibre network to cover core transaction area inclusive of Table Rock to Grandview Plaza. Expanded Guest WiFi at Table Rock and the following attractions: Incline, McFarland House, Whirlpool Golf and Legends Gold. Total Guest enabling WiFi sessions for 2015 is 184,619

NPC is targeting IT performance measures in 2017 that meet or exceed 2016 performance.

9.0 RISK IDENTIFICATION ASSESSMENT AND MITIGATION STRATEGIES

NPC provides updates on risks in the quarterly reports submitted to the Ministry. The risk categories are the same as what the Ministry is required to report on to Treasury Board/Management Board of Cabinet (Strategic, Accountability/Governance, Operational, Workforce, Information Technology & Infrastructure, Other).

NPC's risk assessment and mitigation strategies for this business planning period are reported using this format, and are included as **Appendix A** to this business plan.

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

10.0 FINANCIAL BUDGET AND STAFFING

NPC is expected to be a self-sustaining board-governed provincial agency. NPC generates revenues from a variety of operations. The largest source of revenue earned is from the Commission's commercial activities. For the year ended March 31, 2016 this source is projected to generate \$86.3 million or 91% of total revenues. The remaining \$8.2 million or 9% is generated from water/land rentals, fees, sundries and premium earned on U.S. funds.

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

Staffing - Summary of Staff Complement

NPC employs approximately 300 full-time and 1,376 seasonal, part-time and student staff (when converting seasonal and part-time hours, this is a full-time equivalent of approximately 900 positions) during the 2014 high season. There are 646 unionized employees and 839 students, part time contract and apprentice staff. Of the unionized staff, OPSEU represents 555 Park and Police employees and Workers United Canada Council represents 91 restaurant servers. This staffing complement is expected to remain relatively constant during the planning period.

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

Overall staffing levels remain unchanged in fiscal 2016/2017 over fiscal 2015/2016. While NPC continues to reorganize to ensure optimal efficiencies, NPC is not planning for significant increases or decreases in its overall staff levels over the next three years.

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

Summary of 2015/2016 Results, 2016/2017 Approved Budget and 2018-2020 Forecasted Results

For the year ended March 31, 2016, NPC is projecting to achieve a surplus in its operating results of \$3.255 million. This will be a positive variance of \$4.701 million from budget, a result of increased revenues of \$7.171 million, less additional expenses of \$2.596 million. Strong performance from retail, attractions, parking and culinary operations contributed to the positive results.

Highlights of the projected financial results for NPC for the year ended March 31 are summarized in Table 10.1 below. The Budget for 2016/2017, approved by the Board on December 18, 2015, and a forecast of the following three years 2018 – 2020 are also included in Table 10.1.

A significant contribution to NPC's revenues is derived from lease of the Boat Tour Service, which commenced with a new operator, Hornblower Niagara Cruises in January 2013. These lease revenues include a base rent plus a guaranteed minimum variable percentage for the first five years, ending December 31, 2018. The budgets for fiscal 2017 – 2019 reflect these guaranteed revenues. The budget for the year ending March 2020 reflects the expected lease revenue from

base rent plus variable rent based on projected attendance of approximately 1.9 million passengers (2015/2016 actual: 1.818 million passengers).

<i>(in thousands of dollars)</i>	CURRENT FISCAL YEAR			FUTURE YEARS			
	BUDGET	PROJECTION	VARIANCE TO BUDGET	BUDGET			
	Apr. 2015 Mar. 2016	Apr. 2015 Mar. 2016	Apr. 2015 Mar. 2016	Apr. 2016 Mar.2017	Apr. 2017 Mar.2018	Apr. 2018 Mar.2019	Apr. 2019 Mar.2020
Revenue Producing Operations							
Attractions	\$ 17,288	\$ 19,090	\$ 1,802	\$ 19,103	\$ 19,486	\$ 19,875	\$ 20,423
Retail	\$ 18,224	\$ 20,423	\$ 2,199	\$ 20,007	\$ 20,407	\$ 20,816	\$ 21,232
Culinary	\$ 15,852	\$ 17,117	\$ 1,265	\$ 16,721	\$ 17,055	\$ 17,396	\$ 17,744
Parking/Transportation	\$ 10,615	\$ 12,322	\$ 1,707	\$ 12,144	\$ 12,386	\$ 12,634	\$ 12,887
Golf	\$ 3,923	\$ 3,404	\$ (519)	\$ 3,850	\$ 3,927	\$ 4,006	\$ 4,086
Events	\$ 728	\$ 851	\$ 123	\$ 854	\$ 871	\$ 888	\$ 906
Heritage	\$ 421	\$ 415	\$ (6)	\$ 409	\$ 418	\$ 426	\$ 434
Total Revenue Producing Operations	\$ 67,051	\$ 73,622	\$ 6,571	\$ 73,088	\$ 74,550	\$ 76,041	\$ 77,712
Land Rent - Ontario Power Generation	\$ 6,899	\$ 6,913	\$ 14	\$ 6,997	\$ 7,102	\$ 7,209	\$ 7,317
Commission Rentals & Fees	\$ 174	\$ 125	\$ (49)	\$ 154	\$ 157	\$ 160	\$ 163
Boat Tour Revenue	\$ 12,725	\$ 12,725	\$ -	\$ 13,035	\$ 13,342	\$ 16,002	\$ 12,625
Zipline	\$ -	\$ -	\$ -	\$ 1,292	\$ 2,083	\$ 2,125	\$ 2,167
Sundry	\$ 525	\$ 1,160	\$ 635	\$ 835	\$ 850	\$ 850	\$ 850
Total Revenue	\$ 87,374	\$ 94,545	\$ 7,171	\$ 95,401	\$ 98,084	\$ 102,387	\$ 100,834
Expenses							
Revenue Producing Operations							
Cost of Goods Sold	\$ 11,207	\$ 12,601	\$ 1,394	\$ 12,008	\$ 12,375	\$ 12,623	\$ 12,900
Operating Expenses	\$ 35,730	\$ 36,284	\$ 554	\$ 36,965	\$ 38,153	\$ 38,916	\$ 39,772
Horticulture	\$ 9,391	\$ 9,336	\$ (55)	\$ 9,699	\$ 9,893	\$ 10,091	\$ 10,293
Engineering	\$ 5,897	\$ 6,125	\$ 228	\$ 6,255	\$ 6,380	\$ 6,508	\$ 6,638
Police and Administration	\$ 13,285	\$ 13,779	\$ 494	\$ 13,670	\$ 13,926	\$ 14,187	\$ 14,453
Group Sales	\$ 1,490	\$ 1,348	\$ (142)	\$ 1,356	\$ 1,376	\$ 1,397	\$ 1,418
Marketing	\$ 2,106	\$ 2,229	\$ 123	\$ 2,518	\$ 2,556	\$ 2,594	\$ 2,633
Total Expenses	\$ 79,106	\$ 81,702	\$ 2,596	\$ 82,471	\$ 84,660	\$ 86,316	\$ 88,107
Net Surplus/Deficit Before Interest & Depreciation	\$ 8,268	\$ 12,843	\$ 4,575	\$ 12,930	\$ 13,424	\$ 16,071	\$ 12,727
Loan Interest	\$ 1,646	\$ 1,596	\$ (50)	\$ 1,513	\$ 1,426	\$ 1,331	\$ 1,228
Amortization of tangible capital assets	\$ 8,728	\$ 8,652	\$ (76)	\$ 9,032	\$ 9,070	\$ 9,070	\$ 9,070
Amortization of deferred capital funding	\$ (1,365)	\$ (1,365)	\$ -	\$ (1,670)	\$ (1,670)	\$ (1,670)	\$ (1,670)
Net increase in Power Plant Obligation	\$ 705	\$ 705	\$ -	\$ 705	\$ 705	\$ 705	\$ 705
Net surplus/(deficit)	\$ (1,446)	\$ 3,255	\$ 4,701	\$ 3,350	\$ 3,893	\$ 6,635	\$ 3,394

April 1, 2015 to March 31, 2016

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

The traditional Adventure Pass (4 attractions plus transportation) was supplemented by a new package option, the Adventure Pass Plus with 4 additional attractions, for an additional \$25 per pass, and the Adventure Pass Plus option proved to be a very popular product in 2016. Pass sales increasing by 20% from 235,000 passes in the 2014/2015 to 279,000 passes in 2015/2016, and pass revenues increased by 34%, due to the higher margin on the Adventure Pass Plus Product. An early opening of the Boat Tour (April 30) and favourable weather throughout the peak season contributed to the results in revenues.

Ice damage to Whirlpool Golf Course greens, leading to a delay in the course opening until late June 2015. The impact resulted in reduced revenues for the 2015 season, and a total reduction in revenues to the golf budget of \$519 thousand.

April 1, 2016 – March 31, 2017 Budget

The fiscal 2017 Operating budget reflected in Table 10.1 above, provides earnings before interest, depreciation/amortization of \$12.93 million. The forecast for 2018 - 2020 reflects a positive trend with revenues at a level which are expected to cover all costs, including depreciation and amortization of power plants and provide funding for capital asset renewal. NPC receives only capital grants from the Province of Ontario. No operating grants are received from the Province. The forecast includes revenues from the start-up of NPC's new Zip Line Attractions in Spring 2016. The Zip Line Program, installed and operated through a third party, is a new venture that was approved by the Board, with the lease agreement finalized in November 2015.

This revenue level will permit NPC to undertake a number of crucial repairs, upgrades to its facilities and operational activities that have been deferred due to lack of funding. Scheduling of capital works improvements includes contingency planning should revenues not reach expected levels. Achievement of a positive financial position is one of the objectives identified in NPC's 2013-2017 Strategic Plan.

Assumptions

The following assumptions were used in preparing the forecast:

- The forecasts are based on revenues and attendance at similar levels to 2015/2016 for Attractions, Retail and Parking and with reference to the three year average (2012–2014) for culinary operations.
- The increase in boat tour revenues each year are based on the new boat tour lease arrangement with Hornblower. These revenues are guaranteed to NPC until December 2019.
- Adventure pass sales are presumed to remain at the same levels as in 2015/2016 operating season (279,000 passes).
- Revenues include projected new revenues from the phasing of a potential Zip Line program commencing in 2016.
- Revenues budgeted for second level Table Rock operations are based on a full year of operation for the Falls Incline.
- Revenues earned from Attractions are based on prices approved at December 2015 Commission meeting.
- Revenue operations reflect recently negotiated third party agreements as identified in Section 7 of this Business Plan.
- Retail revenues are assumed to include the longer operating season and extended hours at the Grand View Boat Tour plaza, as well as merchandise and fixture changes at Table Rock and Victoria Park retail outlets.
- Parking fare and licensing revenues reflect the implementation of a new parking strategy, including a new solar parking contract.
- The budget reflects the use of ambassadors to enhance visitor experience.
- The Human Resources budget incorporates resources to implement the recommendations of the operational review conducted in 2013.
- Salary & Wage assumptions include a 2.5% increase from the OPSEU Collective Bargaining Agreement effective November 2016, legislated increases to minimum wage, and

contingency allowance for potential non-union cost of living increases along with changes which may result from the job re-evaluation project.

- General rate of inflation at 2% for expenditures, except where prices are fixed by existing contracts.
- Utilities increases: 5% hydro; 1% water/wastewater; 2% natural gas.
- Insurance premiums reflect a reduction (\$140 thousand) due to competitive quotes for the October 2015 renewal.
- Rent for the Dunn St Administration facility will discontinue at the end of May 2016 as staff move to other renovated Administrative buildings owned by NPC. This will result in 10 months of rent savings, a reduction in expense of \$136 thousand from the previous year.
- NPC will sponsor the American Parks & Garden Association event, and improve the Botanical Gardens in preparation for the event, for an estimated cost of \$75 thousand.
- NPC will be undertaking the preparation of a Master Plan over the next three years, commencing with the Core Area in the vicinity of Queen Victoria Park, Grandview and Table Rock at an estimated cost of \$100 thousand in 2016/2017.

2016 - 2018 Capital Works Plan

Specific capital works to be completed in the 2016/2017 fiscal year, from funds generated by NPC operations are identified in Table 10.2 below:

Project Title	(Thousands of \$'s)	Priority Criteria				
		Safety & Regulatory	Strategic Initiative	Attraction Renewal	Asset Life	
					Maintenance	Cycle
Aerocar 100th Anniversary - Attraction Renewal	\$ 200			\$ 200		
Floral Showhouse - Watermain and Windows	\$ 300				\$ 300	
Table Rock - Redesign Grand Hall Welcome Centre	\$ 125			\$ 125		
Butterfly Conservatory - renovate exhibit and open space area	\$ 85			\$ 85		
Marina Improvements	\$ 50			\$ 50		
Oakes Garden Theatre	\$ 565		\$ 565			
Miniature Village	\$ 100			\$ 100		
Police Radios	\$ 350	\$ 350				
Admin Facilities - DC Training Room and Storage Facility	\$ 235					\$ 235
Falls Parking Lot Cash Booths	\$ 150					\$ 150
Upgrade Traffic Signal at Fraser Hill	\$ 40				\$ 40	
Information Technology	\$ 898	\$ 75				\$ 823
Culvert/Drainage Improvements/Roads	\$ 450				\$ 450	
Golf - Carts and Maintenance Equipment	\$ 400				\$ 400	
Fleet - Life Cycle	\$ 300				\$ 300	
Heavy Equipment	\$ 600				\$ 600	
Facility and Equipment Upgrades - Culinary Facilities	\$ 785				\$ 785	
Facility and Equipment Upgrades - Retail Facilities	\$ 367				\$ 367	
	\$ 6,000	\$ 425	\$ 565	\$ 560	\$ 3,242	\$ 1,208

Due to strong performance in the 2016 fiscal year, and similar forecasted performance in 2017, this capital spending level is almost double the amount approved for the previous year.

Funding from External Sources

Ministry Grants

In addition to funding available from NPC's own operations, Tourism Agency Branch (TAB) has provided NPC with funding towards critical projects, for the Provincial fiscal periods ended March 31 as indicated below in Table 10.3:

2013-14	\$56,115
2014-15	\$1,858,397
2015-16	\$1,912,155

In addition, in 2012/2013 NPC received \$7 million for the Incline Railway, \$54,000 for the Cullen Miniature Village restoration project, and \$2 million for Parkway Paving. NPC has also benefited from the Federal/Provincial Infrastructure initiatives through an agreement with the City of Niagara Falls for a new WEGO fleet, as well as capital funding for improvements to the Parkway and Bus shelters/infrastructure of \$5.9 million.

For the year ended March 31, 2016, NPC applied for funding and received approval for \$1,912,155 from the Ministry of Tourism, Culture & Sport with all projects to be completed by March 31, 2016.

Project Description	Approved Funding
Power Plant Condition Assessment	\$331,170
Maintenance Centre Roof Replacement	\$700,000
Emergency Evacuation, White Water Walk	\$60,985
Candy Planet Masonry Repairs	\$100,000
Elevator Replacement, Journey	\$300,000
Electrical System Upgrades	\$200,000
Emergency/Safety	\$100,000
Replacement of Skylights	\$80,000
Replacement of Storefront Doors	\$40,000
Total	\$1,912,155

NPC will be preparing a further application for provincial funding for projects for fiscal 2017.

Debt Financing

NPC's outstanding long term debt as at March 31, 2016 is \$28.3 million, with annual principal and interest charges of \$3.211 million due annually, until the debt is retired in April 2027. This financing relates to the redevelopment of the Table Rock Complex which was completed in 2007.

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

- Re-development of Queen Victoria Place, a premier location adjacent to the Falls. The VFA condition assessment of this site identified numerous systems requiring upgrading and replacement. Further study is scheduled for 2017 and options will include consideration of revenue generating operations and opportunities to enhance visitor experience.

- Replacement of the irrigation system which supports NPC’s Botanical Gardens, School of Horticulture, Butterfly Conservatory and Whirlpool Golf Course.

The use of debt financing in the Asset Management Plan balance the need to limit further deterioration of capital facilities and take advantage of opportunities to generate additional revenue/return on investment, with the availability of earnings from operations to service debt charges and fund ongoing operating activities. No issuance of debt is being recommended for the 2017 year.

Should additional funding become available through either internal or external sources, projects that are currently deferred to 2017/2018 and later years can be advanced for completion in 2016/2017.

Foundations or Donations

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

Other External Revenues

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

Asset Management Plan

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

<i>(millions)</i>	Buildings & Structures	Equipment	Vehicles	Total
Historical Cost	\$228	\$41	\$4	\$273
Useful Life	7 – 40 years	3-10 years	10-12 years	
Annual Amortization Charge	\$6.46	\$1.56	\$0.15	\$8.17
Net Book Value	\$120.0	\$4.3	\$0.8	\$125.1
Net Book Value as a Percentage of cost	53%	10%	20%	

The annual amortization charge of \$8.17 million represents the amount by which tangible capital assets depreciated during the year, and the minimum amount by which NPC should be investing in its capital program on an annual basis, in order to avoid further decline in its assets. This \$8.17 million amount is based on historical costs and does not include funding for inflation, or for assets that are fully depreciated from an accounting perspective, but are still in use, and it does not include funding for service enhancement.

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

- State of Infrastructure (condition assessment)
- Levels of Service (various planning and engineering studies, space planning, master plans, strategic plan – further study required in 2017 - 2019 to determine 10 year needs analysis)
- Replacement Strategy (10 year asset replacement plan informed by studies)

- Financing Strategy (10 year funding strategy, including funding from operations, debt financing, grants, donations, public private partnerships and other external sources)

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

State of Infrastructure - Condition Assessment

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

The AMIS project has provided a current cost estimate of deficiencies of \$157.21 million, including deficiencies in specific structural items, such as electrical systems, roofing, window etc. This amount of \$157.21 million includes an amount for similar deficiencies in Power Plant buildings quantified at \$26.67 million. 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.

NPC has received provincial funding of \$1.55 million to assist in the stabilization mothball process. NPC has been approved for additional funding of \$245,590 to complete a condition assessment study of the three generating stations.

The current status of deficiencies (capital requirements) based on the AMIS reports as at November, 2015, inspected by VFA are identified in Table 10.6 below. The Table includes *above ground* structures of the Power Plants that have been inspected by VFA. None of the underground infrastructure of the Power Plants has been assessed or included in the figures.

<i>(millions)</i>	NPC Operations	Power Plants	Total Nov 2015
Currently Critical	\$ 4.21	\$ 6.67	\$ 10.88
Asset Integrity – Imminent Failure	7.88	0.44	8.32
Asset Integrity – Proactive	117.36	19.33	136.69
Code compliance & Legislative	0.75	0.07	0.82
Discretionary	0.34	0.16	0.50
Total capital deficiency, Nov 2015	\$ 130.54	\$ 26.67	\$ 157.21
Total capital deficiency, Nov 2014	\$ 116.25	\$ 21.30	\$ 137.55

Table 10.7 contains a more detailed breakdown of the capital requirements by type of asset totalling \$130.544 million identified for NPC operations, excluding the requirements for the Power Plant assets. In November 2014, NPC had \$14.8 million in capital assets (excluding Power Plants) categorized as Currently Critical, Compliance & Legislative Requirement and Asset

Integrity/Imminent Breakdown. With capital works completed during 2015, these categories of urgent capital repairs has been reduced by \$2 million to \$12.846 million.

System Group and Priority	1a - Currently Critical	1b- Code Compliance and Legislative	3 - Asset Integrity Type A - Imminent Breakdown	5 - Asset Integrity Type C -Proactive Replacement	8 - Discretionary	Total November 2015	Total November 2014 Comparative
Electrical System	650,262	128,507	92,187	19,815,740	81,092	20,767,788	18,831,439
Equipment	0	0	0	35,526	0	35,526	27,706
Equipment and Furnishings	0	0	30,596	1,654,006	0	1,684,602	1,108,651
Exterior Enclosure	932,821	11,098	463,803	13,130,938	126,396	14,665,056	13,647,152
Fire Protection	52,137	0	0	665,258	0	717,395	235,231
HVAC System	7,051	18,030	1,912	25,800,041	0	25,827,034	21,444,015
Interior Construction and Conveyance	104,460	259,391	0	18,148,533	32,550	18,544,934	14,581,934
Plumbing System	47,454	0	0	4,316,815	54,049	4,418,318	4,402,083
Site	2,124,153	0	7,281,209	29,518,941	21,609	38,945,912	36,427,950
Special Construction	0	0	0	3,432,301	0	3,432,301	3,854,798
Structure	141,505	37,630	2,285	798,014	21,609	1,001,043	1,146,974
Not Applicable	154,180	300,216	5,299	45,233	0	504,928	541,515
Total Nov 2015	4,214,023	754,872	7,877,291	117,361,346	337,305	130,544,837	116,249,448
Total Nov 2014 Comparative	5,919,172	808,247	8,143,112	101,045,324	333,593	116,249,448	

Asset Replacement Strategy

Summarized in Table 10.8 are the projected capital funding sources forecasted for 2017-2025, as well as the planned replacement strategy for various categories of capital works. Based on forecasted earnings from Operations and estimated Provincial/Federal Grant revenues projected in Table 10.8, NPC expects to complete all of the Currently Critical, Code Compliance and Imminent Breakdown projects by fiscal 2019 and begin a pro-active replacement strategy. A portion of earnings will be retained in the first three year as a contingency for variance in projected revenues that may impact available cash flow, and the majority of capital works will be completed in the last two quarters of the fiscal year, after peak season operating results are known.

	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026
Earnings before interest & Depreciation	12,930	13,424	16,071	12,727	12,982	13,241	13,506	13,776	14,052	14,333
Provincial Grant*	2,560	2,600	2,600	2,600	2,600	2,600	2,600	2,600	2,600	2,600
Federal Grant - Pergola Wall	500									
Retention for cash flow contingency	(3,719)	(2,500)	(2,500)							
Principle & Interest on Debt Charges**	(3,211)	(3,211)	(3,211)	(3,211)	(3,211)	(3,211)	(3,211)	(3,211)	(3,211)	(3,211)
Capital Funding Forecast	9,060	10,313	12,960	12,116	12,371	12,630	12,895	13,165	13,441	13,722
Capital Expenditure Forecast										
<i>VFA Database Identified Deficiencies in Existing Facilities:</i>										
Currently Critical	3,258	956								
Code Compliance & Legislative	754									
Asset Integrity - Imminent Failure		5,318	2,559							
Discretionary			337							
Asset Integrity - Proactive			4,189	6,124	6,059	6,396	6,237	6,680	6,425	6,974
Total VFA Identified Deficiencies	\$ 4,012	\$ 6,274	\$ 7,085	\$ 6,124	\$ 6,059	\$ 6,396	\$ 6,237	\$ 6,680	\$ 6,425	\$ 6,974
Vehicles & Equipment										
Fleet Life Cycle	300	306	312	318	325	331	338	345	351	359
Equipment Life Cycle	1,000	1,020	1,040	1,061	1,082	1,104	1,126	1,149	1,172	1,195
Police Radios	350									
Technology	898	913	1,012	1,032	1,053	1,074	1,095	1,117	1,140	1,162
Total Vehicle & Equipment	\$ 2,548	\$ 2,239	\$ 2,365	\$ 2,412	\$ 2,460	\$ 2,509	\$ 2,559	\$ 2,611	\$ 2,663	\$ 2,716
Culverts/Drainage/Roads/Signage	\$ 490	\$ 500	\$ 510	\$ 520	\$ 530	\$ 541	\$ 552	\$ 563	\$ 574	\$ 586
Strategic Investments										
Administrative Facilities	235	-	-		200		300		400	
Park Development	1,065	300	1,000	1,020	1,040	1,061	1,082	1,104	1,126	1,149
Attraction Renewal	710	1,000	2,000	2,040	2,081	2,122	2,165	2,208	2,252	2,297
	2,010	1,300	3,000	3,060	3,321	3,184	3,547	3,312	3,778	3,446
Capital Expenditure Forecast	9,060	10,313	12,960	12,116	12,371	12,630	12,895	13,165	13,441	13,722
* Estimate only. Provincial capital funding is subject to review and approval each year										
**Loans mature on April 30, 2027										

11.0 INFORMATION TECHNOLOGY/ELECTRONIC SERVICE DELIVERY PLAN

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

Accomplishments of 2015

Network and Infrastructure Services

- Expanded fiber network to cover the “transaction core” of sites between Floral Showhouse (south) and Grand View Complex (north) including Table Rock, Falls Incline, Falls Parking, Revenue Office, Queen Victoria Park, and Candy Planet. This provides NPC with a reliable, high performance, primary network path.
- Improved security via the use of point to point encryption pin pads during the Moneris payment processor implementation.
- Expanded Wifi for NPC Guests at Falls Parking Incline (for ParaPan Am Games), Table Rock (indoor and outdoor), Whirlpool Golf, Legends Golf, and McFarland House.
- Improved point to point (PTP) radio connections to Parks northern sites (Queenston Heights, Mackenzie Printery, and Laura Secord) via the Queenston Tower.
- Increased physical security controls by installing locking network racks and cabinets for Payment Card Industry compliance.
- Expanded Network Authentication, Authorization, and Accounting (AAA) to networking devices for PCI-DSS Compliance.

Application Services

- Continued Payment Card Industry-Data Security Standards (PCI-DSS) data cleansing and staff education/training.
- NPC RFP for payment processing was awarded to Moneris Solutions early in 2015. New pin pads were deployed before the start of the new season. The pin pads increase Guest convenience with the “tap” option and increase security with the “chip and pin” option. The pin pads were implemented in record time without business interruption.
- Implemented Moneris Hosted solution for NPC TicketOps web site to ensure a more secure payment processing solution for NPC online ticket purchasers.
- Added second factor authentication for employee’s remote access.
- Microsoft conducted a software licensing audit in 2015 Q1 and found all licensing was compliant.
- Twenty-five point-of-sale (POS) units were replaced for attraction ticketing.
- Replaced point-of-sale (POS) units at Laura Secord House and Mackenzie Printery.
- OpenTable, a globally recognized restaurant reservation system was implemented at Elements and Edgewaters restaurants enabling guests to book reservations from anywhere, at any time.
- Developed an electronic job board for Legends Golf Crews to reduce paper and increase efficiencies. Crews can now see scheduled job activities ‘at a glance’.
- A Parks Registry System (PRS) was designed and developed to collect, compile, and track property management information.

- A PCI-DSS compliant retail e-commerce site was launched (<http://shop.niagaraparks.com/>)
- Migrated 400 licensed users from Office 2010 to Office 2013.

Helpdesk Services

- Replaced voicemail system at Rapidsview and Legends on the Niagara locations.
- Replace 8 staff printers with multifunction printers.
- Replaced 35 desktops/laptops that were over 5 years in age.
- On average, IT receives 349.3 tickets and closes 351.8 monthly.
- NPC Information Technology is maintaining service levels, closing 59% of tickets in the same day and 82% of all tickets within the first week of receiving the request.

Plans for 2016-2017

- Improve PCI compliance by educating staff, implementing policies and procedures, further network segmentation, implementing additional security controls, further network monitoring, and additional reporting on PCI-DSS compliance.
- Extend the fiber network to include the Maintenance Center, and Distribution Center to support staff moving from Dunn Street to these facilities.
- Expand Wifi to Maintenance Center, Distribution Center, Oakes Gardens, Floral Showhouse, Aerocar, and Queen Victoria Park.
- Expand fiber network to a second internet provider to provide required redundancy for payment processing.
- Replacing existing analog and copper Bell lines with "voice over IP" (VOIP) where the NPC fiber network is employed.

Information Technology Staff Development

With six of the eight IT staff members under 2 years of NPC service, continual orientation and cross training is occurring in order to strengthen the support team. Additionally, the IT budget supports one course per IT team member to increase functional skills in their perspective IT service area.

12.0 INITIATIVES INVOLVING THIRD PARTIES

NPC continues to work in partnership with a number of organizations. To strengthen accountability by third parties, ensure clarity of roles and responsibilities, and ensure appropriate measures are taken to manage its risks, NPC has moved towards formalizing its arrangements with third parties through formal contracts and agreements. Following is a chart outlining a number of significant third party partnerships to NPC. It should be noted that NPC does not provide grant funding to any of the parties below.

THIRD PARTY NAME	PARTNERSHIP OBJECTIVE	PARTNERSHIP STRATEGY
BUSINESS DEVELOPMENT, EVENTS & PUBLIC RELATIONS		
Falls Fireworks Series	To raise financial support from local stakeholders to present fireworks series within the destination.	Fireworks support business for all partners. NPC cannot present project alone.
Sponsorship Policy	Generate revenue to offset costs of event programming in the Park.	A review of NPC's current Sponsorship Policy has been undertaken and a Report on the Sponsorship Program will be presented in 2016/2017.
Illumination Support of the Falls	NPC is a member of the Niagara Falls Illumination Board. Established in 1925, the Board is a Not for Profit Corporation made up of representatives from the City of Niagara Falls Ontario, Ontario Power Generation Inc., City of Niagara Falls New York, New York State Parks and The Niagara Parks Commission. It is the Illumination Board's responsibility and mandate to finance and maintain the nightly illumination of both the Horseshoe and American Falls.	NPC's over 80 year commitment with the Board is seen as a way to further the enhancement and promotion of the Falls for all those who come to visit. NPC also shares in a revenue strategy with the Board with dinner & tour packages. NPC and Board have completed a review on future enhancement of the current lighting technology, and subject to funding availability, will be implemented in 2016-17.
New Year's Eve	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 PR potential for NPC and the stakeholders. NPC to maintain a yearly decision on participation based on ROI.
WEGO Vehicle Transportation System	In August 2011, NPC and the City of Niagara Falls announced approval of a 10-year contractual agreement to develop an integrated Visitor Transportation System, known as WEGO to provide a seamless connection between tourist areas within the City and The Niagara Parks Commission and its sites and attractions. The rubber tire bus system became operational on August 13, 2012.	Participation in this new integrated system has allowed NPC to modernize its aging bus fleet. As a result of this agreement, NPC received 11 new fully accessible buses (9 articulated/2 single buses) as part of the overall \$50 million in funding provided by the Federal and Provincial governments for this project. NPC's buses were over 25 years old and not accessible. In 2015, NPC's Green Line WEGO service, provided transportation to 290 passengers with scooters and 1,916 passengers in wheelchairs.

Regional Tourism Organization (RTO)	<p>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.</p> <p>NPC currently is a board member of the provincially established RTO in Niagara (RTO #2); one of 13 provincial tourism regions, which co-ordinates the diverse interests of the tourism community throughout the Niagara region.</p>	<p>NPC lends leadership by serving on the Board of the RTO. Given's NPC's limited marketing budget, participation in the RTO allows NPC to be able to take part in and help influence the cooperative advertising and marketing strategies undertaken to promote visitation to and increased stays within the region.</p>
Scotiabank Convention Centre	<p>NPC is a founding partner in the Scotiabank Convention Centre in Niagara Falls. NPC has a seat on the Board of Directors.</p>	<p>NPC supports the Convention Centre to help draw meetings and conventions to the destination and NPC receives spin-off business from those conventions.</p>
Niagara Falls Tourism	<p>NPC is a member on the Executive and Board for the local destination marketing organization.</p>	<p>Tourism is a critical part of NPC's business and having a strong and well-performing DMO is important in providing marketing programs that benefit the destination and NPC.</p>
Winter Festival of Lights	<p>NPC is a founding partner in this community event, which has now taken place for 33 years. NPC serves on the Board – NPC's GM currently serves as Board Chair. A large part of the WFOL event's program takes place on NPC land.</p>	<p>The event is an anchor to the early winter program for the destination and draws visitors to Niagara Falls. The WFOL is currently in the 2nd year of a 5 year revitalization program, which is not only enhancing the quality of the offerings, but expanding the celebrations throughout the community.</p>
PARKS		
Environment Canada (Habitat Stewardship Program and Great Lakes Sustainability Fund) and the Ontario Ministry of Natural Resources (Species at Risk Stewardship Fund)	<p>To acquire resources needed to protect, maintain, and preserve natural areas that make up 25% of NPC lands. In addition, resources are used for education and outreach both internally and externally.</p>	<p>By providing matching funding for the preservation and restoration of natural areas in the care of the NPC.</p>
Niagara College and Brock University	<p>Provision of year-long thesis projects for various Environmental, Recreational, and Technical programs to support NPC Stewardship program and Botanical Gardens. The in-kind value is estimated at \$100,000.</p>	<p>Provide in-kind support in the form of research projects which provide NPC staff with valuable data for moving forward with environmental as well as technological initiatives.</p>
Corporate and non-profit support (OPG, Friends Groups, Naturalists, NPCA, Land Care Niagara, NRC, MNR, Ontario Access Coalition (Boulderers), Royal Astronomical Society)	<p>Alliances have allowed for environmental, educational, and recreational initiatives that we would not have the internal resources to achieve.</p>	<p>Partnerships provide support for numerous preservation and restoration activities on NPC lands.</p>

Club – Niagara Centre, Niagara Geological Society)		
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, students and Niagara residents to develop capacity for tree seed supplies. Enhances access to Ontario's 50 Million Trees Program. Future opportunities may include facilitating on the ground research for tree propagation.
Ontario Power Generation	Improvements on the Lands, Protection Program.	Native Plant Nursery License Agreement and donation of land.
Monarch Teachers Network, Toronto and Region Conservation Authority and Niagara Falls Nature Club	To increase NPC Butterfly Conservatory educational programming and outreach, in addition to revenue generating opportunities through sales of teaching kits.	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.
Parks Canada	Programming Partner	Collaboration on events and tours; cross promotional opportunities as appropriate.
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 Related organizations (Greater Niagara Circle Route, TransCanada Trail, Waterfront Trail, Greenbelt Route, Ontario Trails Council, Venture Niagara, Ontario by Bike)	Increase promotion and development of cycling opportunities and infrastructure within Niagara Parks and surrounding region.	Provides opportunities for joint marketing initiatives, access to funding, and trail management expertise as it relates to the Niagara River Recreation Trail.
HERITAGE		
Federal Government	Redevelopment of Historic Sites	Infrastructure Funding
Town of Niagara-on-the-Lake War of 1812 Bicentennial Committee Working Group	Landscape of Nations Memorial at Queenston Heights Park.	NPC is a member of Working Group, which has been successful in obtaining funding and support for a War of 1812 <i>Landscape of Nations</i> native memorial to place on the groups of Queenston Heights Park.
Printery Group	Maintain the Printery Collection.	Grants, volunteers, collections \$20,000.
SCHOOL OF HORTICULTURE		
Olds College, Olds Alberta	Articulation agreement for Niagara Parks School of Horticulture graduates to obtain a Bachelor of Applied Science Degree (block transfer).	Supports Corporate Excellence objective in building the Niagara Parks School of Horticulture program as a national program of recognition.

Awaji Landscape Planning and Horticulture Academy (ALPHA Academy), Hyogo, Japan	Exchange program allows Japanese students to attend the NPC School of Horticulture for advanced study to earn a one year certificate; Niagara Parks School of Horticulture students have an opportunity to seek internship placements in Japan to complete required components of the Niagara Parks program.	Supports Corporate Excellence objective in building the Niagara Parks School of Horticulture program globally.
Professional Land Care Network (PLANET), United States	This governing body of the landscape industry for North America has accredited the Niagara Parks School of Horticulture program as being the equivalent of a four-year bachelor degree program.	Supports Corporate Excellence objective in building the Niagara Parks School of Horticulture program as a national program of recognition.
City of Niagara Falls	Schools in Bloom program - Niagara Parks School of Horticulture students actively participate in a consultative capacity with all Niagara Falls High Schools to beautify school properties and engage young people in horticulture.	Supports Corporate Excellence objective. Demonstrates commitment to Natural and Cultural Stewardship.
Niagara Catholic District School Board	This partnership allows high school students enrolled in horticulture and a High Skills Major program in horticulture to complete their studies at the Botanical Gardens with a hybrid teaching model using class lectures with studies in the gardens and working with Niagara Parks' students.	Supports growth of Niagara Parks diploma program through enhanced reach to potential future students; increases applicants to program.
District School Board of Niagara	Agreements to provide a learning site for high school students to advance their horticultural education and High Skills Major program within the Botanical Gardens (final agreement pending).	Supports growth of Niagara Parks diploma program through enhanced reach to potential future students; increases applicants to program.
Canadian Wildlife Federation	MOU developed to enable collaborative activities between both organizations with a focus on education.	Supports development of Niagara Parks educational programming for NPC 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 and School of Horticulture and other Canadian gardens/tourism experiences, education opportunities and to cultivate joint marketing strategies.	Provides opportunity for joint marketing initiatives, and access to resources from participating members; requiring further study to develop staffing plan.
Master Gardeners of Ontario, Garden Club of Niagara & 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.
CORPORATE SERVICES		
Vendors of Record For Various Contracted Services	Ensure efficient and effective delivery of services or provision of goods, in keeping with NPC Mandate, Vision and Standards.	Competitive procurement with detailed specifications and agreements to meet NPC objectives.

13.0 IMPLEMENTATION PLAN

Sufficient resources have been incorporated in the 2016–2019 budgets to accomplish the current and forthcoming activities and programs identified in Section 4.

Attraction Renewal

During 2017, NPC will undertake planning and investigation to revitalize several of its attractions and the construction will be conducted through vendors procured through competitive processes.

Aerocar 100th Anniversary

Design of changes to the Aerocar will be conducted by NPC's Vendor of Record for architectural services which was competitively procured during 2014. Following detailed design, a competitive tender for construction will be issued, with project management by NPC Engineering staff. The scheduled date for completion is May 2017.

Illumination Tower

Working on behalf of the Illumination Board, NPC issued an RFP for substantial lighting improvements for the American and Horseshoe Falls. Advancement of this project in 2016/2017 is contingent upon the ability of the Niagara Falls Illumination Board to raise the required funds in order to execute the project. NPC will oversee the project, once funding sources have been confirmed.

Zip Line Program

NPC has entered into an agreement and operating lease with Niagara Adventure Excursions (NAE), through a competitive procurement process, for the operation of a new Zip Line Attraction at the Falls, as well as an Aerial Adventure Course at NPC's Thompson Point location, for a 10 year concession, with a 5 year option to renew by mutual agreement. NAE has commenced the necessary engineering and design studies and construction of the equipment in the demised area of the approved lease. Start-up is scheduled for Spring 2016.

Asset Management/Deferred Maintenance

The amount available to fund NPC's capital needs and the prioritization process is identified in Section 10. NPC will continue to address critical deficiencies in infrastructure, and is continuing with the completion of the asset inventory, with assistance from VFA consultants.

During 2016/2017, NPC will continue the development of a long term asset management plan, including various background studies required to further assess condition of assets, options for restoration and cost estimates. Several projects have been identified to address the most urgent improvements required.

- Butterfly Conservatory – renovate exhibit area and open space gathering area at front entrance
- Floral Show house – boiler
- Table Rock – redesign Grand Hall Welcome Centre
- Police Radio Replacement Project

Space Planning Study—Administrative Facilities – Centralized Records Storage

This project includes modifications to the Distribution Centre #2 building to accommodate the need for records storage. It will be included in the tender for renovations to the building for administrative space, with construction to be completed by June 2016.

Niagara Parks Marina (Miller’s Creek) Redevelopment

During 2016/2017, NPC will be conducting an RFQ/RFP process, based on information obtained through an RFI process undertaken in 2015/2016. The process is being overseen by NPC’s Fairness Consultant.

Business Rationalization–Finance, Procurement, Human Resources and Technology

During 2017-2019, NPC will continue with the modernization of its technology and Corporate Services support systems. The new payroll/timekeeping/HRIS Software and Service (SaaS) solution will be implemented in the Fall of 2016. During 2016/2017, NPC will begin investigation of new revenue related technologies (Point of Sale, Ticketing, Group Booking, Customer Relations Management and e-Commerce solutions) through an RFI process, with RFP and project implementation targeted for 2017.

Power Plants – Adaptive Re-use of Historical Generating Stations

The following next steps are proposed during 2017-2019:

1. Complete the Gap Analysis.
2. Undertake short term remedial steps as required on a priority basis regarding condition of structures to address potential safety concerns and prevent further deterioration/irreversible decay (e.g. load limit signage, regular inspections and basic building maintenance such as window replacement); competitive procurement documents will be prepared with assistance from NPC VOR, the Ventin Group, where required.
3. Conduct World Café visioning exercises with internal and external stakeholders.
4. Determine feasible long-term strategy for power stations.
5. Address outstanding proposed lead paint settlement with OPG (with Ministry engagement)
6. Explore revenue opportunities available relating to water rights payments.
7. Continue work using an NPC Board “ad-hoc” working committee to focus efforts on the long-term strategy for the power stations; in particular:
 - the continued elevation of concerns to the Province, recognizing that the overall scope of this initiative will necessitate resources beyond NPC’s capacity and expertise (e.g. Ministry of Energy, Infrastructure Ontario); and,
 - the development of strategies to address financial obligations and accountability for the power stations and related infrastructure.

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

Oakes Garden Theatre

The reconstruction of Oakes Garden Theatre will be implemented through external contractors selected through competitive procurement processes.

Tree Planting Initiatives & Emerald Ash Borer

Emerald Ash Borer (EAB) has been found throughout Niagara Parks resulting in a decline of ash tree health. Using good forestry practices, NPC will harvest infected ash trees while they are still merchantable for value of lumber or firewood, and accessible due to associated safety risks. NPC is implementing the removal of 30-40% of the existing stand of ash to open up the forest canopy to promote growth of other tree species as well as provide areas for further native trees to be

planted. During 2015/2016, NPC is securing a sawmill operator to harvest some of the existing ash trees while they are still merchantable (useful for lumber, firewood, etc.) based on the low intensity thinning plan that was developed by a Registered Professional Forester in the spring 2015. In the spring 2016 replanting of these areas, with other native tree species, will occur.

The forest management plan also considers the sensitivity to neighbouring landowners, leaving a forested buffer zone to limit the potential aesthetic impacts of the harvest. Harvesting activities are only done during the winter months to reduce impacts to surrounding vegetation and NPC operations.

Revenue Generating Opportunities (RGO) Plan – Upcoming Renewals

NPC has several RGO's that are provided by third parties. 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. RGO's that are to be provided by third parties are established through a competitive procurement process, with contractual agreements reviewed and approved by NPC's solicitor. During 2015, a standard template for NPC RGO third party agreements was developed by NPC legal and procurement staff to expedite the RGO procurement process. The template has now been incorporated into new RGO procurement requests.

14.0 COMMUNICATION PLAN

In 2016, Corporate Communications will continue to help support and implement the Commission's overall key priorities as identified within this Plan and as part of its overall Strategic Plan. The Strategic Plan embraces three fundamental principles: Positive engagement, Renewal, and Service Improvement. In order to attain these principles, seven key areas of focus have been developed, which will guide NPC's operations over the course of the next several years. These areas of focus include: Research and Development, Human Resources, Partnerships, Facilities and Technology, Finance, Products and Services, and Image.

Background

This plan outlines the approach and recommended tactics to be undertaken in support of the overall Corporate Communications objectives of The Niagara Parks Commission for the 2016 tourism season.

During the year, the Commission received a tremendous benefit from positive local and international media attention, garnering over 13 million in earned media, which helped increase awareness and interest in Niagara Falls and Niagara Parks as a destination worth visiting. From the phenomenon known as the Frozen Falls, to the Rendez-vous Canada tourism showcase and later with Toronto hosting the Pan Am and Parapan Am Games, Ontario and Niagara Parks proved to be a place worth visiting in 2015.

Additional media coverage also obtained during the year included announcements surrounding the development by NPC of a new zip line attraction and aerial adventure course on its properties, as well as the prominent role the Commission played in being a community host site and starting point for the 2015 Pan Am and Parapan Am Games torch relays, respectively.

Early in the year, corporate communications support was also provided as NPC initiated a series of community updates, with presentations made by the NPC Chair and GM to Niagara's four local municipal councils. These updates were well received, as were public sessions held to discuss issues such as NPC's plans to address the impact of the Emerald Ash Borer, as well as plans for the future redevelopment of the Niagara Parks Marina at Miller's Creek.

The 2015 season can therefore be described as one of accomplishment for NPC, both in terms of attaining the Commission's communications and reputational objectives, but also in terms of how those objectives assisted in improving the overall financial performance of the organization.

2016 Business Goals

- Provide both external and internal communications support to the Commission's diverse operational units and revenue-generating departments.
- Further NPC's efforts in both its brand management and reputational objectives, thereby enhancing the overall image and financial performance of the Commission.
- Initiate the development of a new communications policy, in concert with NPC's brand re-development work, to further the corporate objectives and reputation of the Commission.
- Support the efforts required to ensure the successful launch of a new Zip Line attraction and Aerial Adventure Course at Niagara Park.
- Assist in the stakeholder communications needed to further the RFI and eventual RFQ/RFP processes as part of NPC's efforts to revitalize the NPC Marina at Miller's Creek.

- Generate awareness and interest in the significant celebratory milestones to take place in 2016, including the 100th anniversary of the Whirlpool Aero Car, 80th anniversary of the School of Horticulture and Botanical Gardens and the dedication of the new Landscape of Nations Memorial to be placed on the grounds of Queenston Heights Park.
- Build stakeholder awareness and support for NPC's efforts to investigate and address the redevelopment needs of the three former hydro-electric generating stations located on its property.
- Build stakeholder and community awareness and support for the Illumination Board's plans to refresh and renew its existing lighting capabilities.
- Continue to build internal communications efforts in support of NPC's various departmental units and corporate communications objectives, including the launch of NPC's second employee survey, to be conducted in the summer of 2016.

2016 Communications Goals

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

Strategic Considerations

Product and Service Renewal/Celebratory Milestones in 2016

Building on a number of successful projects initiated in 2015 to enhance the overall visitor experience, Niagara Parks has identified several projects to be undertaken in 2016, which will require the support of corporate communications, including:

- Ground breaking and launch of a new Zip Line attraction and Aerial Adventure course within the Park.
- Continued support for the revitalization efforts of the NPC's Marina at Miller's Creek.
- Successful promotion and celebration for the 100th anniversary of NPC's Whirlpool Aero Car and 80th anniversary of the NPC School of Horticulture and Botanical Gardens.
- Dedication of the Landscape of Nations Native Memorial to be placed on the grounds of Queenston Heights Park.
- Build stakeholder and community support for any proposed Falls illumination enhancements plans that are to be developed in 2016.
- Celebrate and promote the restorative work to take place to the Oakes Garden Theatre pergola walls, in anticipation of its 80th anniversary, during Canada's sesquicentennial in 2017.

Enhanced Internal/Employee Communications

The communications unit seeks to support the efforts of the Commission with internal and external stakeholder groups. Increased internal communications capabilities will allow the unit to generate on a consistent basis the quarterly resident bulletins (three produced in 2015), monthly employee newsletters (seven newsletters produced in 2015) and weekly NPC Network Reports, now being produced by the NPC Marketing team. This increased capacity will also permit the unit to better support the various departmental units and their respective 2016 initiatives,

including the release of a second employee survey, which will build on the strengths and benchmark results obtained in 2013.

Build and Strengthen Relationships with Tourism Stakeholders

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

Ownership of Three Former Power Plants

NPC, with the guidance of the Commission's Power Plant sub-committee, is undertaking a review of future use(s) for the three former hydro-electric generating station, including the former OPG Gatehouse and associated underground infrastructure. This work started in 2015 and will continue in earnest in 2016-17. NPC has engaged, through a competitive procurement process, consultant assistance to review past studies, update conditional assessments of the infrastructure and facilitate visioning sessions to position the procurement process for the generating stations. These sites offer opportunities for adaptive re-use and NPC communications will support the public engagement process within staged procurement process.

Changing Media Environment

The media landscape is changing dramatically with the impact of digital communications on traditional media, in particular newspapers. Consolidation is now becoming the norm, and how "new media" frames and positions issues of interest will certainly change deadlines and media capacities.

Such changes present challenges in generating media coverage in traditional media outlets. However, they also present opportunities for NPC to create its own unique content that it can produce and use, as well as distribute via various media and social media outlets.

Key Target Audiences/Stakeholders

- NPC employees
- The Government of Ontario
- Residents of Ontario
- The Government of Canada
- The local community – residents and municipal governments of Niagara Falls, Fort Erie, Niagara-on-the-Lake, and the broader Niagara region
- Tourism organizations such as Niagara Falls Tourism (NFT), Regional Tourism Organization (RTO), Ontario Tourism Marketing Partnership Corporation (OTMPC), Destination Canada, the Travel Industry Association of Canada (TIAC), the Travel Industry Association of Ontario (TIAO), Attractions Ontario, Ontario Culinary Tourism Alliance, attraction operators, local hoteliers, golf course operators
- Local, national and international media
- Tourism visitors

Success Factors

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

Advance preparation and a proactive approach

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

Consistency

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

Employee Communications

In order to ensure a greater consistency in messaging all NPC staff are being made aware of and understand NPC's mission, vision, and goal of becoming one of the most respected park agencies in all of Canada. NPC is one of the largest employers in the region. In addition to Commissioners and senior management, NPC employees have family, friends, and associates in the community and region, all of whom may influence provision of accurate information and strategic directions of the Commission.

Internal communications therefore play an important role in ensuring all employees have accurate information about future direction that NPC will be taking and the reasons behind those decisions. Internal communications will therefore continue to emphasize the vision and objectives contained not only within this Plan and NPC's Strategic Plan, but also in terms of the several new corporate initiatives to be pursued in the upcoming year, including NPC implementation of a new online job applicant tracking process, development of a new electronic pay system, as well as a new records management system and the opportunity to conduct a new employee survey in 2016.

An informed and engaged workplace will therefore be key, as corporate communications undertakes its work in support of the organization in 2016, through specific issue specific communications, as well as NPC's regular employee newsletters and weekly "Network" operations updates.

Media Training

As required, training for media spokespersons is provided. This involves formal media training sessions that include overviews of media relations, as well practice interviews. Refresher courses are available for those who have had limited media training in the past.

Communications Protocol with the Ministry of Tourism, Culture and Sport

While the Commission takes primary responsibility for communicating upcoming decisions/activities; existing Ministry/Agency protocols with respect to Issues Management and Communications also guide communications protocols. The Ministry is to be apprised of significant

public issues, and input sought with respect to key messages and talking points, relating to alignment with government policy.

Commitment to Transparency

NPC is committed to openness and transparency. This will continue to guide all communication initiatives in 2016. Examples of this commitment includes hosting public Commission meetings, posting agenda and media releases on NPC's website and hosting public information sessions on key issues.

Tactics

Media Relations

Corporate communications involving public relations and media relations expertise attracts visitors to NPC and Niagara Falls. This is critical to achieving business and communications goals of this plan given limited advertising and marketing budgets.

Earned media coverage through public relations activities cost-effectively supplements advertising buys, maintains the profile of NPC in major tourism markets and helps open new markets internationally and domestically. Over the past year, NPC public relations and media relations activities generated an estimated \$10.5 million in public relations value.

2016 media relations activities will include:

- Development of a Corporate and Public Relations editorial/event calendar that will identify all events, milestones and other story opportunities throughout the year to ensure ongoing coverage and a proactive approach to media relations;
- Issuing media advisories and news releases for all events of media interest thereby promoting the Parks and providing more reasons for guests from Canada, the United States and international markets to visit and or return to NPC on a regular basis;
- Increasing awareness of the role and importance of the Parks as a provincial and national treasure;
- Promoting Niagara Parks as one of the most respected Parks agencies in Canada;
- Development of joint media relations campaigns and plans with Niagara Adventure Excursions, NPC's new zip line attraction and aerial adventure course partner, to ensure maximum positive international coverage and enthusiasm for these two new attractions is garnered;
- Generate media interest and fulsome coverage of the celebratory milestones and significant projects NPC is to undertake in 2016 – including the 100th anniversary celebration of NPC's Whirlpool Aero Car, 80th anniversary of the NPC School of Horticulture and Botanical Gardens, the restorative work to take place at Oakes Garden Theatre in preparation of its upcoming 80th anniversary and the dedication of a the Landscape of Nations Native Memorial on the grounds of Queenston Heights Park.
- Work with media to build stakeholder awareness and support for NPC's efforts to address the future of three former hydro-electric generating stations that are located on its property;
- Use media to assist in the stakeholder communications efforts required to further the procurement process to support NPC's plans for the revitalization of the Niagara Parks Marina at Miller's Creek; and
- Promote next steps and earn stakeholder and community support for the Illumination Board's plans to refresh and renew its existing lighting capabilities.

Employee Communications

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

- The monthly employee newsletter;
- Memos/Bulletins from the General Manager and/or Chair which have proven to be valuable in communicating important information to staff immediately and unfiltered, on issues of critical importance to the Commission;
- The employee website with all relevant policies, issues and happenings within the Park, including the weekly “NPC Network”;
- On a bi-annual basis, both the Chair and General Manager meet with NPC employees to share information on various topics, including the Commission’s overall financial performance and strategic plan and objectives for the future;
- Smaller, more informal group discussions between management and staff will also continue to take place on a departmental basis, to hear individual concerns and issues faced by employees. Recent Departmental visits by the Executive Team have been well received and NPC management will look to build on these types of initiatives in 2016 and beyond.

Stakeholder Outreach Initiatives

Commission and Public meetings that have been held with residents over the past several years have been successful in demonstrating NPC’s commitment to openness and transparency. In 2016, these initiatives will continue and include:

- Presenting to local municipal councils/public to share valuable information on NPC’s operations and the important partnership role it plays with the community. Not only is this an educational opportunity, it can also be used to help build stakeholder support for issues of importance to the Commission (the Power Plants for example)
- Continuing to hold open commission meetings throughout the year; and
- Hosting an annual accessibility consultation with members of the public to discuss NPC’s efforts in implementing its multi-year accessibility plan, which is required under provincial government legislation as part of the Accessibility for Ontarians with Disabilities Act (AODA).

While NPC has established relationships with local stakeholders such as Niagara Falls Tourism and the Tourism Partnership of Niagara, greater emphasis, briefings and efforts also have to be directed to such groups as the Ontario Tourism Marketing Partnership Corporation, Destination Canada, the Tourism Industry Association of Canada and the Tourism Industry Association of Ontario to better promote Niagara Parks, its issues and its importance to the tourism sector. NPC’s continued role in these organizations is three-fold:

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

Provincial Government Outreach

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

In 2016, NPC will continue with initiatives to increase awareness and understanding of NPC, its mandate, vision and importance, including:

- Briefings and meetings with not only the Minister and Deputy Minister of Tourism, Culture and Sport but also with local and other provincial and federal MPs and MPPs; and
- Participation in Queen’s Park and Parliament Hill “Niagara Days” or “Tourism Days” hosted by the Region of Niagara and tourism organizations such as the CTC and TIAC.

Social Media

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

Speaking Opportunities

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

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

NPC Website

Detailed information is posted on NPC’s corporate website to ensure continued openness and transparency with the public. NPC will continue to enhance this site, as well as its main marketing site www.niagaraparks.com, to further promote the Commission and drive visitation and sales to the Commission. For example, in 2016, as part of its brand redevelopment initiative, NPC will be moving to redesign the look and feel of its website, ensuring not only its continued accessibility but also its availability in multiple languages, thereby increasing its appeal to all visitors.

The implementation of these various tactics will allow NPC to emphasize and strengthen its image and brand and highlight the unique and special role it plays in the Ontario tourism industry. This image and brand is specifically encapsulated in the mission and vision statements adopted by The Niagara Parks Commission.

Marketing Overview

NPC’s advertising and promotions are the responsibility of Marketing, with traditional (print and broadcast) as well as digital (web, mobile and social) media utilized to raise awareness for NPC’s offerings, including the Falls attractions, culinary, golf, heritage, weddings, and nature & gardens. The objective of the Marketing Plan is to fulfill NPC’s Strategic Plan related to focus areas including Research & Development, Partnerships, Image, and Products & Services. A key goal over the next two years is to pursue a comprehensive NPC brand redevelopment, to clearly and effectively

communicate Niagara Parks stories, and ensure that all touch points present consistent and impactful imagery and design themes. Other objectives include:

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

Traditional initiatives to be considered in developing the 2016 Sales & Marketing Plan will include:

- In-park promotional materials including brochures, rack cards, posters and tent cards supporting all passes, attractions, events, golf, dining, shopping;
- In-park displays such as pole banners, venue identification, way-finders, video network;
- Advertising in tourism publications such as those produced by our partners at Tourism Partnership of Niagara (TPN)/Regional Tourism Organization, CAA/AAA and Toronto Tourism Guides, and the OTMPC;
- In-destination signage including highway, ramp and trail blazers; signs
- The development and distribution of our 2016 Visitor's Guide
- Research tracking visitor demographics and satisfaction levels.

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

In 2016, Marketing will once again be developing an annual souvenir brochure, the **2016/2017 Niagara Parks Visitor's Guide** as well as continuing with educational posters designed to enhance the visitor experience and understanding of the NPC story at various attractions.

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

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

Resources were reinstated in 2013 to execute a Customer Satisfaction survey. (An annual tracking study in place since 2001 was suspended in 2012.) The results of this survey provided NPC valuable data on visitor demographics, place of origin and spending habits. An internal reporting system wherein staff input customer postal/zip codes at cash registers to track visitor spending is also in place. These two resources form the basis of NPC's methodology to track the return on advertising investments and will be continued in 2016. As well as the development of a more

comprehensive, integrated audience tracking report, connecting the weekly reporting of individual Business Development departments

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

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

- Search Engine Optimization (SEO) audits continue to identify ongoing changes to ensure that website performance is maximized to increase visitation and online booking revenues
- Ad word buys on Google and Facebook in 2015 garnered significant return on investment and will be key to continue exploring in 2016
- The mobile responsive website will continue to take advantage of growth in the use of devices including iPhones and iPads
- Increased content development and presence on social media will continue to build reach and leads
- The relaunch of the Niagara Parks, Shopify e-store to permit easy and secure online purchasing of retail products, including Falls souvenirs and niche products such as Pop & Lolly's candy, Butterfly merchandise, Golf e-gift certificates
- Completion of a review of online affiliate sales with the objectives of controlling commissions paid and maintaining the integrity of branding, pricing and ticket security
- Implementing a digital Customer Relationship Management strategy for pre-during-and post-consumer engagement via E-Mail, Social Media and Mobile
- Producing and distributing consumer e-Newsletters regularly to the leisure and targeted niche databases to feature events, golf, sales programs and promotions

APPENDIX A - RISK MANAGEMENT ASSESSMENT

Risk	Related Strategic Priority	Impact & Scope Description (Consequences)	Likelihood and Impact	Mitigation Strategies (Action Plans)	Overall Risk Assessment	Risk/Mitigation Funded?	Risk Owner	Target Dates for Mitigation Strategies
<p>Strategic/Policy/Performance - This risk category includes strategic, policy and performance risks as well as political commitment risks and stakeholder/public perception risks. Includes risks related to implementing (or not implementing) new policies or changes to existing policies (ie: misalignment of agency policies with those of the OPS); risk that strategies and policies will fail to achieve targeted results and to provide value for money/cost-effectiveness; risk of not meeting publicly announced government commitments; risk of not meeting public expectations.</p>								
Board Governance	Positive Engagement/Image.	Reputational risk for Niagara Parks Commission, Commissioners and MTCS: public confidence in NPC and Province to appropriately manage public resources; Provincial resources to review and correct.	Likelihood: low	Provincial appointment of Chair and Commissioners. Best practices in governance implemented pursuant to Provincial and KPMG audit. Board orientation of new members; and annual Board retreats to focus on governance and strategic matters. Code of Conduct and NPC Strategic Plan approved by NPC Board. Review of Committee roles and responsibilities through annual update of Committee task lists.	Low	Yes	Minister and NPC Board	Ongoing
			Impact: High					
Fairness Procurement Processes	Positive Engagement/Image.	Risk that there will be legal challenges or public concerns surrounding procurement processes.	Likelihood: Medium	New procurement policies and procedures in place. Fairness consultant Vendor of Record retained to assist with large procurements as required. Public consultation sessions carried out as applicable, media releases and regular communication with stakeholders, as provided in NPC communication, code and procurement policies. Operational review of procurement function by consultant (RFP Solutions) completed and presented to Board in April 2015. Implementation of recommendations to automate form completion and approvals is underway. Additional recommendations related to staffing structure to be implemented by March 2017.	Medium	Yes	General Manager, Senior Management Team and Director of Procurement	Mar-17
			Likelihood: Medium					

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Risk	Related Strategic Priority	Impact & Scope Description (Consequences)	Likelihood and Impact	Mitigation Strategies (Action Plans)	Overall Risk Assessment	Risk/Mitigation Funded?	Risk Owner	Target Dates for Mitigation Strategies
Power Plant contingent liability.	Positive Engagement/Image	Reputational risk for Niagara Parks Commission, Commissioners and Ministry; continued decline of heritage power plant facilities and rising cost of restoration; financial risk related to value of Power Plant Obligation, upon review of existing engineering studies and completion of additional studies during 2015. NPC balance sheet health will continue to be negatively affected in 2016 given undervaluation of degree of capital investment originally expected by 2016 and onward.	Likelihood: Medium	Some maintenance work completed with Provincial funding that was provided. Additional funding has been approved to complete the update of condition assessments. Power Plant Obligation valuation is low based on 2009 projected costs to restore in 2016. A subcommittee of the Board has been established to oversee the process related to stabilization and adaptive re-use of defunct generating stations. Ventin Engineering consultants have been retained to consolidate existing studies and identify information gaps, and assist with procurement of additional studies needed to prepare the engineering information necessary to prepare as a first step to a comprehensive RFP for third parties to assist with redevelopment of the Power Plants. Provincial staff representation on the Power Plant Subcommittee to assist with coordination of reporting/approval requirements and communication of activities to the relevant Provincial ministries.	High	No	NPC Board, General Manager and Senior Management Team	Mar-18
			Impact: High					
New Products, Services and Attractions introduced to destination by NPC - Zip Line and Aerial Adventure Course.	Positive Engagement/Image	Reputational risk for Niagara Parks Commission, Commissioners and Ministry; public acceptance of new attractions.	Likelihood: Medium	NPC processes included a feasibility study, public information centres and media releases. Incorporated public input into decision making. RFP processes overseen by Fairness Consultant including training of evaluation teams for objective rankings and evaluations. Public presentation of RFP results have taken place and public response has been primarily positive. The Lease Agreement was executed pursuant to OIC approval in October 2015. A cross departmental staff committee has been established to oversee the implementation and launch in the spring of 2016.	Medium	Yes	General Manager and Senior Management team	Mar-17
			Impact: Medium					

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Risk	Related Strategic Priority	Impact & Scope Description (Consequences)	Likelihood and Impact	Mitigation Strategies (Action Plans)	Overall Risk Assessment	Risk/Mitigation Funded?	Risk Owner	Target Dates for Mitigation Strategies
<p>Operational - This risk category includes program, service and operational risks. Includes business continuity risks; financial risks; changes in public demand (ie: demographics shifts that can impact attendance); change in demand for services; risks that products or services will not be completed or delivered to quality standards or in a timely manner; risks associated with program efficiency, effectiveness and customer service.</p>								
<p>Not meeting AODA standards</p>	<p>Positive Engagement/ Image; Service Improvement</p>	<p>Reputational risk. Loss of credibility with Province or Public</p>	<p>Likelihood: Low</p>	<p>AODA consultant retained and project plan in place; ongoing meetings with Senior Management Team; NPC budgets include funding for various projects. Consultant has noted NPC is well ahead of most municipalities in implementing new requirements. Successfully completed Employment Standard Requirements in 2014, minor items identified in audit were implemented. NPC tracks all AODA related customer inquiries and follows up to ensure resolution of complaints. Design for public spaces requirements incorporated into 2015 Incline Lower Plaza Redevelopment. AODA formatted service descriptions sheets are being prepared for all Revenue Generating facilities to be available upon request. Staff Accessibility Guide available. Additional front-line training was scheduled in advance of the 2015 Pan Am Games</p>	<p>Low</p>	<p>Yes</p>	<p>Senior Management Team</p>	<p>Dec-20</p>
			<p>Impact: Low</p>					
<p>Capital and operating projects deferred due to revenues lower than budget.</p>	<p>Renewal</p>	<p>Failure to maintain assets to adequate standard, lost business opportunities</p>	<p>Likelihood: Medium</p>	<p>Multi-year capital planning process; Condition assessment project provides details by asset category; new pricing structures implemented; ongoing review of margins for revenue generating operations taking place monthly; identify redundant assets for sale; revenues from new boat tour lease. Monitor revenues/ expenditures; delay some capital against revenue certainty. Additional capital funding provided by Province in 2014/2015 for immediate capital needs. NPC has applied for further capital funding for VFA projects identified as critical and safety related.</p>	<p>Medium</p>	<p>No</p>	<p>Senior Management Team</p>	<p>Mar-17</p>
			<p>Impact: Medium</p>					

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Risk	Related Strategic Priority	Impact & Scope Description (Consequences)	Likelihood and Impact	Mitigation Strategies (Action Plans)	Overall Risk Assessment	Risk/Mitigation Funded?	Risk Owner	Target Dates for Mitigation Strategies
Damage to property results in business interruption during prime season	Renewal	Failure to achieve adequate profit from commercial operations in a manner that ensures NPC remains financial self-sufficient in the long term	Likelihood: Medium	Business Interruption (BI) insurance placed on NPC properties. In order to qualify for BI insurance there has to be direct damage to properties, so not all risks can be mitigated through insurance. Engineering maintains a regular inspection and maintenance plan for high traffic areas and any outages that affect Revenue Producing Operations are immediately rectified.	Medium	Yes	Senior Director of Corporate Services	Ongoing
			Impact: Medium					
Insufficient revenues and/or profitability to sustain operations	Financially self-sufficient	Failure to achieve adequate profit from commercial operations and /or to control costs in a manner that ensures NPC remains financial self-sufficient in the long term	Likelihood: Medium	Line of credit to assist with short term working capital requirements. New boat tour operator lease provides guaranteed revenue stream to assist with addressing infrastructure back log and building working capital; capital investment to renew and revitalize attractions and improve long-term sustainability; examine opportunities for new Revenue Generating Opportunities; review all operations for opportunities to improve profitability.	Medium	Yes – with temporary short term borrowing	General Manager and Senior Management Team	Mar-17
			Impact: High					
Boat Tour Lease implementation	Financially self-sufficient	Significant third party agreement for NPC over 30 year term. New boat products to be implemented (e.g. event centre) in a manner that aligns with NPC mandate.	Likelihood: Medium	NPC approval required for boat tour products. Ongoing meetings with Tenant to resolve matters collaboratively, based on mutual benefit. Dispute mechanisms are contained in lease agreement to facilitate resolution at an early stage if required.	High	Yes - Guaranteed rent for first 5 years.	General Manager and Senior Management Team	Mar-20
			Impact: High					

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Risk	Related Strategic Priority	Impact & Scope Description (Consequences)	Likelihood and Impact	Mitigation Strategies (Action Plans)	Overall Risk Assessment	Risk/Mitigation Funded?	Risk Owner	Target Dates for Mitigation Strategies
Information Technology & Infrastructure - This risk category includes capital project risks and I & IT risks. Includes risks relating to new capital projects including changes in construction costs and project delays; risk that information (ie: performance data) is incomplete or inaccurate; risk that information technology doesn't support business requirements; business continuity risks and IT privacy and security risks.								
Information or technology infrastructure not supporting business requirements	Modernize technology systems	Financial constraints and competing capital needs have resulted in software that has not been updated and hardware that has been failing. The impact is reduced productivity and inefficiency, lost revenues and increased customer wait times. Human Resources/Payroll/Timekeeping technology and Revenue/Ticketing technology are outdated. The business processes affected by these technologies are critical to the organization and modernizing technology in these areas is required to ensure business continuity.	Likelihood: Medium Impact: High	Several new staff with advanced technology skill sets are able to support NPC business needs. New servers and PC's acquired and installed and standardized on Microsoft Office 365; Point of Sale unit replacement program underway; IT Operational review has prioritized recommended strategies to modernize. Workplan has been developed and shared with cross-departmental management team. System and Network Administrators hired. Ongoing replacement of network equipment to improve reliability. Regular bulletins issued to assist users. Helpdesk tracking system implemented. PCI compliance consulting advice and training. Extensive training options provided: - online; classroom; lunch & learn; Modernization of the Human Resources Information Systems, Payroll and Timekeeping technologies is scheduled for completion during fiscal 2017. A procurement for new Revenue/Ticketing software is scheduled for 2016/2017, with implementation during 2017/2018.	Medium	Yes	General Manager and Senior Management team	Mar-18

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Risk	Related Strategic Priority	Impact & Scope Description (Consequences)	Likelihood and Impact	Mitigation Strategies (Action Plans)	Overall Risk Assessment	Risk/Mitigation Funded?	Risk Owner	Target Dates for Mitigation Strategies
Emerald Ash Borer will cause extensive damage to NPC horticultural assets	Condition assessments to collect data to create renewal/restoration strategy	Extensive grouping of emerald ash on Legends Property	Likelihood: Medium Impact: Medium	Emerald Ash Borer is extensively present on NPC grounds. Branch sampling survey of trees was conducted by staff across the grounds to confirm and the Canadian Food Inspection Agency are fully briefed as to scope of infestation. At-risk sites identified and Tree Planting program commenced. Selective harvesting of EAB affected trees following a public consultation process and reforestation at Legends Golf Course.	Medium	Yes...for planning work. Renewal/restoration strategy is being developed in conjunction with Provincial strategy.	Senior Director of Parks	Mar-18
MOU between NPC and Niagara Regional Police Services Board expires in June 2016, FPAC review	Ability to create a welcoming, full service environment responsive to the needs of the customer and ensure that operating environments are safe for both visitors and employees in Canada's most significant international tourism destination.	Special Constable status is only provided on the basis of a renewable MOU with the Region of Niagara Police Service Board. If the status of appointments or MOU are not renewed in future NPC enforcement capacity will be significantly impacted. The Future of Policing Advisory Committee (FPAC) and government's Strategy for a Safer Ontario (SSO) may also have implications for special constables that could affect the current appointments for employees of the Niagara Parks Police Services (NPPS) during the current appointment term (5 years ending May 2020). In the absence of the Niagara Parks Police enforcement would default to the Niagara Regional Police Service (NPRS). NPRS operates on a triage system which means that the calls the Parks Police respond to quickly and with a focus towards customer service and the tourist community will not occur to the same degree. Internal collaboration on events for instance will not be available due to the volume of calls for service waiting in queues for response. All policing assistance for events would be on a paid duty basis.	Likelihood: Medium	The MCSCS approved the renewal of the Niagara Parks Police Special Constable Appointments for 5 years ending June 2020 with no changes to conferred powers. NPC will respond to changes to the status of special constables that may flow from the Strategy for a Safer Ontario as appropriate. Discussion will commence in early 2016 regarding renewal of the MOU for Niagara Parks policing services requirements by the Police Services Board.	Medium	Yes	Board, General Manager and Chief of Police	Mar-17

APPENDIX B - ATTENDANCE SUMMARY

	April 2015 to Mar 2016 Projected	Nov 2013 to Oct 2014 Actual	Nov 2012 to Oct 2013 Actual	Nov 2011 to Oct 2012 Actual
<u>Paid Attractions</u>				
Boat Tour	1,818,446	1,528,334	1,552,349	1,588,639
Journey Behind the Falls	806,870	721,514	689,535	738,862
Butterfly Conservatory	283,507	254,855	283,139	291,940
Whirlpool Aero Car	124,395	93,699	113,343	92,822
White Water Walk	215,867	182,025	201,322	199,443
Sir Adam Beck (Note 1)	-	137	11,766	16,013
Niagara's Fury Note 2)	328,144	300,115	266,113	317,106
Floral Showhouse	37,898	28,129	21,273	18,687
	3,615,127	3,108,808	3,138,840	3,263,512
<u>Golf</u>				
Oak Hall Par 3 Golf Course	1,855	1,858	-	2,806
Whirlpool Golf Course (Note 3)	24,962	19,205	27,079	27,258
Legends on the Niagara	46,785	47,153	50,795	39,179
	73,602	68,216	77,874	69,243
<u>Historic Sites</u>				
Old Fort Erie	13,463	14,356	14,276	18,042
Laura Secord Homestead	5,596	6,261	6,480	6,252
Mackenzie Printery	3,110	3,482	4,667	2,809
McFarland House	2,735	2,924	2,952	3,410
	24,904	27,023	28,375	30,513
<u>Transportation</u>				
People Mover (individual riders)	-	-	-	344,397
Falls Parking Lot	324,424	288,176	280,792	300,578
Falls Incline Railway (Note 4)	936,301	643,270	213,766	614,898
Floral Showhouse Parking	19,160	20,141	23,413	14,226
Butterfly Conservatory Parking	68,781	64,827	65,667	63,790
WEGO Transportation Service (Note 5)	948,224	852,067	923,964	127,285
	2,296,890	1,868,481	1,507,602	1,465,174
	6,010,523	5,072,528	4,752,691	4,828,442
Notes:				
1. Sir Adam Beck Attraction discontinued operations in winter of 2013.				
2. Niagara's Fury was out of service for parts of July in 2013 and substituted for the Aerocar and Butterfly Conservatory.				
3. Whirlpool Golf course 2014 and 2015 opening delayed to early June due to course repairs for winter ice damage.				
4. Falls Incline Railway opened on August 16, 2013 after reconstruction. The Incline was closed December 17, 2013 due to a water main break. It re-opened on May 20, 2014.				
5. WEGO attendance represents Green Line passenger trips.				

*Please Note: December 2015 - March 2016 was projected using the prior year attendance figures for that time period.