



Canadian Museum of
Immigration at Pier 21

Musée canadien de
l'immigration du Quai 21

Corporate Plan
and Operating and Capital Budgets
for 2010-2011 to 2014-2015

SUMMARY

Canada

Canadian Museum of Immigration at Pier 21
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THE CANADIAN MUSEUM OF IMMIGRATION AT PIER 21:
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PREAMBLE

The Board of Trustees of the Canadian Museum of Immigration at Pier 21 is grateful to the founders of the Pier 21 Society and its Board, staff, volunteers and patrons. Their vision and dedication made possible the establishment of a vibrant and powerful museum dedicated primarily to telling the story of the 1.5 million Canadians who passed through the doors of Pier 21. While the Canadian Museum of Immigration at Pier 21 belongs to the people of Canada and has a significantly broader mandate than that of the Society's museum, the Board is committed to upholding the passion and commitment that underscored the Society's success.

During the period leading up to the creation of the Museum, the Minister and the Department of Canadian Heritage provided invaluable support and made funds available for the purpose of establishing the corporation. The Board of Trustees also wishes to express its sincere appreciation to the Minister and the department for their tremendous support, which has made it possible for Canada to launch a national museum dedicated to exploring Canadian immigration and its impact on Canada.

Above all, the Museum wishes to express its deep gratitude to the millions of immigrants who have chosen Canada as their home. Canada is undeniably stronger and richer because of them. The Board and staff of the Canadian Museum for Immigration at Pier 21 pledges to explore and interpret faithfully their experiences and the challenges they faced and to celebrate the innumerable contributions they have made to Canada's culture, economy and way of life.

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1. BACKGROUND

On June 25, 2009, the Prime Minister of Canada announced the federal Government's intention to create a new national museum—only the second to be established in a generation—dedicated to celebrating the history of immigration and the role and contribution of immigrants throughout Canada's history. The museum would be established as a Crown corporation at Pier 21, a National Historic Site on the Halifax waterfront, and would be only the second national museum to be located outside of the National Capital Region. To launch the process, the Government signed a Statement of Intentions with the Pier 21 Society, its Foundation and the Halifax Port Authority, later formalized through a Definitive Agreement.

Just over a year later—on June 7, 2010, the Government tabled Bill C-34 to establish the Canadian Museum of Immigration at Pier 21 (the Museum) through amendments to the *Museums Act*. With the support of all Parties, the legislation received Royal Assent on June 29, 2010. The Legislation came into force on November 25, 2010. That day, the Government also appointed the first seven members to the Museum's Board of Trustees, with an additional two members being appointed on December 9, 2010. The Board held its inaugural meeting on December 6-7, 2010; at which time it exercised a number of its key responsibilities associated with the start-up of the new Crown corporation, including recommending that the Government approve this Corporate Plan and the operating and capital budgets for 2010-2011.

The "Closing" transactions required to complete the transfer of most of the Society's assets and a substantial endowment from the foundation to the new Museum and to enter into the lease with the Port Authority are expected to be completed within eight to ten weeks of the approval of the Corporate Plan.

2. CORPORATE PROFILE

The corporate profile contains an overview of the Museum's: governing legislation; mandate; history; governance structure; Program Activity Architecture; and financial and human resources. Sections 3 and 4 identify the key strategic priorities facing the Museum and the strategies and key activities the corporation has established for the early period of its operation. Section 5 contains the operating and capital budgets. The Museum will develop a more comprehensive plan, including key performance measures, once its Board and management team have had the opportunity for further deliberations.

2.1. GOVERNING LEGISLATION

The Government introduced Bill C-34, an *Act to Amend the Museums Act*, on June 7, 2010. The legislation sets out the Museum's purpose and makes consequential amendments to several statutes with which the corporation is required to comply. It also defines the capacities and powers that the Museum may exercise in carrying out its mission. These include activities such as the care of the Museum's collection, exhibitions and other public programming, research, training and business activities. In addition, the legislation contains a special transitional provision for a Statutory Appropriation. This allowed Parliament to vote an initial appropriation of \$15 million to be available for use during the Museum's first 12 months of operations, conditional on the Government's approval of the Museum's first Corporate Plan and Operating and Capital Budgets.

Under the *Museums Act*, the Canadian Museum of Immigration at Pier 21 is a distinct legal entity, wholly-owned by the Crown. It operates at arm's length from the Government in its day-to-day operations and in its activities and programming. As a Crown corporation and a member of the Canadian Heritage Portfolio, the Museum contributes to the achievement of the Federal Government's broad policy objectives.

The Museum is also governed by the Crown corporation control and accountability regime established under Part X of the *Financial Administration Act*. This means that, among other requirements, it must develop and submit annually to the government a Corporate Plan, a Summary of the Corporate Plan (which is tabled in Parliament) and an Annual Report. Its financial statements are audited by the Office of the Auditor General (OAG) and, once every ten years, the corporation is subject to a Special Examination—an independent and objective assessment of the corporation's management systems and practices. The Museum is also required to comply with a range of provisions in other statutes, including: the *Access to Information Act*; the *Privacy Act*; the *Official Languages Act and Regulations*; the *Expenditure Restraint Act* and the *Canada Labour Code*, among others.

2.2. MANDATE

The *Museums Act* establishes the Mandate of the Canadian Museum of Immigration at Pier 21 as follows:

The purpose of the Canadian Museum of Immigration at Pier 21 is to explore the theme of immigration to Canada in order to enhance public understanding of the experiences of immigrants as they arrived in Canada, of the vital role immigration has played in the building of Canada and of the contributions of immigrants to Canada's culture, economy and way of life.

The Museum's public policy role is articulated in the preamble of the *Museums Act*, which states that, "Each [national museum]:

- a) plays an essential role, individually and together with other museums and like institutions, in preserving and promoting the heritage of Canada and all its peoples throughout Canada and abroad, and in contributing to the collective memory and sense of identity of all Canadians; and
- b) is a source of inspiration, research, learning and entertainment that belongs to all Canadians and provides, in both Official Languages, a service that is essential to Canadian culture and available to all."

2.3. VISION

While the *Museums Act* establishes the Museum's mandate—or purpose—a key priority for the Board of Trustees within the first year of its appointment will be to establish a collective, compelling Vision Statement that articulates the leadership's aspirations for the unique role that the Museum will play in fulfilling its purpose over the next 10-30 years. Such a statement will be inspired by the Museum's mandate and core values and will provide a tangible and attainable image of its destination, while preserving the necessary flexibility to respond to a changing environment. It will provide a clear sense of direction in support of which the Museum can align a coherent set of programmatic and organizational strategies.

2.4. HISTORY

With the federal government's announcement in June 2009 that it would create a new national Museum to explore the broad themes of Canadian immigration at Pier 21, a new chapter in the history of Pier 21 began. The announcement underlined the government's commitment to recognizing and celebrating the important role that immigration has played throughout Canada's history.

HISTORY OF PIER 21 PRIOR TO JUNE 2009

In 1971, more than forty years after its official opening as one of Canada's major immigration terminals, Pier 21 ceased operations. During that time, Pier 21—located on the Halifax waterfront—had welcomed hundreds of thousands of immigrants seeking adventure, employment and opportunity. They included refugees from war-torn Europe and from Hungary following the Revolution, war brides and displaced children. Pier 21 played another key role during the Second World War, providing a lifeline of supplies and personnel to Britain. Overall, approximately 1.5 million immigrants and Canadian military service personnel passed through Pier 21

between 1928 and 1971. With the decline in the number of immigrants arriving by sea in the 1960s, the immigration terminal at the Port of Halifax could no longer be justified, but its history would live on through the vision and dedication of the Pier 21 Society.

The Pier 21 Society was formed as a non-profit, charitable organization in 1988, and headed by the late J.P. Leblanc until 1993, when Ruth M. Goldbloom, O.C. became its President. Their dream was to transform the immigration shed into a world-class museum that would honour the people who passed through its doors, the importance of immigration throughout Canada's history, our country's contribution to the Second World War and the role of Pier 21 during a significant period in Canada's development as a nation. This dream became a reality when the Federal Government announced, in 1995, that the legacy of Halifax (the host city) for that year's G-7 Summit would be a pledge of \$4 million towards the museum, contingent on the Society raising an equivalent amount. By November, 1998, a highly successful national fundraising campaign had raised the required funds; the museum opened on Canada Day, 1999 in the historic building administered by the Halifax Port Authority.

With the support of the Pier 21 Foundation—established in 2002 to raise an endowment fund to support public programming—the the Society managed to create an extremely popular attraction that welcomed 46,172 visitors in 2008-2009, many of them “alumni” of Pier 21. It also had a large, engaged and loyal volunteer base (7,460 Volunteer hours in the same year). The Society developed a permanent exhibition—focussed on the Pier 21 experience— hosted several travelling exhibitions and implemented an impressive education and public program. One of its most innovative programs is the Welcome Home to Canada Program. Between 2004 and 2010, the program—which mirrors the historic role of volunteers at Pier 21 in welcoming new arrivals—helped more than 100 newcomers from 40 countries gain significant Canadian work experience and to enhance their employment opportunities.

The Society's annual operating budget of approximately \$2 million was funded through facility rentals and gift shop sales (\$600,000 per year), project grants from governments (particularly from employment programs), and private fundraising; the Society received no on-going operating funds from any level of Government aside from an exemption from municipal taxes. Between 2002 and 2010, the Pier 21 Foundation built an impressive \$7 million endowment fund in cash and pledges from private and corporate donors.

CREATING A NATIONAL MUSEUM

While one in five Canadians can trace some relationship to Pier 21, millions of immigrants have arrived through other entry points. With the Prime Minister's announcement in 2009, the Federal Government signed a Statement of Intentions with the Society, the Foundation and the Halifax Port Authority (the organization

“THE STORY OF PIER 21 IS INTERTWINED WITH THE STORY OF CANADA...CREATING A NATIONAL MUSEUM AT PIER 21 IS A FITTING MONUMENT TO CANADA'S VALUES AND THE ROLE IMMIGRANTS PLAY IN OUR COUNTRY'S HISTORY.”

Prime Minister Stephen Harper, June 25, 2009.

responsible for all of Halifax's federally-owned waterfront properties) to create a new cultural Crown corporation through amendments to the *Museums Act*. The Museum's purpose would be to explore Canadian immigration—regardless of point of entry—including both historical and more recent trends. On April 20, 2010, the four parties entered into a Definitive Agreement—a legally binding document that details their respective roles, responsibilities and obligations:

- **The Pier 21 Society** to transfer most of its financial and other assets to the new corporation and restrict its commitments to potential donors for specific donor recognition so as not to bind the new corporation; previous donors are to be honoured, however the form of donor recognition will be at the sole discretion of the new Museum;
- **The Foundation** to transfer the substantial endowment fund (cash and pledges) to the new corporation, conditional on the capital being kept intact indefinitely and the revenues being used solely for the purpose of public programming;
- **The Halifax Port Authority** to lease space to the corporation, including the existing footprint and space for an expansion; the terms of the lease—to be executed by the new corporation—form part of the Definitive Agreement; and
- **The Federal Government** to introduce legislation to amend the *Museums Act* and to provide capital and on-going operating funds to the new Museum.

The Definitive Agreement also establishes contractual obligations for the Museum, pursuant to section 24 of the *Museums Act*, including: accepting assets from the Society and the Foundation; administering the Endowment Account in a way that preserves the capital; recognizing donors (the form, manner and content to be determined by the Museum); and making offers of employment for a term of two years to permanent, full-time staff of the Pier 21 museum, with the potential for permanent positions to be offered at any time within the two years, should the new corporation choose to offer them.

CLOSING

It is estimated that within ten weeks of the Government's approval of this Corporate Plan, "Closing" will take place. At that time, the Museum will acquire most of the assets of the Society and a substantial endowment from the Foundation. It will also execute the lease with the Port Authority. During the transition period between when they receive their letters of offer and Closing, staff of the Pier 21 museum remain employees of the Society; they will be heavily involved in executing the Society's obligations under the Definitive Agreement and continuing the operations of the Society's museum. To enable it to perform its fiduciary duties and to launch a number of priority activities while it has no staff, the Board of Trustees will be supported by a small Implementation Team.

TABLE 1: SEQUENCE OF EVENTS: FROM ESTABLISHMENT OF THE CROWN CORPORATION TO CLOSING

2.5. GOVERNANCE STRUCTURE

The Museum's Board of Trustees serves as its governing body and is accountable to Parliament for the stewardship of the Museum through the Minister of Canadian Heritage. The *Museums Act* provides for an eleven-member Board of Trustees that is appointed by the Minister of Canadian Heritage with the approval of the Governor-in-Council.

The Crown corporation Governance model establishes the Board of Trustees as independent from management; its role is to provide strategic direction and oversight. The Board expects to establish a number of committees to support it in some of its key responsibilities early in its mandate.

While the Board is accountable for results and the business activities of the Museum, the legislation provides for a Director/Chief Executive Officer who has day-to-day control and supervision of the Museum's work and staff. The Board has signed a delegation instrument that delineates the signing authorities of the CEO and other Museum staff. Bill C-34 provides for the first Director of the Museum to be appointed by Governor in Council, on the recommendation of the Minister. The Minister intends to engage the Board in the recruitment process, which will be a high priority during the Museum's start-up period.

2.6. PROGRAM ACTIVITY ARCHITECTURE

The Canadian Museum of Immigration at Pier 21 has developed an initial Program Activity Architecture (PAA). While the Board may seek approval to adjust the PAA during the first few years of the Museum's operations, its programs and activities are currently being designed to achieve the following **Strategic Outcome**, derived from its legislated mandate:

STRATEGIC OUTCOME: CANADIANS ARE ENGAGED IN BUILDING AND EXPLORING THE STORIES, THEMES AND HISTORY OF CANADIAN IMMIGRATION AS IT CONTINUES TO UNFOLD.

Key themes that the Museum will explore as it explores the many centuries of immigration to Canada will be:

- The vital role immigration has played in the building of Canada;
- The experience of immigrants as they arrive in Canada; and
- The on-going contributions of immigrants to Canada's culture, economy and way of life.

PROGRAM ACTIVITIES AND DESCRIPTIONS

- **VISITOR EXPERIENCE AND CONNECTIONS**

EXPECTED OUTCOME: CANADIANS HAVE ACCESS TO—AND ARE ENGAGED IN BUILDING—MUSEUM CONTENT AND PROGRAMMING THAT REFLECTS THE DIVERSE EXPERIENCES AND CONTRIBUTIONS OF IMMIGRANTS THROUGHOUT CANADA'S HISTORY

This Program Activity aims to give the Museum's audience access to rich content and programming that reflects the diverse experiences and contributions of immigrants throughout Canada's history. It is also designed to engage Canadians extensively in building and exploring these key themes by encouraging them to share their stories and to research their own family's immigration story. The Museum conducts research and presents vibrant studies of immigration to Canada through a wide variety of layered mediums including: permanent and adaptable exhibitions; on-site and outreach programs; travelling exhibitions; publications; virtual exhibitions; and other web and social media tools. Visitor Experience and Connections includes: Research and Content Development; Interpretation and Connections (including Public Programming and Exhibits); National Outreach and Partnerships; and Visitor Services and Amenities (including volunteers' activities).

- **ACCOMMODATIONS**

EXPECTED OUTCOME: THE MUSEUM'S FACILITIES CONTRIBUTE TO A RICH, WELCOMING AND ENGAGING VISITOR EXPERIENCE, ARE SAFE AND ACCESSIBLE FOR VISITORS, STAFF AND VOLUNTEERS, AND ARE MAINTAINED IN A COST-EFFECTIVE MANNER.

The Accommodation Program Activity provides secure and functional facilities that meet all safety and building code requirements including a renovated Museum facility that furthers the vision and mandate of the Museum. It ensures that the Museum's leased facilities: support the realization of the Museum's mandate; contribute to a rich, welcoming and engaging visitor experience; and are safe, secure and accessible. Capital improvements to the facilities optimize the use of the space for public programming, are managed prudently and respect the historic nature of the site. Accommodation includes: Leasehold Improvements and Building Operations, including Security.

- **INTERNAL SERVICES**

EXPECTED OUTCOME: SOUND GOVERNANCE PRACTICES ARE IN PLACE AND RESOURCES ARE EFFECTIVELY MANAGED TO SUPPORT THE ACHIEVEMENT OF THE MUSEUM'S MANDATE.

Internal Services are groups of related activities and resources that are administered to support the needs of programs and other corporate obligations of the organization. These groups are: Management and Oversight Services; Communications Services; Legal Services; Human Resources Management Services; Financial Management Services; Information Management Services; Information Technology Services; Real Property Services; Materiel Services; Acquisition Services; and Travel and Other Administrative Services. Internal Services include only those activities and resources that apply across an organization and not to those provided specifically to a program.

2.7. FINANCIAL RESOURCES

In the fiscal framework, the Museum was given access to up to \$59.3 million in appropriations for capital and operations over five years. Subject to the Government's approval, total appropriations made available to the Museum to cover its operating costs are \$34.4 million over the next 5 years. This will be augmented by self-generated revenues, including from admissions, sponsorships, donations, retail and food activities, facility rentals and income from the endowment fund (which is restricted to programming purpose only). On the other hand, the Museum will be required to reimburse the Halifax Port Authority for Payments in Lieu of Taxes (PILT) attributable to its facilities, an amount that will not be known until the fit-up is complete. For capital, the Museum also has access to total appropriations of up to \$24.9 million for capital over the next five years.

The Board of Trustees would like to acknowledge the invaluable resources that the Department of Canadian Heritage has dedicated to bringing the Museum to the point at which it was established and a Board of Trustees could be appointed. Its intention is reimburse the department for the direct costs incurred on behalf of the corporation prior to the approval of its Corporate Plan.

2.8. HUMAN RESOURCES

At the time the Definitive Agreement was signed, the Society had 22 permanent full-time—and many part-time and seasonal—staff. In order to create a clear legal division between the Society and the new Museum, the Society will issue a notice of termination (eight weeks are required under Nova Scotia law) and the new corporation will immediately offer all permanent, full-time employees a determinate, term position—beginning the day after Closing takes place, for a period of two years—during which time permanent positions will be created and staffed. Prior to issuing the letters of offer, interim compensation and benefits arrangements that comply with the obligations set out in the Definitive Agreement will need to be defined. The two-year period was designed to provide management with time to determine the Museum’s longer-term Human Resource requirements, but does not imply that staff will remain on term contracts for the full two-year period. As the Museum develops its organizational structure, term employees will be incorporated into the new structure. The corporation will also be assessing the extent to which it may employ part-time and seasonal staff of the former museum.

Based on preliminary estimates, it is expected that the corporation could hire up to 37 additional staff over the first five years of operations, with an expected 15 to be retained (in addition to resources retained contracts and/or temporary assignments) in the first 18 months. In particular, a number of key positions will need to be filled to give the Museum the capacity to develop additional content and programming consistent with its national mandate and to meet the accountability requirements of a Crown corporation. However the Board and management of the new Museum will need time to assess their human resource requirements and design an organizational structure that reflects the Museum’s corporate culture, accountabilities and priorities. Therefore staff numbers and personnel costs reflected in this Corporate Plan and the accompanying budget **should be considered as estimates for planning purposes only**. A subsequent Corporate Plan will more fully reflect the deliberations of the Board of Trustees and management of the new Museum.

One of the greatest strengths of the museum operated by the Pier 21 Society over the last 12 years—that was reflected in the day-to-day actions of its staff and its extensive network of volunteers—was a strong, value-based corporate culture that embodied a passion for research, innovation, creativity and service to the public, and for telling the story of the approximately 1.5 million immigrants, war brides, displaced children and Canadian military troops who passed through the Pier while it was one of Canada’s primary ports of entry. These values will be an important inspiration to the Canadian Museum of Immigration at Pier 21 as it

implements its broader mandate. Indeed a key challenge will be to preserve and build on the former museum's commitment to these values as the new organization is established.

The Board of Trustees is also hopeful that it will be able to count on the large and loyal base of committed volunteers who served the Pier 21 museum so well. That museum benefitted from an incredible 7,460 volunteer hours in 2008-2009.

3. STRATEGIC ISSUES FOR THE PLANNING PERIOD

The Museum's primary objective is to achieve the mandate established for it by Parliament in the most effective way possible. This section outlines the environment in which the Museum expects to be operating and the resulting key strategic priorities during the critical start-up period. It forms the basis on which the Board and management have defined their key results, strategies and activities for the planning period. The scan covers both internal strengths and challenges; and external opportunities and risks.

3.1. ENVIRONMENTAL SCAN

INTERNAL STRENGTHS AND CHALLENGES

CREATING A NEW CROWN CORPORATION

There is a wide range of challenges involved in establishing a new Crown corporation. In the case of the Canadian Museum of Immigration at Pier 21, this challenge is even more complex in that it involves the transfer of assets from a separate not-for-profit organization. Given the terms of the Definitive Agreement, there are a number of obligations that the first Board of Trustees will be required to fulfill in the short period of time leading up to Closing. As indicated above, during this time, the Pier 21 staff will still be employed by the Society, and not by the Crown corporation. An Implementation Team has been established to assist the Board during this time. Key priorities will be to ensure the Board receives the appropriate orientation, is positioned to perform its fiduciary duties—specifically with regard to Closing—and develops the foundational tools and structures required of a Crown corporation.

During the months following its creation, the corporation will also be building the capacity to adopt best practices in corporate governance and administration to provide for sound and rigorous stewardship of its resources and value for money for the public and private funds invested in the corporation. The Museum will need to establish the appropriate human resources infrastructure to recruit and support the additional talent necessary to allow it to attain its goals. Other key activities during the start-up period will be to put in place the appropriate structure, systems, processes, policies, practices and tools—particularly in the areas of financial,

human and information management—to allow it to excel in the delivery of its mandate, achieve results effectively and efficiently, be accountable to Canadians for results, and comply with applicable legislation and Government policy.

HUMAN RESOURCES AND SOCIAL CAPITAL

One of the Museum's most significant assets will be the social capital to be transferred to it by the Pier 21 Society. This includes the museum's staff and volunteers and its reputation; the Society's museum at Pier 21 earned a strong reputation for its commitment to providing a welcoming, engaging and unforgettable experience for visitors to the museum, whether they were visiting the exhibitions, partaking in tours and special programming, or renting space for public and private functions (there were over 200 events hosted at this important national historic site per year).

The Pier 21 Society also built a reputation over 12 years as a highly value-based organization; its staff and volunteers are extremely knowledgeable and share a strong commitment to public service, to giving back to the community and to volunteerism. There is a strong sense of team and horizontality; while formal structures exist, work is organized in a cross-functional way that reflects the deeply-held belief that staff and volunteers have a significant contribution to make in determining the museum's plans and activities, regardless of level, seniority or functional unit. In the face of limited resources, the staff of the Pier 21 museum also demonstrated a keen ability to "do more with less," coming up with innovative—and frugal—ways of delivering their program, providing exceptional service to their visitors and establishing strong links with the local community. The Welcome Home to Canada Program is an outstanding example of the way in which the Society was able to establish synergy between the museum's mission, values and community outreach. Through the Society's highly successful development efforts, and those of the Foundation to build the endowment fund, the Society was also extremely successful—across the country—in generating enthusiasm and funding for the Pier 21 Society museum.

The staff complement for the Canadian Museum of Immigration at Pier 21 will initially consist of the full-time staff of the Pier 21 museum who will be offered two-year term appointments, plus seasonal and part-time employees of the Pier 21 museum who may also be hired by the new Museum and any other immediate appointments made by the Museum's management. Over the next five years, staff numbers could as much as triple; in the short-term, priorities will be to quickly develop the staff and systems capacity to meet the governance and accountability requirements of a Crown corporation and to develop the content and programming reflective of the corporation's mandate. The Museum will also have access to a much larger resource base than that of the Society's museum. A major priority will be to reflect in the new corporation the values that made the Society such an extraordinary organization and to take advantage of the opportunity offered by the fact that staff previously employed by the Pier 21 museum will form the nucleus of the corporation's staff and that Pier 21's volunteers have indicated their commitment to working with the new Museum. They will bring with them the essence of a vital corporate culture.

In the shorter-term, a significant challenge will be the fact that the Museum has virtually no staff during the period between when the letters of offer are issued and Closing. During this time, the Board of Trustees will have to perform a number of significant duties, including due diligence and execution of the new Museum's obligations under the Definitive Agreement, issuing construction contracts to retrofit the Annex and the Central Office Bay and adopting key governance instruments and financial systems and controls. A small Implementation Team has been put in place to assist the Board during this critical time period.

CONTENT

At least initially, the new Museum will be able to leverage a large and growing collection of research and documentary materials, artifacts, memorabilia and didactic objects developed by the Society—along with considerable expertise—on which it will be able to build. Effective stewardship of such materials entails ensuring appropriate policies, standards and systems are in place for their acquisition, registration, storage and preservation.

Images and first-hand accounts of immigrants, veterans and former staff and volunteers of Pier 21 breathe life into Pier 21's research holdings. The thriving and popular research center built over 2,000 stories, 600 oral histories, 1,000 donated books, 300 films and thousands of archival images and scans of information—including photographs, newspaper clippings, immigration-related documents and ship memorabilia—on immigration and the Second World War.

This material has tremendous emotional depth, tied as closely as it is with the individual stories that Canadians have shared with the Society. Additional information on the topics of migration, nautical history, waves of immigration to Canada, ethnic groups and genealogy was also produced in the Research Centre. The new corporation intends to offer similar services in the context of its national mandate.

Both the Oral History Collection—recorded with the facilitation of an oral historian—and the Image Collection are used by researchers, writers, filmmakers, school children preparing heritage projects and families searching a connection with their past. To facilitate access to these collections, the research staff offer reference services to anyone who visits, e-mails, calls or writes. They conduct oral history interviews, scan materials, collect stories, deliver educational workshops and work with countless partners on book, film and research projects.

THE EXISTING PIER 21 STORY COLLECTION IS DIVIDED INTO TEN MAJOR CATEGORIES:

- Immigrants
- British Home Children
- Veterans
- War Brides
- British Evacuee Children
- Jewish War Orphans
- Child Migrants
- Displaced People and Refugees
- Hungarian Revolution Refugees
- Pier 21 Staff and Volunteers

Developing the capacity to build collections with a broader scope will be particularly important as the Canadian Museum of Immigration at Pier 21 reaches beyond Pier 21 itself and tells the stories of all immigration to Canada. The Pier 21 museum initiated work to include the entire history of newcomers to Canada, from the first contact to the present, from which the new corporation will substantially benefit. Examples of recent work to collect stories about all immigration to Canada that will be among the raw materials used to create future exhibits that explore the broader themes of immigration to Canada include:

- Pre-Pier 21 stories written by the descendants and families of those arriving in the 18th and 19th centuries;
- Memoirs from those who arrived at any of Canada's ports and borders; and
- Post-Pier 21 stories from immigrants and refugees between 1971 and today.

CAPACITY TO CREATE UNIQUE EXPERIENCES

The Canadian Museum of Immigration at Pier 21 will also benefit from—and be able to build on—the success that the Pier 21 Society had in developing public programs and exhibits that interpret the content, engage the public and evoke emotional responses and personal connections. For many, a trip to Pier 21 is a pilgrimage to the place that welcomed them to the country. Visitors to the Society's museum receive a warm welcome and enjoy a unique experience; the exhibits and programs are moving and simply being in the space offers a strong emotional impact that goes beyond the story of Pier 21. Visitors explore stories of Canadian immigration and nation building throughout the facility through a mix of interactive exhibits, multimedia presentations and activities for all ages, including Family Fun Days, camps during the summer and March break, multicultural fairs and public lectures. Volunteers and staff also offer guided tours and workshops, in both Official Languages, tailored to suit the needs of individual groups of visitors. A programming highlight at the Society's museum is the breathtaking multimedia presentation *Oceans of Hope*, which tells the history of Pier 21 from the late 1920s, through the depression, Second World War and post-War years.

There is therefore a strong foundation on which to develop content, programming and visitor connections. The challenge for the new corporation will be to leverage the Society's legacy—and to not lose the story of Pier 21 as a key part of the overall story-line—while building a much broader content and reaching out to a wider audience. In developing its Exhibition Master Plan, the new Museum will also have access to a set of recommendations that were developed by the Pier 21 Exhibitions, Research and Education Committee (EREC), comprised of Pier 21 museum staff, Society Board members and community representatives.

WEB CONTENT

The Society also presented vast amounts of material on its website, all of which will be transferred to the new Museum. It includes rich content, original material and exhibits produced by the Society in addition to numerous links to other related websites, including Library and Archives Canada, Citizenship and Immigration Canada, the Virtual Museum of Canada and Parks Canada's

EXAMPLES OF DATABASES CURRENTLY ACCESSIBLE THROUGH THE RESEARCH CENTRE AT PIER 21:

- 1925 to 1935 Immigration Record Index (Library & Archives Canada);
- 1928 to 1971 Immigration Statistics;
- Ship Arrival Database; and
- Ship Images.

Women in History. One of the Society's primary commitments was to ensure its web presence created a compelling 'virtual visitor experience,' one that was user-centered and accessible. The Board of Trustees for the Canadian Museum of Immigration at Pier 21 is committed to ensuring that the corporation's website is equally compelling. A key priority will be to address some technical issues related to migration of the platform and to develop and implement a strategy to make content in both Official Languages. While the Museum is firmly committed to moving as quickly as possible to translate the primarily English content on the Society's website, the depth of the content will require some time to produce in French. As this work proceeds, the Museum is launching a bilingual website and has in place a transitional strategy to communicate as much information as possible in both English and French.

PARTNERSHIPS AND NATIONAL OUTREACH

It was in large part through its extensive network of partnerships that the Society was able to acquire documents, images and data bases. For example, the images in the Society's collection are compiled from sources such as the Sisters of Service, Citizenship and Immigration Canada, Canadian National Railway, the Halifax Port Authority and the Allan S. Tanner Collection (images that show Canadian service personnel returning to Pier 21 in 1945). Also included are thousands of scanned newspaper clippings, immigration-related documents, and ship memorabilia. The majority of the original and digital images in the collection have been donated by individual alumni and their families. Partnerships with government departments, universities, and private foundations have led to the development of databases of ship profiles and immigration records, research papers, articles, and conference presentations.

The new Museum will also be able to leverage the Society's great success in outreach and partnerships with other organizations to develop and present special programming to visitors—including workshops for school-age children and incoming travelling exhibits on a range of topics that have had significance to Canada's immigration story and/or celebrate our cultural heritage and diversity. Other examples of innovative partnerships and outreach include:

- The *Community Presents program*, which encourages cultural groups to create their own exhibitions and tell their own stories while celebrating themes related to immigration, cultural diversity, cultural heritage and identity. It provides an opportunity for community groups to showcase their unique traditions and culture, allowing the public to better understand Canada's collective and distinct cultural heritages; and
- The *Diversity Spotlight program*, which encourages cultural groups to screen films that tell their story and explore the themes of immigration, diversity, cultural heritage and identity.

One of the most inventive programs that the Society established is the Welcome Home to Canada Program (WHTC), developed jointly with a wide range of community and corporate partners, including the Atlantic Canada Opportunities Agency, the Centre for Entrepreneurship, Education and Development, the Greater Halifax Partnership, the Nova Scotia Office of Immigration, the Immigration Settlement & Immigration Services and the TD Bank Financial Group among others. The WHTC is an example of the innovative ways in which the Society worked with the local community to develop opportunities for mutual benefit, fully consistent with and supportive of the site's history and mandate. It reflects the historic role of Pier 21 in welcoming immigrants to their newly-adopted home and symbolizes the theme to which the Canadian Museum of Immigration at Pier 21 is dedicated. Between 2004 and 2010, the program helped more than 100 newcomers, from 40 countries, gain significant Canadian work experience and enhance their employment opportunities. The Pier 21 Society provided a 6-month work term at Pier 21, external work placement opportunities, mentorship and professional development and network building. Over 70% of all WHTC participants in this period obtained meaningful employment or were able to further their education after completing the program. The Board of Trustees is firmly committed to the values represented by this program.

The new Museum will need to nurture and leverage these relationships while at the same time building a broader base of connections to enable it to fulfil its national mandate. A key opportunity will be to establish partnerships with non-traditional venues and remote parts of the country; a vast range of the materials that will make up the Museum's exhibits and programs will not have the same rigid environmental requirements as those of many of the other national museums.

FACILITIES

In view of its symbolic importance, the space within the National Historic Site to be occupied by the Canadian Museum of Immigration at Pier 21 is a tremendous asset. The Society was very prudent during the time it leased space in Shed 21 and the Central Office Bay, expanding the museum footprint only as resources became available. The existing footprint is made up of 12 discrete, often disconnected, spaces totalling 50,263 square feet spread over two floors in Shed 21, with minimal programming on the first floor. This is primarily due to the fact that close to 5,500 square feet on the main level is used by the Port Authority to provide access to washroom facilities for cruise ship passengers. This arrangement posed obvious challenges in terms of security, and is not acceptable to a national museum; the current configuration also produces a physical disconnect between the Harbour front Gallery and the rest of the museum. At the time of "Closing," the new Museum will enter into a lease with the Halifax Port Authority to lease not only the space occupied by the Society, but also the "gap" on the first floor of the Shed (see illustration 1).

While some adjustments are required to provide full accessibility, most of the existing footprint is accessible by wheelchair, wheelchairs are available, listening stations are available in the *Oceans of Hope* movie theatre for persons in wheelchairs, subtitles are provided for the multimedia presentation; guide dogs are also welcome. Nonetheless, certain modifications will be required to

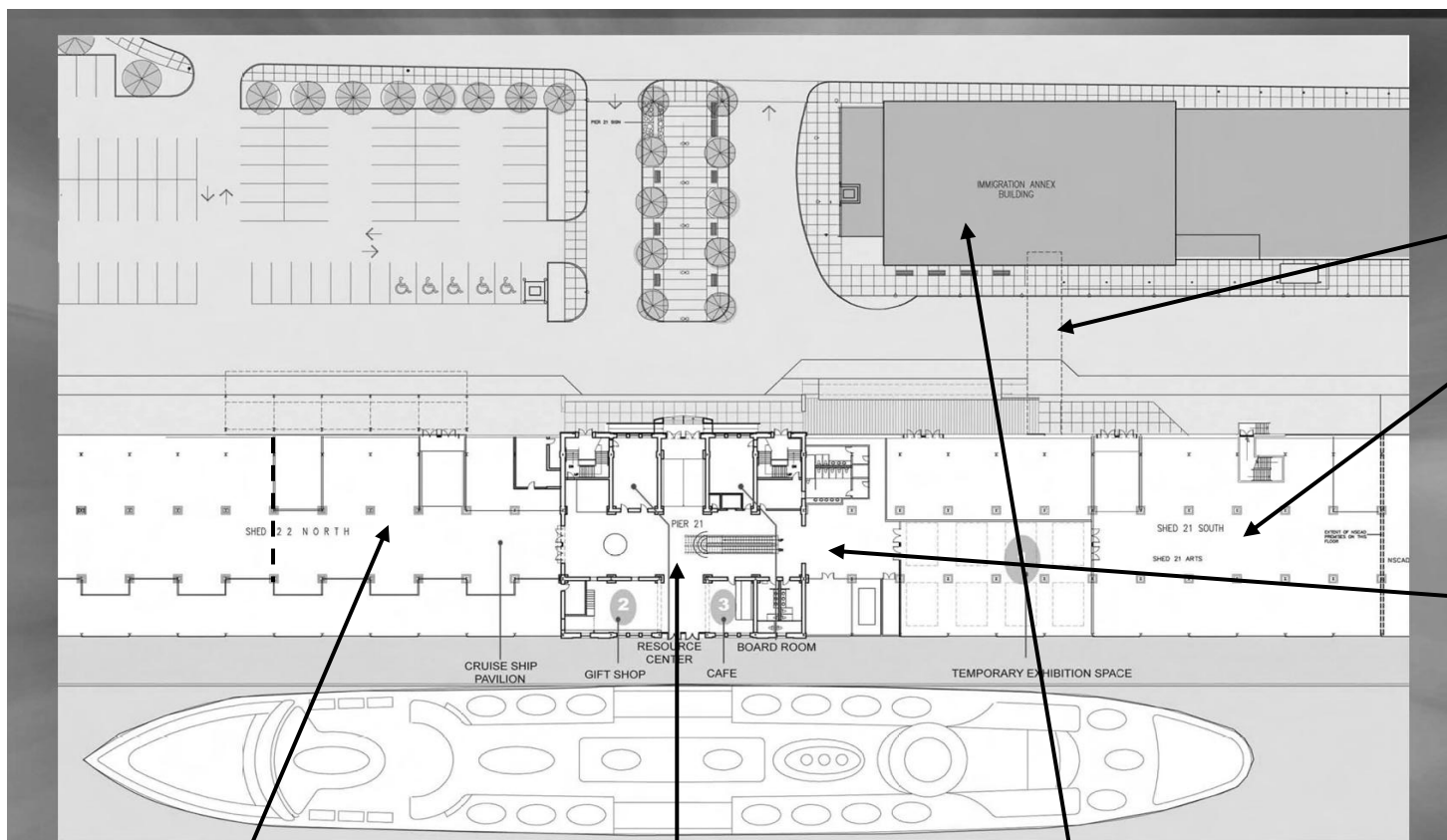
adapt this space for the new Museum's purposes and to meet accessibility and health and safety requirements. The terms of the lease also dictate that the Museum must replace a portion of the exterior cladding and several windows on the exterior of Shed 21, after which they will become the landlord's responsibility.

The forty year lease negotiated on behalf of the Museum pursuant to section 24 of the *Museums Act* includes approximately 17,000 square feet in the Immigration Annex that will become available for fit-up, as well as approximately 18,000 square feet in Shed 22 that will be available when the Halifax Port Authority has undertaken a retrofit of the building. The Immigration Annex is primarily suited for office space and research and collections functions. The space in Shed 22 could be connected to programming space in the existing footprint and would be suitable for exhibitions or other public programming activities. These spaces, together with the additional 5000 square feet in the existing footprint, will bring the total space available to the Museum to roughly 90,000 square feet.

Under the terms of the lease, the Port Authority will be responsible for capital maintenance of the building envelope, and the new Museum will be responsible for the cost of fitting-up the interior spaces. There are some transitional issues, where the Museum will be responsible for one-time repairs/replacements but the longer-term responsibility will then devolve to the landlord. The Board will be fully accountable for overseeing all aspects of the capital improvements and expansion projects, establishing contractual arrangements for design and construction, establishing the time-frames for construction and managing risks throughout. Plans for capital projects affecting the building must be approved by the Halifax Port Authority. The Museum will also be responsible for building operations and maintenance (including a proportional share of common area maintenance costs at the Port site), security and for reimbursing the Halifax Port Authority for Payments in Lieu of Taxes (PILT) incurred in relation to the space occupied by the Museum. It will need to ensure it has in place the appropriate mechanisms to provide for effective, efficient operations and maintenance and the facility's ongoing security, accessibility and sustainability.

The first priority for the new Museum's Board and management will be to develop detailed cost estimates for the fit-up of a portion of the Immigration Annex space (primarily on the second floor), make the necessary contractual arrangements and make it available to house additional staff, ideally within the current fiscal year. This will be particularly important as the Museum will need to fill significant gaps in essential positions (notably finance and governance) within the early months of its operations so it can fulfil its core accountability requirements and its broader mandate. Once this has been accomplished, the Museum's leadership will then need to turn its attention to how best to use the remaining space on the first floor of the Annex, and then to the development of the additional space for public programming when Shed 22 is delivered by the Halifax Port Authority.

ILLUSTRATION 1: SITE PLAN: EXISTING AND EXPANSION SPACE (SECOND FLOOR VIEW)
(BOLDED TEXT BOXES ACROSS BOTTOM OF ILLUSTRATION INDICATE EXPANSION SPACE)



Pedway (joins 2nd floor of Immigration Annex to Pier 21).

Shed 21 (2 floors of exhibition space).

Upper Hallway, (2nd floor, Shed 21 plus small 3rd floor mezzanine containing offices).

Shed 22 (2nd floor) Definitive Agreement provides for possible expansion, subject to HPA's retrofit of the space at the agreed costs.

Central Office Bay (1st floor, Shed 21). The Society's lease includes space around the perimeter; the lease with new Museum will cover the entire area: a key priority for fit-up during the early period.

Immigration Annex (2 floors) Another key priority is to fit-up the 2nd floor for office space. 1st floor renovations will await the Space Study.

The Museum is not a stand-alone facility; it is part of an active port with a wide range of activities. While this offers the tremendous benefit of access to a large number of cruise passengers and other visitors to the area, there will be challenges inherent in managing a visitor and event-oriented facility in a large complex administered by a landlord with a broader set of priorities. The Halifax Port Authority has made it clear that it has to have other tenants before undertaking the retrofit of Shed 22. In the current market, there is a risk of delay in the project that would mean the space is not delivered by March 31, 2013, the cut-off date specified in the lease. This would bring additional challenges to the development and implementation of the Master Interpretation Plan. The Museum will also be required to reimburse the Halifax Port Authority for Payments in Lieu of Taxes (PILT) attributable to the facilities it occupies. The ultimate cost of these payments will not be known until all fit-up is complete, adding a challenge to the development of the Museum's longer-term operating budget.

EXTERNAL OPPORTUNITIES AND RISKS

MANAGING EXPECTATIONS

The Society's museum claimed a connection to one in five Canadians. In 2008-2009, although the largest proportion of the over 46,000 visitors to the museum originated from Ontario (30.8%) and Nova Scotia (10.5%), 16.5 % of museum visitors were from Alberta and British Columbia. It is expected that a national museum, with a broader mandate, a larger space, more comprehensive exhibitions, an enhanced travelling exhibit program and a significant on-line presence will draw a significantly increased number of visitors, including those from other parts of the country.

One of the key challenges that the new corporation will face will be to manage public expectations. While the public may expect the programming to immediately reflect the full story of Canadian immigration, it will take time for the Board and staff to develop a master interpretation plan and to align resources with the new mandate. Communication plans will need to be developed to convey the message that the new Museum is up and running, but that it will be a "work in progress."

AUDIENCE DEVELOPMENT

The Government of Canada has identified tourism as a priority industry sector for economic stimulus. The Federal Tourism Strategy calls for tourism product development and improved marketing and promotion of Canada's tourism offering. The province of Nova Scotia also places a high priority on tourism. Statistics reported as of June 2010 show that visits to Nova Scotia were up 6% between January and April compared with the same time last year, particularly from elsewhere in Atlantic Canada and Ontario.

Halifax is a major economic centre for the East Coast, with an international airport and a projected population of 450,000 by 2020. The Halifax Port Authority administers the Halifax Seaport, which is home to Cruise operations at the Port of Halifax. More than 227,000 cruise ship passengers disembarked at the Halifax Seaport in 2009. In peak tourist season, this can mean as many as 10,000 passengers per day. Over the past 5 years, significant private and public funds have been invested in its infrastructure, as the Port Authority began implementing a major redevelopment project between Piers 19 and 23. It has become a significant destination for local residents, tourists and cruise passengers. In addition to the Pier 21 museum, the Halifax Seaport consists of dedicated Cruise Pavilions, public spaces, cafes, office and retail space. The Halifax Seaport annually hosts in excess of 550,000 visitors, including cruise passengers and crew; patrons for events such as the Seaport Beer Fest, Word on the Street; and a number of other events at the Cunard Centre. The Port Authority's redevelopment plan is expected to continue to expand the number of visitors to the Port. This provides a significant opportunity for the Canadian Museum of Immigration at Pier 21 to tap into an expanding local and tourist market. The challenge will be to tap into the potential local market, while also ensuring access for all Canadians to the Museum's public programming through outreach, travelling exhibitions, the website and other virtual tools. Developing a compelling and unique brand and marketing strategy will need to be key priorities.

Three other key Canadian markets have been identified as holding potential for increased engagement:

- The Greater Toronto Area (GTA): the majority of fundraising dollars to date have been generated from corporations and individuals based in the GTA;
- Winnipeg: the Society's museum demonstrated strong performance in the Western Canada market, particularly in Manitoba; and
- The Greater Vancouver Area (GVA): These areas have deep connections to immigration and together represent an opportunity for the tourism, content and donor aspects of the new national Museum.

It is recognized among museum professionals that the key to repeat attendance, successful fundraising, and building audience loyalty is a holistic approach to the museum experience—from the moment a person thinks of visiting to the moment they leave the site. This holistic approach requires an integrated set of strategies covering a wide range of aspects, including marketing, services, amenities, rentals, community engagement, fundraising and sponsorship development. The Canadian Museum of Immigration at Pier 21 will be leveraging the Society's past achievements in this area while exploring additional means of creating unique and engaging experiences.

REVENUE GENERATION

Focusing on the visitor experience will also help the Museum to meet the Government's expectations that its national museums build the capacity to generate revenues. These objectives will be pursued with vigour by the Museum, building on the previous

success of the Society and the Foundation. The Board of Trustees is firmly committed to augmenting its resource base beyond its government appropriations. The Society's development efforts have been extremely fruitful, and the Pier 21 Foundation had tremendous success in raising a \$7 million endowment fund in 8 years; the new Museum will be in a good position to leverage the support and enthusiasm the Foundation generated across the country. A key priority for the Museum will be to determine the most effective strategy and mechanism(s) to support it in its fund-raising efforts.

The Museum also hopes to capitalize on new opportunities to generate revenues. As a private organization, the Society had significant success attracting donors. However, fundraising for federal corporations tends to be a bigger challenge, as potential donors question whether their contributions will have the same level of impact. It will also be important to manage relationships with previous donors, many of whom were given naming rights. The Museum will need to develop a progressive approach to donor recognition while retaining good-will with previous donors.

3.2. STRATEGIC PRIORITIES

In light of the environmental scan, the Museum has established one primary strategic priority—with a number of sub-priorities—that is at the core of the plans it is developing for the start-up period. It implies careful attention to developing a change-management strategy that respects both the legacy established by the Society and the mandate established by Parliament:

To manage the establishment of a federal cultural Crown corporation in a way that leverages the extraordinary social capital and other assets developed by the Pier 21 Society

The following key “sub priorities” underlying this primary strategic priority form the basis of the key results and activities for which further detail is provided in the following section (Section 4). The Museum will develop a performance measurement framework that will be reflected in future Corporate Plans.

PROGRAM ACTIVITY 1: VISITOR EXPERIENCE AND CONNECTIONS:

- **Developing museum content** that explores Canadian immigration regardless of point of entry—and the contribution of all immigrants to Canada's nation-building, while leveraging the human and social capital and other assets developed by the Society;
- **Developing innovative, compelling, thought provoking and inspiring exhibitions and programming** that reflect the diversity of the immigrant experience within Canada;
- **Leveraging technology** to provide visitors, both on-site and virtual, unique and innovative content and experiences in both Official Languages;

- **Offering experiences and services that create personal and emotional connections** with Canadians across the country, regardless of origin; and
- **Building on the Society's network of national and community partnerships** to develop content and programming and to develop strong, loyal audiences and generate revenues.

PROGRAM ACTIVITY 2: ACCOMMODATIONS:

- **Renovating and expanding the facility** to provide suitable and accessible space for visitors, staff and volunteers and programming, while respecting the facility's status as a National Historic Site.

PROGRAM ACTIVITY 3: INTERNAL SERVICES:

- **Effectively launching the new corporation** and fulfilling the contractual obligations of the Definitive Agreement;
- **Establishing a sound governance framework** in compliance with the regime governing federal Crown corporations; and
- **Aligning the organization and its resources** to enable it to achieve its new mandate and to adopt sound and efficient governance and stewardship practices, anchored in strong corporate values.

4. KEY RESULTS AND ACTIVITIES

While the primary focus of the following section is on the 16-18 month period ending March 2012, the Implementation Team has also developed preliminary plans for the full five years of the planning period, for the purpose of estimating budget requirements. However, the Museum will have no employees in place until early 2011. Management and the Board will require further time to determine with greater certainty their priorities and plans for the longer-term. It will also take time to develop meaningful performance measures and strategies both to monitor and report on results, and to adjust course if required.

Once the permanent staff of the Pier 21 Society have been appointed to term positions by the Museum, and once the Board and management team have had time for the appropriate level of reflection and deliberation, the Museum will develop a more comprehensive plan for the 2011-2012 to 2015-2016 planning period. The next Corporate Plan will reflect more detailed strategic and operational plans; a preliminary performance measurement strategy will also be contained in the next Plan submitted to the government.

4.1. PROGRAM ACTIVITY 1: VISITOR EXPERIENCE AND CONNECTIONS

Expected Outcome: Canadians have access to—and are engaged in building—museum content and programming that reflects the diverse experiences and contributions of immigrants throughout Canada’s history

<i>KEY RESULTS</i>	<i>KEY ACTIVITIES TO MARCH 2012</i>	<i>KEY OBJECTIVES TO 2016¹</i>
<p>RESEARCH AND CONTENT DEVELOPMENT: Museum content explores the theme of Canadian immigration regardless of point of entry—and the contribution of all immigrants to Canada’s nation-building, while leveraging the intellectual assets developed by the Society.</p>	<ul style="list-style-type: none"> ➤ Begin developing and implementing a strategy to build a rich collection of materials covering Canadian immigration broadly, including recorded stories, books, archival and reference materials, journals, subscriptions, access to data bases, etc., and to make them readily accessible to the public; and ➤ Adopt policies and systems to provide for the effective stewardship of these materials. 	<ul style="list-style-type: none"> ➤ By the end of the planning period, the collection will be documented, indexed and available to the public on site and on line while respecting Access to Information and privacy policies. There will be a comprehensive plan to continue to gather oral histories from all Canadians who wish to contribute, in conjunction with traveling exhibit and other community outreach efforts.

¹ These are based on preliminary plans developed by the Transition Team for the purpose of estimating budget requirements. They will be further elaborated prior to the submission of the next Corporate Plan.

PROGRAM ACTIVITY 1 (CONTINUED)

KEY RESULTS	KEY ACTIVITIES TO MARCH 2012	KEY OBJECTIVES TO 2016
<p>INTERPRETATION AND CONNECTIONS: Exhibitions and programming are innovative, compelling, thought-provoking and reflect the diversity of the immigrant experience within Canada; and Visitors, both on-site and virtual, have access to unique and innovative content and experiences in both Official Languages.</p>	<ul style="list-style-type: none"> ➤ Begin developing and implementing a Master Exhibition Plan, with an initial focus on Shed 21 and the Central Office Bay. This work will take into account the recommendations developed by the Pier 21 Exhibition, Research and Education Committee (EREC);² ➤ Establish a transitional website that is fully bilingual and user-centered; migrate material from the Society's website as soon as it complies with the <i>Official Languages Act</i>; ➤ Develop a strategy to rapidly make available broader content on Canadian immigration throughout its history; and ➤ Explore options for using innovative technologies, both within the Museum and through virtual means, including social media where appropriate. 	<ul style="list-style-type: none"> ➤ By the end of the planning period, a traveling exhibit will be touring the country and a series of smaller exhibits will also be touring non-traditional venues (community centres, schools, airports, train stations, etc.); ➤ The online space will be fully functioning, bilingual and content-rich and will provide an experience that embraces and allows for interaction with all Canadians; and ➤ A social media and new technology strategy will be in place to engage audiences on-site and across the country, in partnership with other institutions and community groups.

² The EREC proposes a thematic, rather than a chronologic approach, and suggests a wide range of media through which themes could be explored.

PROGRAM ACTIVITY 1 (CONTINUED)

KEY RESULTS	KEY ACTIVITIES TO MARCH 2012	KEY OBJECTIVES TO 2016
<p>VISITOR SERVICES AND AMENITIES: The visitor experience makes possible personal and emotional connections and builds audience loyalty and repeat attendance.</p>	<ul style="list-style-type: none"> ➤ Adopt appropriate planning processes to ensure a seamless integration between exhibition development and plans for programs, services and amenities. 	<ul style="list-style-type: none"> ➤ The visitor experience will be heightened by a robust family history centre, an active oral history and research group and the new technologies required to interact with visitors before, during and after their visit.
<p>NATIONAL OUTREACH AND PARTNERSHIPS: The Museum reaches and establishes connections with Canadians in all parts of the country, regardless of origin; and</p> <p>The Museum leverages—and goes beyond—the Society’s network of national and community partnerships to generate content, programming, audiences and revenues.</p>	<ul style="list-style-type: none"> ➤ Begin developing and implementing a strategy to nurture and strengthen relationships, engage key stakeholders and establish partnerships throughout the country both for the purpose of content and program development and to explore opportunities to reach Canadians in their own communities. 	<ul style="list-style-type: none"> ➤ There will be a network of partners from coast to coast who assist in the development of emerging immigration themes, identify key stakeholders in their communities and leverage the unique experience offered by the Museum; and ➤ The traveling exhibits will be an important tangible part of a two way dialogue with these partners and the communities they serve.

4.2. PROGRAM ACTIVITY 2: ACCOMMODATIONS

Expected Outcome: The Museum's facilities contribute to a rich, welcoming and engaging visitor experience, are safe and accessible for visitors, staff and volunteers, and are maintained in a cost-effective manner

<i>KEY RESULTS</i>	<i>KEY ACTIVITIES TO MARCH 2012</i>	<i>KEY OBJECTIVES TO 2016</i>
<p>LEASEHOLD IMPROVEMENTS:</p> <p>The Museum's facilities are upgraded and/or expanded as appropriate to provide suitable and accessible space for visitors, staff, volunteers and exhibits/programming; and</p> <p>Construction projects are governed by an effective project management regime, including robust risk management strategies and respect the heritage aspects of the site.</p>	<p>Key capital projects in the start-up period include: upgrading the space within Shed 21 and the Central Office Bay to meet health, safety and accessibility requirements and to provide the appropriate environmental controls for archival and other materials; replacing windows and exterior cladding on Shed 21; and retro-fitting the second floor of the annex to provide suitable space for staff and volunteers.</p> <ul style="list-style-type: none"> ➤ Develop mechanism to ensure appropriate Board oversight of capital projects; ➤ Finalize design, budget and risk management strategies for expansion into the Immigration Annex and to upgrade Shed 21 and the Central Office Bay; ➤ Initiate contracting process(es); ➤ Manage contract(s) in a sound, transparent and accountable manner, on time and within budget, employing effective project and risk-management practices throughout; ➤ Undertake space study to explore options for additional exhibition space; and ➤ Prior to additional exhibition space coming available, develop a strategy for using the available space that strikes the right balance between enhancing public programming and retaining open spaces for events. 	<ul style="list-style-type: none"> ➤ By the end of the planning period, the Museum hopes to have completed the planned upgrade and expansion projects, on-time and on budget. The primary focus during the last three years of the planning period will be to refit existing exhibition spaces (Rowe Hall and Bratty Hall) and renovating and refitting Shed 22 for exhibition space.

PROGRAM ACTIVITY 2 (CONTINUED)

KEY RESULTS	KEY ACTIVITIES TO MARCH 2012	KEY OBJECTIVES TO 2016
<p>BUILDING OPERATIONS AND SECURITY: The Museum's facilities are safe and are maintained in a cost-effective manner.</p>	<ul style="list-style-type: none"> ➤ Develop and implement the appropriate strategies and plans to provide appropriate security for staff, volunteers, visitors and museum materials and to manage building operations in an efficient and effective manner. 	<ul style="list-style-type: none"> ➤ By 2016, the entire space will be available to the public, and it will be accessible, welcoming, safe and stimulating for all visitors. People will be immersed in either of the Official Languages and many other languages will continue to be offered as well. More advances will be made to make all exhibits easily interpreted by the visually and hearing impaired as well as those with mobility challenges.

4.3. PROGRAM ACTIVITY 3: INTERNAL SERVICES

Expected Outcome: Sound governance practices are in place and resources are effectively managed to support the achievement of the Museum's mandate

KEY RESULTS	KEY ACTIVITIES TO MARCH 2012	KEY OBJECTIVES TO 2016
<p>SUCCESSFUL LAUNCH OF NEW CORPORATION:</p> <p>The corporation is effectively launched and the Museum's contractual obligations as defined in the Definitive Agreement are fulfilled.</p>	<ul style="list-style-type: none"> ➤ Retain legal counsel and undertake the due diligence required to launch the Museum and execute the Closing transactions with the Society and the Port Authority in the best interests of the corporation; and ➤ Establish the corporate infrastructure necessary to support the effective operation of the new corporation. 	<ul style="list-style-type: none"> ➤ The launch activities will have been completed by March 2012.
<p>GOVERNANCE: The corporation meets or exceeds recognized standards for Corporate Governance and has in place the instruments that are conducive to sound management and accountability including:</p> <ul style="list-style-type: none"> ○ Clarity of objectives and expectations; ○ Clear lines of accountability; ○ Transparency in the application of and compliance with rules; and ○ A culture based on a solid foundation of ethics and values. 	<ul style="list-style-type: none"> ➤ Develop instruments to articulate the respective roles of the Board and Management (By-laws, Governance Policy, delegation instruments, etc); ➤ Establish Board Committee structure; ➤ Develop a budget process that enables on-going alignment of resources with overall priorities; ➤ Work towards articulating a Statement of Vision and Values and adopting practices to reflect the values in day-to-day actions and decision-making; ➤ Develop more detailed five-year Corporate Plan, including performance measures; ➤ Develop and adopt mechanisms for ongoing performance monitoring, reporting and improvement; and ➤ Establish schedule for the development and cyclical review of corporate policies; priorities in the first year will be a Code of Ethics and policies governing: investment; contracting; human resources; donor recognition; and travel and hospitality. 	<ul style="list-style-type: none"> ➤ The Museum will meet or exceed recognized standards for Corporate Governance, including a robust performance management regime and integrated risk management.

PROGRAM ACTIVITY 3 (CONTINUED)

KEY RESULTS	KEY ACTIVITIES TO MARCH 2012	KEY OBJECTIVES TO 2016
<p>SOUND MANAGEMENT OF RESOURCES:</p> <p>The organization and its resources are aligned in a way that enables the Museum to achieve its mandate and to adopt sound and efficient governance and stewardship practices, while building a strong corporate culture;</p> <p>The corporation has in place the policies, procedures and systems that are conducive to sound and management and accountability;</p> <p>The corporation attracts and recruits the talent and expertise necessary both for the transition and the longer-term; and</p> <p>The corporation has a workplace that is fair, enabling, healthy and safe and a workforce that is productive, principled, sustainable, adaptive and representative of the diversity inherent in Canadian society.</p> <p>Note: It is anticipated that the Government will appoint the first CEO for the Museum early in the Board's mandate.</p>	<ul style="list-style-type: none"> ➤ Establish interim compensation and benefits plan and issue letters of offer to permanent full-time staff of the Pier 21 Society; ➤ Support the federal government in recruitment of the first Director/CEO; ➤ Develop and begin implementing an organizational structure, and long-term compensation and recruitment strategies; ➤ Recruit staff as required; in the first year, the Museum expects to hire approximately 15 FTEs, through a combination of means including permanent staffing and contracts; ➤ Develop approach to engaging volunteers; ➤ Begin developing and implementing a framework for human resource management that leads to policies and practices that foster a fair, enabling, healthy and safe workplace and a workforce that is productive, principled, sustainable, adaptive and representative of the diversity inherent in Canadian society; and ➤ Begin establishing appropriate operational policies, systems, structures and procedures to support sound management. 	<ul style="list-style-type: none"> ➤ The corporation will be a model for progressive, innovative and sound management practices. It will have empowered, entrepreneurial and dynamic employees who are respectful of the Museum's mission and mandate. They will be respectful of responsibilities of working in Federal Crown corporation and serving the Canadian people. They will take every opportunity to celebrate the Canadian mosaic and the role immigration continues to play in the development of Canada.

PROGRAM ACTIVITY 3 (CONTINUED)

KEY RESULTS	KEY ACTIVITIES TO MARCH 2012	KEY OBJECTIVES TO 2016
<p>DEVELOPMENT AND PUBLIC RELATIONS:</p> <p>The Museum garners a high level of awareness and public support through strong and effective marketing and communications strategies; and</p> <p>The corporation establishes the capacity to generate ongoing private-sector funds, both through commercial activities and fundraising/sponsorships.</p>	<ul style="list-style-type: none"> ➤ Develop a pro-active communications strategy for the early years of the Museum's evolution; ➤ Begin developing a corporate brand/image strategy; ➤ Nurture relations with donors to the Society's museum while establishing policies for recognition appropriate to a national institution; ➤ Develop a framework for revenue-generation, including an appropriate mechanism for fundraising. 	<ul style="list-style-type: none"> ➤ A comprehensive communications plan will be in place; ➤ A major gifts program will have proceeded in tandem with the expansion project to maximize revenues and to increase the endowment. This work will continue after the expansion through ongoing, robust major gifts and planned giving programs.

5. FINANCIAL STATEMENTS

The financial statements on the following pages reflect the appropriations the Museum expects to receive in 2010-2011 and forecasts for the remaining four years of the Plan. They also reflect the revenues that the Museum hopes to generate through commercial and fundraising activities.

Like the other five national museums, it is expected that the Canadian Museum of Immigration at Pier 21 will be classified as a "government not-for-profit organization." The Museum intends to work with the other national museums to determine how best to make the transition to the new standards issued by the Public Sector Accounting Board. However, as the new Corporation is expected to be established prior to the end of 2010, its financial statements for 2010-2011 will be prepared using Generally Accepted Accounting Practices (GAAP).

5.1. CAPITAL BUDGET

The Museum will have access to total appropriations of up to \$24.9 million for capital over the next four years to consolidate and expand the new Museum into the two-floor Immigration Annex and the second floor of Shed 22. Table 4 summarizes the projected annual capital budgets, subject to more detailed cost estimates and the Government's approval. The total of \$24.448 million reflects the fact that \$452,000 of the \$24.9 million has been allocated to operations. It also assumes the anticipated delivery date of Shed 22:

TABLE 4: ANNUAL CAPITAL BUDGET (\$MILLIONS)*

2010-2011	2011-2012	2012-2013	2013-2014	2014-2015	TOTAL
1.723	7.525	2.250	10.750	2.200	24.448

*Funded through Parliamentary Appropriations

The expansion of the Canadian Museum of Immigration at Pier 21 will be done progressively. The moment the lease is signed, the Museum will acquire more than 20,000 additional square feet. This will consolidate the currently disconnected spaces to create a full building footprint with a secure perimeter and add the two-floor Annex building, joined to Shed 21 by a pedway. By March 31, 2013, an additional 18,000 square feet on the second floor of Shed 22 is expected to become available. The lease agreement binds the HPA and the new Museum to terms for the lease of this space, provided that it is delivered by March 31, 2013. If the HPA is unable to deliver the space by that date, the new Museum will be released from its obligation. All expansion spaces will be delivered by the Halifax Port Authority as empty shells. The new Museum will be responsible for the cost of all necessary interior renovations (e.g. walls) and fit up (e.g. specialized system requirements, interior finishings).

In the short term, the Board of Trustees has elected to proceed with some of the most pressing priorities in the consolidated space and the Immigration Annex. In fiscal year 2010-11, projects are planned to:

- Resolve a number of health, safety and accessibility issues in the consolidated space of the Shed 21 building (e.g. refit of washrooms, doors and signage);
- Begin the renovation and fit up of the second floor of the Immigration Annex to provide much needed office space. The second floor of the Annex has not been renovated for decades and must be upgraded in order to meet accessibility and health and safety standards. All interior walls have to be removed in order to properly wire and insulate the space and an HVAC system has to be installed;
- Conduct a needs analysis to determine the design and final fit up of the remaining expansion space. The analysis will also consider whether more effective use could be made of the consolidated space;
- Conduct an HVAC study to determine future requirements; and,
- Prepare signage, print and web translation to meet federal identity and official language requirements.

The total cost of the work required to renovate and fit up the second floor of the Immigration Annex for office space is estimated at \$2,500,000. The Department of Canadian Heritage engaged the services of a private contracting firm in advance of the creation of the corporation, to provide the Board with the information and tools required to move forward quickly with demolition and basic renovation (floors, HVAC, perimeter walls, wiring, insulation and ceilings) that will be required as a first step in the renovation of the second floor of the Immigration Annex. The Board of Trustees plans to move forward immediately (in fiscal 2010-11) with a tender for this work (estimated cost \$1,500,000). The remaining work will be carried out in 2011-12.

Other capital priorities during 2010-11 include:

- Signage, print and web translation to meet federal identity and official language requirements;
- Refitting washrooms, doors and signage to meet health and safety requirements;
- A study of HVAC requirements; and
- A space usage study.

The Board and management will require additional time to consider how best to use the remaining expansion space (Shed 22 and the first floor of the Annex). This work will be facilitated by the space usage study, which will identify the optimal design and final fit-up of the remaining expansion space. It will also consider whether more effective use could be made of the existing space. Precise estimates for the fit-up costs will be developed by the new Museum within the approved budget and submitted for approval at a later date as part of the corporate planning process.

The following parameters are reflected in the capital budget:

- Base renovation costs for Shed 22 are calculated at \$180 per square foot.
- Exhibit design and fit up costs for Shed 22 are calculated at \$350 per square foot and are based on museum sector averages.
- Renovation costs for the Annex are calculated at \$225 per square foot, based on requirement for specialized collections storage areas, possible asbestos remediation, HVAC installation and possible construction of a front entrance.
- Building renovation projections factor in an estimated 20% to provide a prudent “envelope” that reflects both inflation over the next two to three years and development of Class “B” estimates.

5.2. OPERATING BUDGET

Total appropriations made available to the Museum in the fiscal framework to cover its operating costs are \$34.4 million over the next 5 years. This will be augmented by self-generated revenues, including from admissions, sponsorships, donations, retail and food activities, facility rentals and income from the endowment fund (which is restricted to programming purpose only). The total appropriations shown in Table 5 reflect the transfer of \$452,000 from capital to operating and a decrease in the first fiscal year, attributable to the fact that the Museum will only be incurring operating costs for a partial year.

TABLE 5: ANNUAL OPERATING BUDGET (\$MILLIONS)

	2010-2011	2011-2012	2012-2013	2013-2014	2014-2015	TOTAL
Appropriations	2.853	6.300	7.700	7.700	7.700	32.253
Revenues	0.311	1.515	1.590	1.570	2.180	7.166
TOTAL	3.164	7.815	9.290	9.270	9.880	39.419

A key factor that will affect the Museum’s operating budget is the fact that it will be required to reimburse the Halifax Port Authority for Payments in Lieu of Taxes (PILT) attributable to its facilities. It is difficult to accurately forecast PILT costs in advance of the renovation and fit up of the expansion space but, for the purposes of the operating budget, PILT has been estimated at \$300,000 annually. PILT will be paid by the Halifax Port Authority but charged back to the new museum. Pier 21 Society was assessed \$44,712.38 in municipal taxes by the Halifax Regional Municipality in 2008.

Personnel costs for the Canadian Museum of Immigration at Pier 21 have been calculated on projected human resource requirements for the purposes of the inaugural Corporate Plan and an initial operating budget. The Board and management of the new Museum will require time to assess its human resource requirements and to design an organizational structure that reflects the

corporate culture, accountabilities and priorities of the corporation. **All personnel costs reflected in this Corporate Plan should therefore be considered an estimate for planning purposes.** A subsequent Corporate Plan will more fully reflect the deliberations of the Board of Trustees and management of the new Museum.

The Definitive Agreement commits the new Museum to ensure that the 22 permanent full-time employees of the Pier 21 Society are provided with net pay that is not lower than that received under the employ of the Society. Initial salary levels have been calculated to reflect this contractual requirement. It is estimated that full-time staff will increase by 15 people to 37 in 2011-12 as the corporation hires a Chief Executive Officer and additional staff required to expand the programming of the museum and meet federal accountability requirements.

The Society's Pier 21 Museum also relied on a complement of 15-29 temporary, part-time or seasonal employees to operate its museum. Many of these positions were funded either completely, or in part, by government employment programs. As a federal Crown corporation, the new Museum will not have access to most of these programs and will have to absorb the salary and benefits for those employees it wishes to retain. The Museum also hopes to benefit from approximately 60 volunteers who donate their time on a daily basis.

As a Schedule III Crown corporation, the Canadian Museum of Immigration at Pier 21 will be subject to the *Public Service Superannuation Act (PSSA)*; its employees will contribute to the federal pension plan and will be eligible to participate in the Public Service group benefit plan. The process to access the federal group benefit plan is lengthy and could take more than one year. An interim benefit plan has been developed to ensure that employees of the new corporation will have access to comparable benefits in the interim.

The new Museum will rely heavily on the purchase of professional services during its first two years of operation in order to fulfill core accountability requirements, meet its Closing obligations and provide independent support to the Board. The corporation will also acquire interim legal and realty advice. Once the corporation has determined its long-term organizational requirements and structure, many of these activities will be performed by museum staff. While up to sixty staff could ultimately be required to meet the new Museum's federal accountability requirements and expanded mandate, it will take time for the Board and management of the new Museum to determine the most appropriate organizational structure. The details of the structure and the Museum's staffing requirements will be reflected in future Corporate Plans.

The Department of Canadian Heritage has provided the financial and human resources required to begin to establish the Canadian Museum of Immigration at Pier 21 and has incurred costs totaling approximately \$800,000 associated with the Definitive Agreement and the implementation of the new corporation prior to approval of its Corporate Plan. These costs include amounts associated

with fulfilling the Crown's obligations prior to the Closing transactions identified in the Definitive Agreement and with activities undertaken on behalf of the new corporation, including drafting its first Corporate Plan for consideration by the Board of Trustees. The Corporation will reimburse the Department for funds expended on the corporation's behalf.

5.3. STATUTORY APPROPRIATION

Bill C-34 contained a transitional provision whereby, subject to the Government's approval of the Museum's Corporate Plan, Parliament approved a statutory appropriation not to exceed \$15 million. These funds—available for both operating and capital expenditures—will enable the Museum to operate until its appropriations have been granted by Parliament through the regular appropriations cycle.

This was done to bridge the gap between the creation of the new corporation and the flow of normal appropriations, therefore mitigating the risk that the new corporation would be unable to operate during a period of up to ten months. Given the Pier 21 Society's constrained budget, the Government knew that the new Museum could not expect significant funds to be available at the time of the asset transfer to the new Museum. Use of the revenues from the Endowment Fund to be obtained from the Foundation is also restricted to certain activities and would, in any case, be insufficient to cover the costs of the new Museum. The statutory appropriation will enable the Museum to take the necessary steps to complete its inauguration as quickly as possible. The new museum will be able to begin to draw down these funds as soon as its Corporate Plan and operating and capital budgets are approved, thereby ensuring that the new corporation will be able to operate the museum, meet its payroll obligations and hold meetings of the Board of Trustees. It is estimated that the Canadian Museum of Immigration at Pier 21 will require \$4,576,531 for the remainder of 2010-11 and \$3,850,160 in 2011-12 from the statutory funding.

SOME KEY FUNDING PRIORITIES FOR EXPENDITURES DURING THE START-UP PERIOD:

- Costs associated with Board meetings;
- Preparation of the Museum's first Corporate Plan and establishment of an appropriate governance regime;
- Costs related to initial staffing, including the offer of a two year term to permanent Society employees and offers of part-time or casual positions to other staff whose work is essential to the operations of the new museum;
- Recruitment of the first Director/CEO;
- Acquisition of specialized professional services;
- Legal fees;
- Insurance;
- Lease and building operations costs;
- Payments in Lieu of Taxes;
- Fit-up of Immigration Annex for office space; and
- Exhibit and website enhancement.

5.4. PRO FORMA FINANCIAL STATEMENTS

PRO FORMA BALANCE SHEET

FOR THE PERIOD ENDING MARCH 31

(in thousands of dollars)	2010-2011 Projection	2011-2012 Projection	2012-2013 Projection	2013-2014 Projection	2014-2015 Projection
ASSETS					
Current Assets					
Cash and cash equivalents	425	430	165	365	0
Accounts Receivable	10	30	30	25	40
Inventories	50	150	165	170	170
Prepaid Expenses	10	15	15	15	15
	495	625	375	575	225
Other Assets					
Capital Assets	1,637	8,614	9,826	18,888	18,753
	1,637	8,614	9,826	18,888	18,753
TOTAL ASSETS	2,132	9,239	10,201	19,463	18,978
LIABILITIES AND EQUITY OF CANADA					
Accounts Payable and Accrued Liabilities	495	625	375	575	225
Deferred Capital Funding	1,637	8,614	9,826	18,888	18,753
	2,132	9,239	10,201	19,463	18,978
Equity of Canada					
Accumulated Other Comprehensive income	0	0	0	0	0
Retained earnings	0	(1)	(1)	(1)	(1)
	0	(1)	(1)	(1)	(1)
TOTAL LIABILITIES AND EQUITY OF CANADA	2,132	9,237	10,199	19,461	18,976

PRO FORMA STATEMENT OF OPERATIONS

FOR THE YEARS ENDING MARCH 31, 2011 TO MARCH 31, 2015

(in thousands of dollars)	2010-2011 Projection	2011-2012 Projection	2012-2013 Projection	2013-2014 Projection	2014-2015 Projection
Government Funding					
Parliamentary Appropriation		9,974	9,950	18,450	9,900
Statutory Appropriation	4,577	3,850	0	0	0
Amount used to purchase depreciable assets	(1,723)	(7,525)	(2,250)	(10,750)	(2,200)
Amortization of deferred capital funding	86	548	1,038	1,688	2,335
	2,940	6,847	8,738	9,388	10,035
Revenue of the Corporation					
General Admission & Programs	16	300	350	350	450
Gift Shop	15	180	200	210	225
Scotiabank Research Centre	5	60	70	70	80
Facility Rentals & Food Services	20	350	350	200	425
Donations/Grants/Sponsorships	230	515	450	550	750
Interest on cash and investments	5	20	20	20	20
Allocation from Foundation	20	90	150	170	230
	311	1,515	1,590	1,570	2,180
Expenses					
Visitor Experience and Connections	275	2,382	2,861	2,562	2,246
Corporate Management	2,359	4,271	4,736	4,728	4,365
Accommodation	617	1,710	2,731	3,668	5,604
	3,251	8,363	10,328	10,958	12,215
Net Results of Operations	0	(1)	0	0	0
Other Comprehensive Income	0	0	0	0	0
Comprehensive Income	0	(1)	0	0	0

PRO FORMA STATEMENT OF CASH FLOWS

FOR THE PERIOD ENDING MARCH 31

(in thousands of dollars)	2010-2011 Projection	2011-2012 Projection	2012-2013 Projection	2013-2014 Projection	2014-2015 Projection
OPERATING ACTIVITIES					
Cash receipts (clients)	296	1,475	1,570	1,555	2,145
Cash receipts (parliamentary appropriation)	2,940	6,847	8,738	9,388	10,035
Cash paid (employees and suppliers)	(2,816)	(8,338)	(10,593)	(10,763)	(12,565)
Interest received	5	20	20	20	20
Cash flows from operating activities	425	4	(265)	200	(365)
INVESTING ACTIVITIES					
Leasehold improvements	(1,723)	(7,525)	(2,250)	(10,750)	(2,200)
Cash flows used in investing activities	(1,723)	(7,525)	(2,250)	(10,750)	(2,200)
FINANCING ACTIVITIES					
Parliamentary appropriation for the acquisition of assets	1,723	7,525	2,250	10,750	2,200
Cash flows from financing activities	1,723	7,525	2,250	10,750	2,200
Increase (decrease) in cash and cash equivalents	425	4	(265)	200	(365)
Balance at beginning of year	0	425	430	165	365
Balance at end of year	425	429	165	365	0

OPERATING AND CAPITAL BUDGET BY ACTIVITY

FOR THE YEARS ENDING MARCH 31, 2011 TO MARCH 31, 2015

(in thousands of dollars)	2010-2011 Budget	2011-2012 Budget	2012-2013 Budget	2013-2014 Budget	2014-2015 Budget
FUNDING					
Visitor Experience and Connections	275	2,382	2,861	2,562	2,246
Corporate Management	2,359	4,271	4,736	4,728	4,365
Accommodation	2,254	8,687	3,943	12,730	5,469
Sub-total	4,888	15,340	11,540	20,020	12,080
Less revenues	311	1,515	1,590	1,570	2,180
Total budget requirement	4,577	13,825	9,950	18,450	9,900

SUMMARY OF OPERATING AND CAPITAL BUDGET

FOR THE YEARS ENDING MARCH 31, 2011 TO MARCH 31, 2015

(in thousands of dollars)	2010-2011 Budget	2011-2012 Budget	2012-2013 Budget	2013-2014 Budget	2014-2015 Budget
Operating	3,164	7,815	9,290	9,270	9,880
Capital	1,723	7,525	2,250	10,750	2,200
Sub-total	4,888	15,340	11,540	20,020	12,080
Less revenues	311	1,515	1,590	1,570	2,180
Government Funding Required	4,577	13,825	9,950	18,450	9,900

PROJECTED REVENUES FROM ON-SITE ACTIVITIES

FOR THE YEARS ENDING MARCH 31, 2011 TO MARCH 31, 2015

Pier 21 (in thousands of dollars)	2010-2011 Projection	2011-2012 Projection	2012-2013 Projection	2013-2014 Projection	2014-2015 Projection
General admission & Progr	16	300	350	350	450
Gift Shop sales	15	180	200	210	225
Facility Rentals and Food Services	20	350	350	200	425
Walls of Service and Tribute sales	1	60	60	50	80
Scotiabank Research Centre sales	5	60	70	70	80
Total on-site revenue	57	950	1,030	880	1,260
Attendance (in thousands)	3	45	47	40	55
Revenue per visitor	\$19.00	\$21.11	\$21.91	\$22.00	\$22.91
% Change		11%	4%	0%	4%