Local Labour Market Plan

October 2015

BUSINESS

PARTNERSHIPS

LABOUR

Sudbury & Manitoulin

Workforce Planning

Planification en main-d'oeuvre

RESEARCH

EQUITY

EDUCATION / TRAINING / JOBS

LOCAL LABOUR MARKET PLAN 2015

Sudbury & Manitoulin
Workforce Planning
Planification en main-d'oeuvre

MISSION STATEMENT

To coordinate identified education and training needs in order to generate opportunities for economic growth in the communities we serve.

BOARD MANDATE

The Board is active in the following labour market-related areas: labour market information and research; analysis and advice; planning; access and equity; and lifelong learning.

Workforce Planning for Sudbury & Manitoulin (WPSM) is one of twenty-six (26) local planning boards in Ontario. Our role is to engage key partners across the Sudbury and Manitoulin Districts to address local labour market issues. Given our unique and neutral role, we bridge various labour market partners such as: business; labour; employment service providers; educators/trainers; economic development organizations; and others to examine current/projected issues and explore potential solutions. This report, the Local Labour Market Plan (LLMP) 2015, provides a foundation on which to build. It provides evidence-based research, corroborated by information from key stakeholders...all of which contributes to informed planning, decision-making and action.

For more information please go to: www.planningourworkforce.ca
or contact info@planningourworkforce.ca

This Employment Ontario Project is funded by the Government of Ontario

EMPLOYMENT ONTARIO

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The assistance of Tom Zyzis for his data consultation expertise, translator Jean-Charles Cachon and WPSM Administrative Assistant Colleen Johnson Malette and Research Intern Dawn Graham are acknowledged for their contributions to this report.

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VALUE OF LABOUR MARKET INFORMATION

Everyone is talking about the need for good LMI (Labour Market Information) but what is LMI? and what is it used for? LMI is a lot of things. First and foremost it provides foundational information to make decisions. LMI helps us better understand which industries are growing and declining. It helps us look at workforce size in local businesses and occupations within those businesses. Data also provides information on age and educational attainment of those eligible to work, in-migration/out-migration patterns of our workforce, and employment rates by field of study. Researchers, economists and others use LMI to track industry trends and employment rates, and prepare forecasts for the future. Postsecondary institutions use it to plan course offerings. Various levels of government consider LMI when developing strategies and making funding decisions. And employment services use it to identify training needs and help job-seekers find jobs.

While LMI is useful there are limitations. In many cases, sources used tend to be too broad or general in nature. In their July 2012 report *Labour Shortages in Skilled Trades – The Best Guesstimate?* Lefebvre et al. note that a "Pan-Canadian assessment of labour shortages is not informative as it may conceal instances of imbalances at a more detailed regional level" (Lefebvre et al., 2012). So while we have some useful but limited LMI for Greater Sudbury and the Districts of Sudbury & Manitoulin, it is not as detailed as we would like for the smaller demographic populations and industries that exist in our larger geographic/rural and remote areas.

LMI does however help us examine the bigger picture and some of the historical trends, but again, it is only a snapshot in time with limited insight into why changes are happening or how to address them. This is further compounded by other labour market influences that are harder to track - such as the impact of: changes in the global economy (and subsequent impact on industries like mining, oil, gas and wood products); advancement of new/modernized technologies; location and availability of workforce training; increased outsourcing; regulatory changes; rates of retirement (and/or older workers staying longer or re-entering the labour force); and industry restructuring and downsizing. Even if we could predict some of these factors, how does this help us understand the current and future workforce needs of local employers?

Unfortunately, the level of detail needed to be helpful to local planners, postsecondary institutions, employers, employment services, economic developers and others on a day-to-day basis is not available without further research. Some industries such as forestry and manufacturing are conducting their own LMI studies to gather *evergreen* (real-time) data to help position their industries for the future. They understand the value of detailed LMI to support the sustainability, growth and profitability of their industry. The USA Department of Labour (Sept 2014) explored the value of *Real-Time LMI* and found that is it an "effective supplement to traditional LMI" but requires the expertise of a skilled LMI analyst to interpret the data.

To supplement available LMI, at Workforce Planning for Sudbury & Manitoulin, we also collaborate with others to conduct local studies to better understand what is happening in our own backyard. Over the last few years, all six northern workforce planning boards have worked together to explore workforce needs in the mining and tourism industries. We are also in our second year of conducting the *employerone survey* to gain a better understanding of local employers re: the age of their workforce, projected vacancies, recruitment strategies and challenges, and their perspective on candidate skills, education and training. Last year almost 700 northern employers participated in the 2014 *employerone survey* and we hope to bolster that number this year. Local survey results can be found on our website at: www.planningourworkforce.ca.

Getting back to the initial questions surrounding the value of LMI; good and detailed LMI is invaluable. It helps guide economic and workforce development planning which in turn helps us to prepare our current and future workforce, while at the same time, support local businesses and industries that drive our economy and pave the way for business growth, expansion and new business investment.

Reggie Caverson
Executive Director

About this report

While workforce planning boards across Ontario report different labour market issues, each is a major source of labour market information for their Board area. Workforce Planning for Sudbury & Manitoulin continues to strive to be that source of information for our local area. We use various labour market indicators, research and other sources to guide our work. This Local Labour Market Plan (LLMP) 2015 includes the following LMI: number of businesses by employee size range; top five industries for our census areas; estimated population figures; migration patterns (origin and destination); and unemployment trends. We use data that is available through Statistics Canada[1] which is further supplemented by key stakeholder meetings, discussions, local consultations and data from other current and credible sources and reports.

To provide a context for the demand side of the labour market, notable industry changes and employment trends are highlighted throughout this report, along with emerging workforce themes that continue to require our individual and collective attention. Some of this is supplemented by information from the *2014 employerone survey* which provides valuable insights into workforce challenges that employers are experiencing.

Similar to last year's LLMP, data from Employment Ontario has been included to help us understand the supply side of the labour market; in other words, who is looking for work, training and/or employment assistance. This information provides insights into those who are available to do the work and some of the challenges being experienced when trying to match potential employees with industry needs. Employment Ontario information includes client data from: Employment Services; Literacy and Basic Skills; the Second Career initiative; and those who are/or have registered to be an Apprentice. This is supplemented by consultations with Employment Ontario Service Provider managers and their staff who have provided their perspectives on: needs, gaps, training and education, opportunities to improve service, fit with available industry jobs, emerging trends and geographic differences.

Last, this report provides a brief update on some of the actions that are being undertaken by Workforce Planning for Sudbury & Manitoulin to support various labour market initiatives across our Board area. While we may not have a lead role on these initiatives (like we do in our partnerships), we continue to provide support where appropriate.

WPSM board area

The Workforce Planning for Sudbury & Manitoulin catchment area includes the following census areas: the District of Manitoulin, the District of Sudbury and Greater Sudbury (CMA). New information on changes in various industries and labour market indicators for each census area is provided where available.

Unfortunately, Employment Ontario data is currently not available to local workforce planning boards by census area and will only be reported as aggregate information for our entire catchment area (WPSM Board area). This limitation and others are noted in the section: *Employment Ontario programs: Limitations.*

For more information on the WPSM catchment area, go to: www.planningourworkforce.ca under *What we do – areas served.*

[1] *The LLMP acknowledges, but does not report on job gains and losses due to restructuring and funding allocations in the public and/or non-profit sectors. However, the employerone survey does include employers in the private, public and non-profit sectors.*

LABOUR MARKET INFORMATION - INDICATORS

CANADIAN BUSINESS COUNTS

Statistics Canada maintains an on-going count of business establishments across the country, relying on administrative data (corporate income tax and GST files) and surveys of businesses. This registry of businesses used to be reported as Canadian Business Patterns. Over the last year, Statistics Canada has changed some of its information gathering practices, as well as how some of the data is reported, to the extent that it is not possible to accurately compare this dataset to that of previous years. The most significant impact has been the addition of some 1,200,000 businesses without employees across the Canadian database. To signify all these changes, this new dataset is now called *Canadian Business Counts*.

As a result, only this year's data will be profiled and various components highlighted. To provide a context, some of this data will be compared to regional and provincial averages.

NUMBER OF BUSINESSES BY SIZE OF ESTABLISHMENT AND BY INDUSTRY:

Tables 1, 2 and 3 on the following three pages provide summary data for all businesses located in the Manitoulin District, the Sudbury District and Greater Sudbury for June 2015. Each of these tables provides two different counts:

1. **ALL BUSINESSES - CLASSIFIED AND UNCLASSIFIED**:
   - that is, whether or not their industry classification is known;
   - this information is profiled in the size of establishment data;
   - the last three rows of the table present the distribution of these businesses by number of employees;
   - roughly 11-13% of the total counts in each of the three WPSM Board census areas (Manitoulin District, Sudbury District and Greater Sudbury) represent businesses that are unclassified, which is slightly lower than the provincial average of 14%;
2. **CLASSIFIED BUSINESSES**:
   - the breakdown of all businesses for which industry classification is available;
   - this is the information provided by the industry rows in the table, the major part of the table.

For each of the following three tables please note:

- The second-to-last column shows the percentage distribution of all classified businesses by industry.
- The last column shows the ranking of the total number of classified businesses by industry, from the largest (1) to the fewest (20) number of businesses.
- The five industries with the greatest number of classified businesses have their ranking numbers underlined and in red.
- The highlighted cells identity the three industries with the largest number of firms for each employee size category column.
- 0% does not mean there are no firms in that category, only that the number of firms, when expressed as a percentage of the total, is below 0.5% and has been rounded down to 0%.

TABLE 1 – MANITOULIN DISTRICT NUMBER OF BUSINESSES BY EMPLOYEE SIZE RANGE June 2015										
INDUSTRY SECTOR 2-DIGIT NAICS	NUMBER OF EMPLOYEES								% of all	RANK
	0	1-4	5-9	10-19	20-49	50-99	100+	TOTAL		
11 Agriculture, Forestry, Fishing	108	15	0	1	0	1	0	125	13	1
21 Mining	4	0	0	0	0	0	0	4	0	20
22 Utilities	7	0	0	0	0	0	0	7	1	19
23 Construction	47	36	10	6	0	0	0	99	10	3
31-33 Manufacturing	13	5	7	0	0	0	0	25	3	11
41 Wholesale Trade	16	3	3	0	0	0	0	22	2	13
44-45 Retail Trade	42	27	26	15	4	3	0	117	12	2
48-49 Transportation/Warehousing	27	8	3	5	1	2	2	48	5	9
51 Information and Cultural	6	4	1	1	0	0	0	12	1	17
52 Finance and Insurance	27	5	1	0	5	0	0	38	4	10
53 Real Estate, Rental, Leasing	88	5	1	1	0	0	1	96	10	5
54 Professional, Scientific, Tech.	42	15	3	0	1	1	0	62	6	8
55 Management of Companies	12	1	2	0	0	0	0	15	2	16
56 Administrative Support	11	8	3	1	0	1	1	25	3	11
61 Educational Services	3	4	0	0	0	0	1	8	1	18
62 Health Care and Social Assist.	25	21	12	5	3	5	2	73	7	7
71 Arts, Entertainment and Rec.	11	6	2	1	1	0	0	21	2	14
72 Accommodation and Food	49	21	15	11	2	0	0	98	10	4
81 Other Services	39	30	4	3	1	3	0	80	8	6
91 Public Administration	1	3	1	6	2	4	2	19	2	15
CLASSIFIED BUSINESSES	578	217	94	56	20	20	9	994		
% of all classified and unclassified businesses	60%	22%	9%	5%	2%	2%	1%	100%		
Cumulative %	60%	81%	90%	95%	97%	99%	100%			
ONTARIO % of all classified and unclassified businesses	69%	18%	6%	4%	3%	1%	1%			

Source: Statistics Canada, Canadian Business Counts

TABLE 2 – SUDBURY DISTRICT NUMBER OF BUSINESSES BY EMPLOYEE SIZE RANGE June 2015										
INDUSTRY SECTOR 2-DIGIT NAICS	NUMBER OF EMPLOYEES								% of all	RANK
	0	1-4	5-9	10-19	20-49	50-99	100+	TOTAL		
11 Agriculture, Forestry, Fishing	93	30	5	6	3	0	0	137	9	5
21 Mining	4	0	0	1	0	2	3	10	1	20
22 Utilities	10	0	1	3	0	0	0	14	1	18
23 Construction	110	67	17	6	3	0	0	203	14	1
31-33 Manufacturing	19	11	2	2	4	2	2	42	3	10
41 Wholesale Trade	22	8	3	0	1	1	0	35	2	12
44-45 Retail Trade	66	36	36	27	5	2	2	174	12	4
48-49 Transportation/Warehousing	63	26	7	3	2	2	1	104	7	7
51 Information and Cultural	2	5	4	0	0	0	0	11	1	19
52 Finance and Insurance	27	4	3	3	5	0	0	42	3	10
53 Real Estate, Rental, Leasing	159	12	1	2	1	1	0	176	12	3
54 Professional, Scientific, Tech.	47	10	3	2	1	0	0	63	4	9
55 Management of Companies	18	1	0	0	0	0	0	19	1	16
56 Administrative Support	20	8	1	2	0	0	1	32	2	13
61 Educational Services	13	1	2	0	0	0	0	16	1	17
62 Health Care and Social Assist.	24	21	6	7	6	2	2	68	5	8
71 Arts, Entertainment and Rec.	11	10	4	2	1	0	0	28	2	14
72 Accommodation and Food	103	35	20	11	7	2	0	178	12	2
81 Other Services	67	40	11	1	0	0	0	119	8	6
91 Public Administration	2	3	3	3	8	2	2	23	2	15
CLASSIFIED BUSINESSES	880	328	129	81	47	16	13	1494		
% of all classified and unclassified businesses	61%	21%	8%	5%	3%	1%	1%	100%		
Cumulative %	61%	82%	90%	95%	98%	99%	100%			
ONTARIO % of all classified and unclassified businesses	69%	18%	6%	4%	3%	1%	1%			

Source: Statistics Canada, Canadian Business Counts

TABLE 3 – GREATER SUDBURY NUMBER OF BUSINESSES BY EMPLOYEE SIZE RANGE June 2015										
INDUSTRY SECTOR 2-DIGIT NAICS	NUMBER OF EMPLOYEES								% of all	RANK
	0	1-4	5-9	10-19	20-49	50-99	100+	TOTAL		
11 Agriculture, Forestry, Fishing	76	14	6	5	3	0	0	104	1	17
21 Mining	66	19	4	5	4	7	11	116	1	15
22 Utilities	11	1	2	0	0	1	0	15	0	19
23 Construction	634	243	130	60	53	15	13	1148	11	2
31-33 Manufacturing	91	49	43	29	32	13	7	264	2	13
41 Wholesale Trade	143	76	67	69	39	9	4	407	4	9
44-45 Retail Trade	392	219	196	160	92	28	18	1105	10	3
48-49 Transportation/Warehousing	211	50	22	24	14	6	4	331	3	11
51 Information and Cultural	65	11	4	8	5	3	3	99	1	18
52 Finance and Insurance	488	85	51	22	43	3	2	694	6	7
53 Real Estate, Rental, Leasing	2184	136	36	25	24	2	1	2408	22	1
54 Professional, Scientific, Tech.	658	241	59	32	34	11	1	1036	10	4
55 Management of Companies	278	17	8	5	6	0	1	315	3	12
56 Administrative Support	166	74	40	35	19	14	12	360	3	10
61 Educational Services	59	16	12	2	10	2	9	110	1	16
62 Health Care and Social Assist.	403	335	115	84	42	11	18	1008	9	5
71 Arts, Entertainment and Rec.	95	39	19	17	9	3	2	184	2	14
72 Accommodation and Food	117	54	61	105	79	32	2	450	4	8
81 Other Services	359	235	108	55	27	8	3	795	7	6
91 Public Administration	1	2	0	0	2	1	1	7	0	20
CLASSIFIED BUSINESSES	6497	1916	983	742	537	169	112	10956		
% of all classified and unclassified businesses	62%	17%	8%	6%	5%	1%	1%	100%		
Cumulative %	62%	79%	87%	93%	98%	99%	100%			
ONTARIO % of all classified and unclassified businesses	69%	18%	6%	4%	3%	1%	1%			

Source: Statistics Canada, Canadian Business Counts

OBSERVATIONS:

The majority of businesses in the Manitoulin District, Sudbury District and Greater Sudbury are made up of small establishments. What is important to note however is that 60-62% of all firms for the Manitoulin District, Sudbury District and Greater Sudbury have no employees.[2] In other words, they are owner-operated firms and we have learned from our surveys and consultations with employers, that many of these firms (that have no employees) are not hiring and/or do not plan to hire. This figure however is noticeably below the provincial average where 69% of firms have no employees and yet somewhat higher than northern Ontario where the number of firms with no employees hovers in the high 50% range. When the Districts of Manitoulin and Sudbury are combined with Greater Sudbury, there is also a higher proportion of firms with 1 to 4 employees, in the 17-22% range.

Table 4 lists the top five industries by number of firms for the Manitoulin District, the Sudbury District and Greater Sudbury, and compares these to the top five industries in Ontario in ranked order.

TABLE 4 – TOP FIVE INDUSTRIES BY NUMBER OF FIRMS (June 2015)
Manitoulin District, Sudbury District, Greater Sudbury and Ontario

MANITOULIN	SUDBURY	GREATER SUDBURY	ONTARIO
Agriculture, forestry, fishing	Construction	Real Estate, Rental, Leasing	Real Estate, Rental, Leasing
Retail Trade	Accommodation & Food Services	Construction	Professional Scientific Technical Services
Construction	Real Estate, Rental, Leasing	Retail Trade	Construction
Accommodation & Food Services	Retail Trade	Professional Scientific Technical Services	Retail Trade
Real Estate, Rental, Leasing	Agriculture, forestry, fishing	Health Care & Social Assistance	Health Care & Social Assistance

POPULATION

Since the census is only taken every five years, Statistics Canada develops population estimates based on population change for each area (births, deaths, migration) and adjusts the census numbers based on under-coverage from non-response. Table 5 presents the population estimates for the Manitoulin District, the Sudbury District and Greater Sudbury, for July 1st of each year, and provides the ranking for each of these census areas in terms of rate of growth among the 49 census divisions that constitute the province of Ontario.

TABLE 5 – ESTIMATED POPULATION (JULY 2011 - 2014)
Manitoulin District, Sudbury District and Greater Sudbury

CENSUS AREA	2011	2012	2013	2014	% CHANGE 2011-2014	RANK in ONTARIO
Manitoulin	13,336	13,443	13,487	13,524	1.4%	21st
Sudbury	21,633	21,368	21,134	20,887	-3.4%	48th
Greater Sudbury	164,853	165,077	165,237	165,279	0.3%	32nd

Statistics Canada, Estimates of Population, CANSIM Table 051-0062

[2] *This actually undercounts the number of self-employed individuals. The Statistics Canada's Canadian Business Counts database does not include unincorporated businesses that are owner-operated (no payroll employees) and that earn less than $30,000 in a given year.*

The Manitoulin and Sudbury Districts have relatively smaller populations, whose growth is heading in opposite directions, with the Manitoulin District estimated to be growing 1.4% between 2011 and 2014, and the Sudbury District declining by 3.4%. Greater Sudbury is just slightly above zero in its growth, at 0.3% over those four years. The *2015 Economic Outlook – Greater Sudbury* report prepared by the Greater Sudbury Chamber of Commerce (January 2015) notes that the City of Greater Sudbury lags behind the provincial average in terms of population growth and that projected growth for 2015-16 will remain very low at 0.1%

MIGRATION PATTERNS

The following tables provide migration data for all three census areas, listing in-migration, out-migration and the net migration figures, by age categories for 2011-12 and 2012-13, the latest years for which data is available. In addition, the top five places of origin for in-migrants and top five destinations for out-migrants are provided, offering the total number of persons who in-migrate and out-migrate.

MANITOULIN DISTRICT:

TABLE 6 – MANITOULIN DISTRICT MIGRATION DATA 2011-12, 2012-13

AGE RANGE	2011-2012			2012-2013		
	In-migrants	Out-migrants	Net migrants	In-migrants	Out-migrants	Net migrants
0-17 year olds	135	106	29	118	108	10
18-24 year olds	62	97	-35	61	85	-24
25-44 year olds	147	134	13	126	134	-8
45-64 year olds	176	55	121	155	68	87
65 years & older	64	60	4	48	40	8
TOTAL	584	452	132	508	435	73

Based on the 2011-12 and 2012-13 data, one can say that each year, roughly 3% of the Manitoulin population leaves the area, but a slightly larger amount of people move in, with a net change in migration of around plus 1%. By and large, Manitoulin gains population across all age groups except for 18 to 24 year olds, where there has been a small decrease in population over these two years.

TABLE 7 – MANITOULIN DISTRICT TOP FIVE ORIGIN AND DESTINATION REGIONS CUMULATIVE FIGURES FOR 2011-12 AND 2012-2013

Moving to Manitoulin District from:		Moving from Manitoulin District to:	
Greater Sudbury	308	Greater Sudbury	333
Simcoe	77	Algoma	78
Toronto	71	Sudbury District	62
Sudbury District	55	Toronto	46
Algoma	52	Simcoe	37

Table 7 shows the top five places of origin and of destination for migrants coming into and leaving Manitoulin. The data for two years have been added together. Clearly, the greatest amount of movement is between Manitoulin and Greater Sudbury, for both individuals coming and going. In fact, the net difference over two years is very small indeed. The other four regions, for both origin and destination, are interestingly the same ones, just a different order in their ranking.

SUDBURY DISTRICT:

Based on the results of these two years, one can see that the Sudbury District has a net out-flow of migrants, more or less across all age categories (there are only two positive entries across the two years). The biggest net out-flow is among youth aged 18 to 24 years of age.

TABLE 8 – SUDBURY DISTRICT MIGRATION DATA 2011-12 AND 2012-13						
	2011-2012			2012-2013		
AGE RANGE	In-migrants	Out-migrants	Net migrants	In-migrants	Out-migrants	Net migrants
0-17 year olds	281	287	-6	265	250	15
18-24 year olds	139	254	-115	122	232	-110
25-44 year olds	336	413	-77	323	340	-17
45-64 year olds	304	260	44	253	282	-29
65 years & older	87	165	-78	81	154	-73
TOTAL	1147	1379	-232	1044	1258	-214

As was the case with Manitoulin, the migration between the Sudbury District and Greater Sudbury is much larger than between any other region, with a net balance in Greater Sudbury's favour. The next two significant regions, for both in- and out-migration, are Algoma and Nipissing.

TABLE 9 – SUDBURY DISTRICT TOP FIVE ORIGIN AND DESTINATION REGIONS CUMULATIVE FIGURES FOR 2011-12 AND 2012-2013				
Moving to Sudbury District from:			Moving from Sudbury District to:	
Greater Sudbury	1015		Greater Sudbury	1285
Algoma	186		Algoma	210
Nipissing	98		Nipissing	193
Cochrane	94		Parry Sound	112
Simcoe	69		Cochrane	88

GREATER SUDBURY:

The migration patterns by age for Greater Sudbury are the same for 2011-12 and 2012-13 where there is a net increase in population among those 45 years of age or younger, and a net decrease among those 45 years of age and older, with a small net increase in net migration.

TABLE 10 – GREATER SUDBURY MIGRATION DATA 2011-12, 2012-13						
	2011-2012			2012-2013		
AGE RANGE	In-migrants	Out-migrants	Net migrants	In-migrants	Out-migrants	Net migrants
0-17 year olds	953	879	74	816	759	57
18-24 year olds	954	865	89	809	714	95
25-44 year olds	1811	1680	131	1529	1403	126
45-64 year olds	740	842	-102	633	801	-168
65 years & older	277	349	-72	257	340	-83
TOTAL	4735	4615	120	4044	4017	27

The distribution of migration figures is more evenly distributed in the case of Greater Sudbury. Movement between Greater Sudbury and the Sudbury District is easily the largest relationship; however there is also significant movement with a range of other regions, not only in the immediate vicinity, but also with Toronto and Ottawa.

TABLE 11 – GREATER SUDBURY TOP FIVE ORIGIN AND DESTINATION REGIONS CUMULATIVE FIGURES FOR 2011-12 AND 2012-2013				
Moving to Greater Sudbury from:			Moving from Greater Sudbury to:	
Sudbury District	1285		Sudbury District	1015
Algoma	724		Toronto	646
Nipissing	706		Nipissing	634
Cochrane	625		Ottawa	574
Toronto	513		Algoma	470

Overall, migration patterns provide important insights into the potential growth and decline of the labour force. On a larger scale, a 2015 TD Economics report, *From a Longer Term Growth Perspective, West is Still Best* supports the notion that inter-provincial migration is an important factor in population growth for a province (Bartlett et al., April 2015). While the majority of in-migration/out-migration patterns for the WPSM Board area are generally within the same province, understanding migration patterns is helpful to understanding changes in the size of the labour force.

UNEMPLOYMENT TRENDS

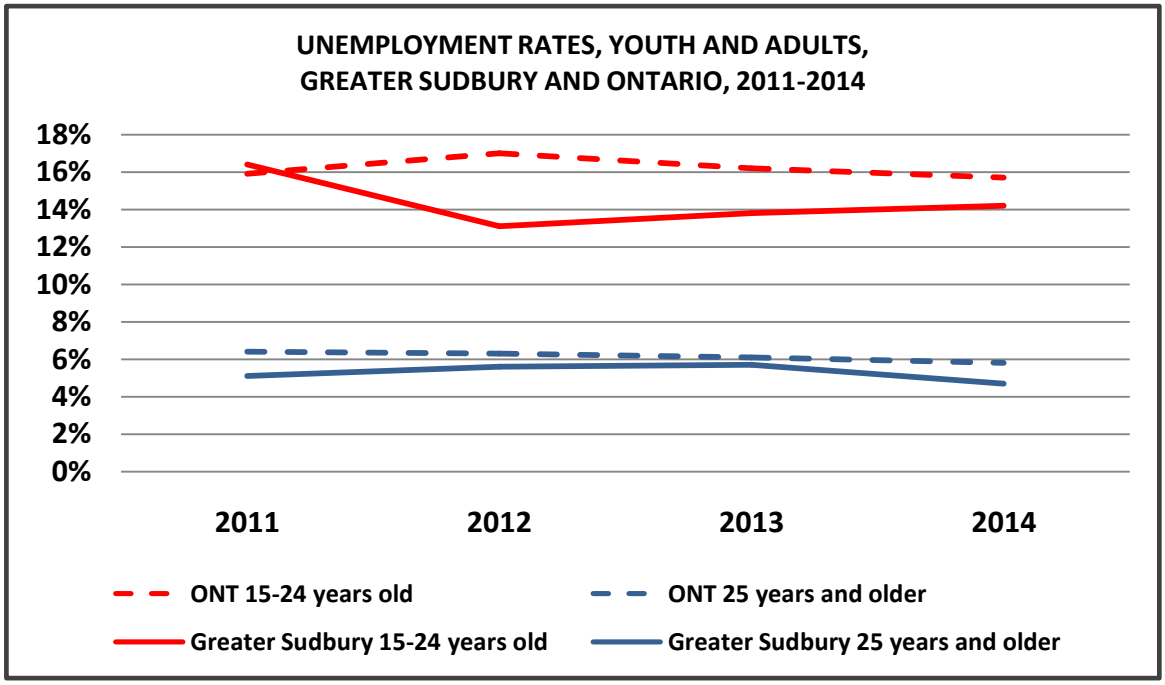
The month-to-month unemployment statistics regularly reported in the media rely on the results of Statistics Canada's Labour Force Survey (LFS). As a survey, the LFS relies on a sample of responses which, when examining a smaller area, becomes unreliable. As a result, the LFS results are only available for the Greater Sudbury area (the Sudbury Census Metropolitan Area).

These results are nonetheless relevant, as Greater Sudbury accounts for 80% of the population of the local workforce in the WPSM Board area. Based on the 2011 National Household Survey and the 2006 Census, it is known that the Manitoulin District and the Sudbury District typically have lower labour force participation

rates and higher unemployment rates than Greater Sudbury. With that context in mind, Table 12 shows the unemployment rates for youth (15 to 24 years old) and for adults (25 years and older), comparing Greater Sudbury and Ontario, for the years 2011 to 2014.

TABLE 12 – UNEMPLOYMENT RATES, YOUTH AND ADULTS GREATER SUDBURY				
	2011	2012	2013	2014
YOUTH: 15-24 YEARS OLD				
Sudbury CMA	16.4%	13.1%	13.8%	14.2%
Ontario	15.9%	17.0%	16.2%	15.7%
ADULTS: 25 YEARS AND OLDER				
Sudbury CMA	5.1%	5.6%	5.7%	4.7%
Ontario	6.4%	6.3%	6.1%	5.8%

The unemployment rate for both youth and adults in Greater Sudbury has generally been lower than that experienced at the provincial level. However, while the Greater Sudbury adult rate has been dropping pretty much in tandem with the Ontario rate, the Greater Sudbury youth rate has been rising the past two years, even as the provincial rate has been dropping. The following chart illustrates these trends.



EMPLOYMENT ONTARIO PROGRAMS

BACKGROUND

This section examines data provided by MTCU to workforce planning boards across Ontario. This data provides aggregate information on individuals who register as a client with one of the following Employment Ontario (EO) programs: *Employment Services (ES), Literacy and Basic Skills (LBS), Second Career* or *Apprenticeships.* Client information is captured on the CaMS (Case Management System) database; however, in order to be part of the data reported here, all clients (with the exception of apprentices) must have exited the system before the ministry's fiscal year end of March 31, 2015. As noted, all data is in aggregate form in order to ensure that the identity of an individual client and/or organization remains confidential.

Employment Services also counts the number of people who come in to use their services but are not registered as a client. Services might include assistance with resumes, online job applications and various government forms, as well as access to job boards, computers, and job searches and sites on the internet. These R & I clients (Resource & Information) are not captured in the overall *ES* data.

Employers are also encouraged to use *ES* to post jobs and access *ES* assistance to review resumes and conduct interviews, however it is not clear how this information is tracked or reported. In some cases, in smaller rural communities, *ES* has become an unofficial public service centre hub where people go to ask questions about the location and availability of other unrelated services and/or resources.

UNDERSTANDING THE LIMITATIONS OF THE CaMS DATA

While the CaMS data provides information on clients using EO services, there are limitations as follows:

- All Employment Ontario client data for the WPSM Board area is only provided as an aggregate number – meaning that all three highly diverse census areas are lumped together.
- Data is provided in such a way that it is not possible to make comparisons within or across programs.
- Various designated groups are underrepresented as not all EO funded *Employment Services* such as those offered by March of Dimes (for persons with disabilities seeking employment) are reported on or fit the CaMS criteria. March of Dimes reports that they have approximately 600 clients on their caseload per year. As such, disability data reported here must be taken with caution as it does not tell the whole story.
- Although recommendations have been made to MTCU to change age breakdowns reported by CaMS, ALL service providers feel that the age categories used for reporting are far too broad to be meaningful.

To address these and other limitations, a context for interpreting the data is necessary. In some cases, this involves comparing total client numbers in the WPSM Board area to the rest of Ontario, and in other instances, comparing current 2014-15 data to 2013-14 data. EO Service Providers were also consulted to gain further insights into program and census area differences to balance the limitations of the current data. Nevertheless, the data, along with these consultations, provides useful information on trends and use of EO services.

EMPLOYMENT SERVICES (ES) CLIENT DATA

ES CLIENTS BY NUMBER OF CLIENTS:

Table 13 compares the number of unassisted R & I clients and the number of *ES* (assisted) clients served in the WPSM Board area, northern Ontario and Ontario between 2013-14 and 2014-15.

Across the WPSM Board area and northern Ontario, there has been an increase in both unassisted R & I clients and assisted *ES* clients. Across Ontario, the number of R & I clients has declined and the number of *ES* clients has increased yet the total number of people served across Ontario by *ES* overall has declined.

While it is difficult to interpret the reasons why, it may be that there is greater access to other services across Ontario than there is in the WPSM Board area. It is also important to note that EO Service Providers in the WPSM Board Area who were consulted feel that: a) R & I client numbers reported are low and actually

undercount the number of people who use their services; b) calculating a true R & I client number is difficult as one person may come in multiple times and as such may not be recorded consistently; and c) even though someone is designated as an unassisted R & I client, they still receive service, so in essence they are assisted but not identified as such as they have not registered. EO Service Providers questioned the distinction.

TABLE 13 – CHANGES IN NUMBER OF R & I CLIENTS AND ES CLIENTS FROM 2013-14 & 2014-15						
CLIENT CATEGORY	WPSM Board area		Northern		Ontario	
	2013-14	2014-15	2013-14	2014-15	2013-14	2014-15
Unassisted R & I clients	6,120	8,246	27,893	30,803	488,402	473,710
ES clients	4,201	4,325	17,365	17,820	196,558	201,886
Total	10,321	12,571	45,258	48,623	684,960	675,596

ES CLIENTS BY AGE GROUP:

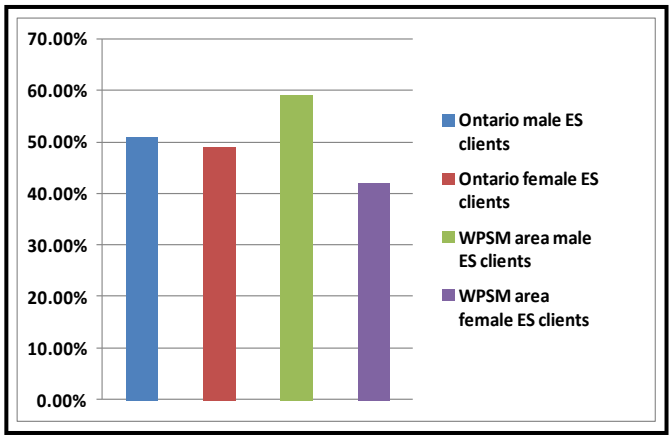
Table 14 provides an overview of reported age by ES clients across the WPSM Board area, northern Ontario and Ontario. Adults aged 25-44 years continue to be over-represented among *ES* clients across all Board areas; however local EO Service Providers feel that the age categories are not very useful as they are far too wide and should match government funded and age-specific programs. This is particularly true for youth 18 and under as they may not be eligible for some programs which skews the data. Other consultations have also noted that there continues to be a lack of youth uptake even when services are offered (Regional Workforce Priorities Information Exchange and Networking Event Summary Report, 2015).

TABLE 14 – DISTRIBUTION BY AGE OF ES CLIENTS 2013-14 & 2014-15						
AGE RANGE	ES clients 2013-14			ES clients 2014-15		
	Board area	Northern	Ontario	Board area	Northern	Ontario
15-24 years	28%	31%	23%	30%	33%	26%
25-44 years	49%	45%	47%	47%	43%	46%
45-64 years	23%	24%	30%	22%	23%	28%
over 65 years	1%	1%	1%	1%	1%	1%

ES CLIENTS BY GENDER:

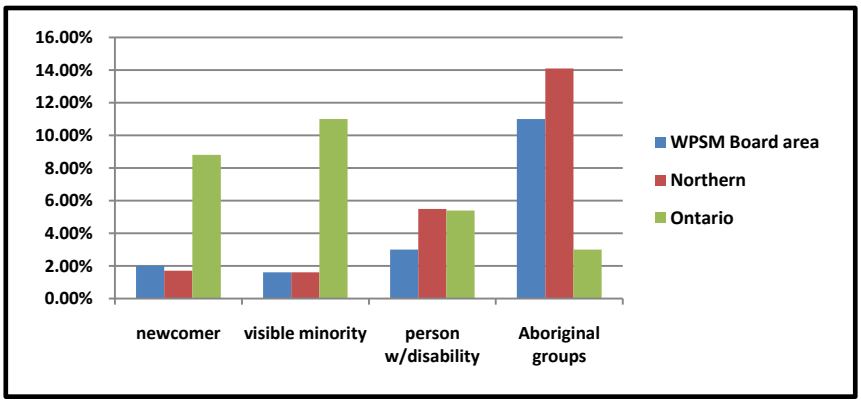
In 2014-15, in the WPSM Board area, 59% of all *ES* clients were male vs. 41% were female. This is consistent with the 2013-14 data.

EO Service Providers were asked their thoughts on why there are more male than female *ES* clients. Their impressions are that more males have either lost or left their job (restructuring, lay-offs, quit or retired) and need or want to work. Some males are interested in retraining to improve longer term job prospects. Others who have retired early are looking for work as they need to supplement their retirement income and/or are still wanting to make a contribution through work. For older adult males, some are bored with retirement and want to continue working but face additional biases as an older worker making it harder for them to find a job.



ES CLIENTS BY DESIGNATED GROUPS:

MTCU collects *ES* client data on designated groups, namely: newcomers, visible minorities, persons with disabilities, and members of Aboriginal groups. This information is self-reported and it is not evident how many individuals declined to answer this question or did not self-identify. EO Service Providers in Greater Sudbury noted that clients who are Aboriginal tend not to self-identify whereas in the Espanola/Manitoulin area this is common practice. Additionally, accurate labour market data regarding persons with disabilities is not available and *ES* clients may be concerned that disclosure could cause employment discrimination.



Overall, this graph (left) does not elicit any surprises. One would expect, for example, to see a smaller proportion of newcomers among *ES* clients in the WPSM Board area and in northern Ontario generally compared to Ontario (as these are not destination areas); and conversely a larger proportion of Aboriginal people, given their share of the general population.

EO Service Providers in Greater Sudbury have noticed a slight increase in the number of newcomers, even though Newcomer Services have been provided by YMCA Employment Ontario Services since 2010. EO Service Providers in the Espanola/Manitoulin area have seen a slight increase in newcomer employment and business ownership. MTCU data also reported that 119 *ES* clients were internationally trained professionals.

ES CLIENTS BY EDUCATIONAL ATTAINMENT:

It is well known that those with lower levels of educational attainment have a harder time finding employment. In Ontario, in 2014, the unemployment rate for those without a high school diploma (no certificate) is more than double that of individuals with a university degree, a college diploma, a trades' certificate or some postsecondary education. As a result, it is important to consider educational attainment levels by *ES* clients and the impact that this has on employment outcome.

TABLE 15 – EDUCATIONAL ATTAINMENT LEVELS AMONG ES CLIENTS 2013-14 & 2014-15

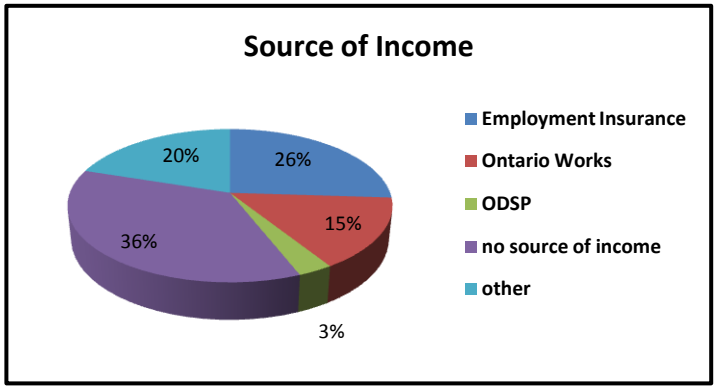
EDUCATION LEVEL	ES clients 2013-14			ES clients 2014-15		
	Board area	Northern	Ontario	Board area	Northern	Ontario
Less than grade 12	20.8%	24.6%	13.0%	21.1%	23.5%	12.6%
High school	28.4%	31.2%	29.8%	28.7%	32.2%	31.0%
"Other"	11.2%	9.3%	6.6%	10.5%	9.4%	5.8%
Trades or college	32.2%	28.0%	27.4%	32.4%	28.4%	27.4%
University	7.5%	6.9%	23.2%	7.4%	6.5%	23.2%

"Other" refers to those with a university diploma less than a Bachelor's degree.

Table 15 illustrates that in the WPSM Board area and northern Ontario, there is a higher proportion of individuals with grade 12 or less who seek Employment Services compared to the provincial numbers. According to some of the local EO Service Providers, this percentage might even be higher based on geographic area of services. Additionally some of the EO Service Providers felt that for areas outside of Greater Sudbury the number of clients with trades or college diplomas is much lower in their specific service area.

ES CLIENTS SOURCE OF INCOME:

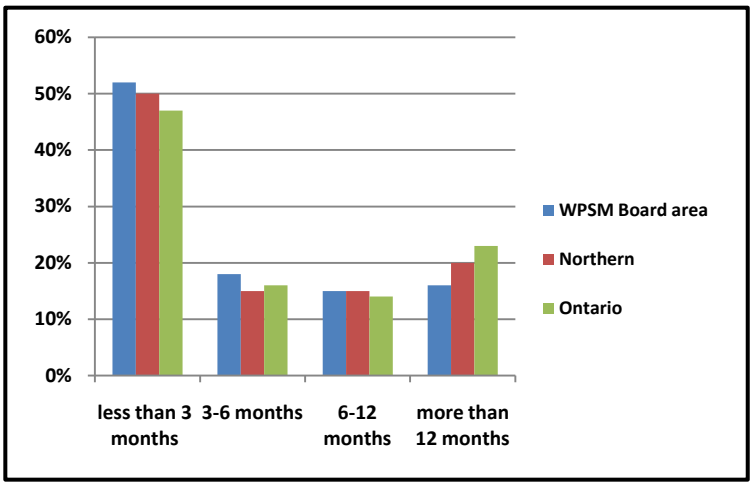
Source of income information is recorded at time of intake. There has been no change in the profile of *ES* clients by source of income for 2014-15 apart from a slight decline in the proportion of clients receiving EI (Employment Insurance). The largest source of income category is that of those reporting no source of income (which refers to personal income not household income). The category of "other" includes: Crown Ward; dependant of OW/ODSP; employed; and self-employed.



In a discussion with EO Service Providers, it appears that there is some discrepancy in how clients are categorized on CaMS for this data. This may need further exploration to ensure that all EO Service Providers are using the same definitions and are tracking this information consistently.

ES CLIENTS LENGTH OF TIME OUT OF EMPLOYMENT OR TRAINING:

The following graph illustrates how long an *ES* client was out of employment or out of training at the time of intake and compares this to northern Ontario and Ontario's figures.



By and large, the distribution of *ES* clients by length of time out of employment or training is much the same between the WPSM Board area, northern Ontario and the rest of the province and that *ES* client figures between this year and last year, shows virtually no change. Local EO Service Providers noted that recent university/college graduates generally make up the high proportion of those seeking services at less than 3 months of being out of employment or training. In some cases, some *ES* clients also wait until their EI benefits are about to expire before seeking services.

ES CLIENT OUTCOMES AT EXIT:

This chart indicates outcomes at exit for *ES* clients and compares outcomes between the WPSM Board area, northern Ontario and Ontario. The category "other" includes: *ES* clients who at exit are: independent; unemployed; unable to work; unknown; or volunteer.

The split in terms of outcomes is virtually identical across all three areas, with the WPSM Board area showing slightly higher numbers for training as an outcome. EO Service Providers have base targets for employment outcomes set by MTCU - the expectation is that roughly 70% of all *ES* clients become employed after receiving service.

Data also showed that 54% of *ES* clients became employed full time (25 plus hours/week); 15% employed part-time; and that 3% became self-employed, however EO Services Providers feel these numbers are even lower for the Espanola/Manitoulin area overall. Only 2% of *ES* clients found a more suitable job and 3% became employed in a professional occupation or trade.

ES CLIENTS BY LAY-OFF INDUSTRY AND EMPLOYMENT OUTCOMES:

MTCU provided a breakdown of industries that *ES* clients had been laid off from and their employment outcomes. In 2013-14, lay-off data was provided by 33% of *ES* clients and this year 53%. This appears largely due to how data was reported (using 2 digit NAICs codes vs. 4 digit). In 2014-15, the following industries accounted for various lay-offs in the WPSM Board area: *Accommodation & Food Services,* followed by *Retail 16Trade* and *Construction.* These same three industries, in addition to *Manufacturing* and *Administrative and Support,* accounted for most employment outcomes (for which there was far less data).

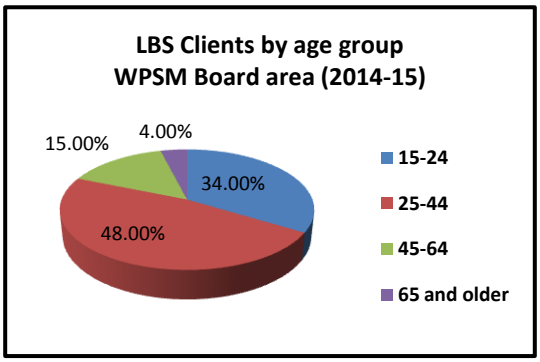
Top three occupations for lay-offs for this same time period were: *Service Support* (includes food counter attendants; cleaners), of which there were 326 (2nd highest in the North and 1st in the province); *Trades Helpers and Construction Labourers* of which there were 288 (1st in the North and 4th in the province); and *Service Representatives* (food and beverage servers; customer information), of which there were 203 (3rd in the North and 2nd in the province).

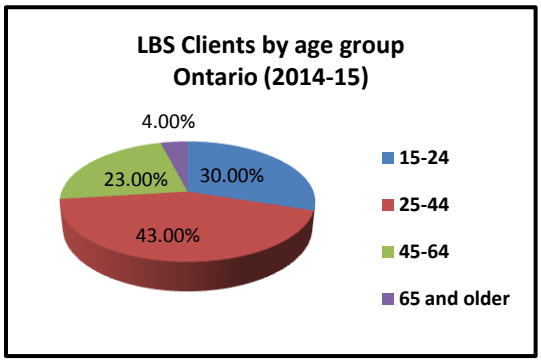
LITERACY AND BASIC SKILLS (LBS) CLIENT DATA

Literacy and Basic Skills[3] programs provide free training in reading and writing, math, and basic work skills to help clients reach their goals to upgrade their education or training, get a job, or become more independent. There are a number LBS services across the WPSM Board area and training is offered in various locations (such as school boards, community agencies and colleges) and in various ways (tutors, one-on-one, small groups, e-learning, etc.).

The total number of in-person learners for 2014-15 (both new and carried over from previous year) was 1,384 and the number of e-channel learners (both new and carried over from previous year) was 1,514 for a total of 2,898 learners. In Ontario, there were 38,102 in-person learners and 5,515 e-channel learners for a total of 43,617 learners.

Demographic data is only available for in-person learners. In the WPSM area, the majority of LBS clients continue to be in the 25-44 year old category which is the same in Ontario. The following pie charts illustrate the % breakdown by age of *LBS* clients. Interestingly however, EO Service Providers report that the oldest age groups in the outlying WPSM Board area (more rural to remote) tend to have the lowest literacy levels.



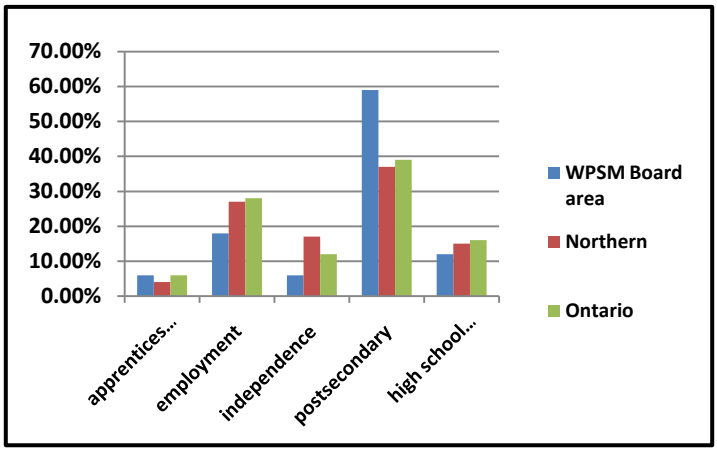


The majority of clients using LBS services tend to be women and in the WPSM board area, women make up 66% (N=1,900) of all *LBS* clients. EO Service Providers feel that this accurately reflects who they are providing

[3] *taken from MTCU website at: http://www.tcu.gov.on.ca/eng/apprentices/lbs.html*

LBS services to. *LBS* clients are asked at intake what their Learner Goal Path is, in other words why are they interested in LBS services. This chart examines the Learner's Goal Path at time of intake; however it is important to note that this may not be the outcome when a client exits LBS services.

In the WPSM Board area, clients use LBS services to a slightly lesser degree for employment reasons than those in northern Ontario and Ontario, but more so to obtain some form of postsecondary education. Currently, both local colleges conduct an assessment of mature students to ensure that they have the required prerequisites for the program they are pursuing which may account for this higher percentage. Overall however, these figures have remained relatively unchanged.



Although not directly related to *LBS* clients in the WPSM Board area, other reports such as the *Essential Skills Bulletin* (2014) based on an overview by Programme for the International Assessment of Adult Competencies (PIAAC) note that "Ontario may have a numeracy challenge." The findings of PISA (the Programme for International Student Assessment) are also reported in the *Essential Skills Bulletin* and "survey results show that numeracy skills among Ontario 15 year olds have been declining over the past nine years." So while *LBS* clients have remained relatively unchanged for the last two years, concerns regarding numeracy and literacy skills as identified and reported by various other sources may be pointing to a future problem that may also increase demand for LBS services.

SECOND CAREER (SC) CLIENT DATA

The Second Career[4] program provides laid-off workers with skills training and/or education to help them find jobs in high-demand occupations in Ontario. Second Career provides a grant to clients based on the needs of the client to help with tuition, books, transportation and basic living (receive an allowance).

In 2014-15, in the WPSM Board area, 383 clients were registered in Second Career and 9,271 were registered in Ontario. The majority of clients are under the age of 45 and in the WPSM Board area, 38% are female and 62% male. Table 16 illustrates how long clients have been out of employment/training which is one of the criteria for eligibility in this program.

TABLE 16 – LENGTH OF TIME OUT OF EMPLOYMENT/TRAINING FOR SECOND CAREER CLIENTS (2014-15)

LENGTH OF TIME	Number of Second Career Clients		
	WPSM Board area	Northern	Ontario
Less than 3 months	166	494	3,336
3-6 months	66	172	1.597
6-12 months	65	173	1,851
More than 12 months	55	122	2,058
Time out unknown	31	71	429
Total	383	1,032	9,271

This data seems to indicate that more *SC* clients in all three locations enter the program when they have been out of work for less than 3 months. All other categories, with the exception of "time out unknown" are reasonably similar in terms of *SC* client numbers. Recent graduates are not eligible for Second Career.

[4] *taken from MTCU website at: http://www.tcu.gov.on.ca/eng/secondcareer/whatitis.html)*

As noted, Second Career is focussed on high-demand occupations and the onus is on the client to provide proof of job opportunities that exist. Additionally, the client needs to go to where the program is being offered. This can be challenging as many programs only begin at the start of a school year and as a result, clients may need to leave their families for extended periods of time depending on the length, timing and location of the program.

According to EO Service Providers, some *SC* clients choose to enter programs that are shorter in duration such as AZ (truck driver) training simply to get training and a job. This is evident in the WPSM Board area as the top occupation chosen by *SC* clients continues to be: *Transport Truck Driver* followed by *Heavy Equipment Operator* and *Home Support Workers and Housekeepers*. Additionally, all training programs can be particularly challenging for those living in rural and remote areas and as a result, some high demand programs such as PSW are sometimes offered in local communities in order to maximize access and increase opportunity.

Second Career data for the WPSM Board area also indicates that 12 months after program completion, 172 *SC* clients were employed. However EO Service Providers expressed concern as it is very hard to follow up with *SC* clients a year after they have left the program. It is also not clear what occupations *SC* clients were hired in or what happened to those who did not find employment.

APPRENTICESHIPS CLIENT DATA

Various reports have provided mixed perspectives on projected skills shortages across Canada. The Canadian Chamber of Commerce's 2012 report *Top 10 Barriers to Competitiveness–Canada's Skills Crisis: What We Have Heard* highlighted an imminent skills crisis in Canada. However a TD economics report *Jobs in Canada – Where, What and For Whom?* criticized this notion but said there is some evidence of a mismatch in certain occupations and provinces/geographic regions (Burleton et al., October 2013). This is further supported by Rick Miner's (2014) *The Great Canadian Skills Mismatch - People without Jobs, Jobs without People and MORE.*

Although it is impossible to specify how a skills shortage/mismatch will impact on local industry, trade-related jobs are critical to the success of various industries. For example, in the report *2015 Survey of Ontario's ICI Construction Industry* (which includes industrial, commercial and institutional), 91% of contractors surveyed identified a shortage of skilled workers in northern Ontario and that the top 3 trade shortages are in the following trades: carpentry, electrician and plumber/steamfitter (Ontario Construction Secretariat, March 2015). In the WPSM Board area, the most popular/top four trades for new apprentice registrations are: *Electrician (Construction and Maintenance); Auto Service Technician; Heavy Duty Equipment Technician;* and *Power-line Technician*.

Despite local efforts to promote the trades, the Employment Ontario Apprenticeship data in Table 17 indicates a decline in the number of active apprentices from the previous year across all areas. Although it is not clear why this decline is so dramatic, several factors may be impacting here: regulatory changes; apprentice responsibility shifting from MTCU to the Ontario College of Trades (OCoT); OCoT's enforcement-based approach; and the difficulty an apprentice has finding an employer. Additionally, although this data is collected by the postal code of the employer who hired the apprentice (which may impact on number of apprentices who stay in the WPSM Board area), this does not hold much merit as the Ontario numbers have also declined.

TABLE 17 – NUMBER OF NEW REGISTRATIONS AND ACTIVE APPRENTICESHIPS 2013-14 & 2014-15

	WPSM Board area	Northern	Ontario
New 2013-14	815	2,871	27,959
New 2014-15	842	2,361	26,018
Active 2013-14	4,314	11,747	117,118
Active 2014-15	2,827	7,376	78,492

According to MTCU data, in the WPSM Board area, the average age of an apprentice at registration is 28 years of age which is an increase from 2013-14 where the average age was 25. Although it is hard to understand why the average age has increased, it may mean several things: those entering the trades go in after they have already been out in the workforce or attended postsecondary education or both; or it could be a sign of how difficult it is to secure an employer for the experiential portion of the apprenticeship. It would be interesting to see: the average age of apprenticeship completions; the average length of time spent in an apprenticeship; the number of new apprentices who go on to be a certified journeyperson; and the reasons why some don't continue.

EO Service Providers also commented that it is very difficult to meet the apprentice-journeyperson ratio in smaller, rural and/or remote areas of the province which will not only impact on number of apprentices who register, but on numbers who complete. According to a study by Lefebvre et al. (July 2012), they report that "the number of apprentice registrations across the country has increased" but that is not the case in Ontario according to Employment Ontario data. Lefebvre et al. also add that "completion rates are less remarkable" which is the case in Ontario. It is important to note that over the last year, MTCU has shifted their focus from apprentice registrations to completions.

RECOMMENDATIONS

Although EO Service Provider observations have been included with each program area, the following is a summary of themes/recommendations that emerged. Several are repeated from last year's report:

a) MTCU data should be provided by census area to truly reflect client profiles, demographics and outcomes for all program areas as urban census areas overshadow rural census areas. At the same time however, it continues to be important to maintain the integrity, privacy and confidentiality of the individual client and the EO Service Provider organization.

b) The age breakdown for all program areas needs to be changed to provide more accurate profiles of clients. Age breakdown suggested includes: 15-18; 19-29; 30-44; 45-65; and 65 plus.

c) Employment Ontario services should not be required to compete for funding as this discourages sharing of employer contacts, job postings, resources and databases. MTCU is currently embarking on an Employment and Training Service Integration process (ETSI) to increase networking, collaboration and a systems approach to improve services and client outcomes.

d) Better mechanisms need to be developed to capture all R & I clients as current numbers do not reflect the number of clients who use Employment Services; data should acknowledge that ALL individuals, whether they register as a client or simply come in for help on their resume, should be identified as "assisted" clients.

e) Challenges continue for clients who only need very specific short-term programs as many are not offered; this is further compounded for those living in rural areas.

f) Re-examine the "employed" threshold as the current definition considers clients employed full time at 25 plus hours per week, however the definition is not clear across all EO services.

g) In smaller rural communities, EO Service Providers have noticed an increase in number of individuals seeking Employment Services with multiple challenges including addiction and mental health issues. EO Service Providers stated that they feel ill-equipped or trained to deal with such complex cases and that they have no place to refer these clients to as services in their area are limited or not available. **This is an important issue that needs to be addressed.**

ACTION PLAN UPDATE

PRIORITY #1: support local labour market-related initiatives

STATUS & ACTIONS	LEAD & PARTNERS	TIMELINES	OUTCOMES
Support Social Planning Council's (SPC) Pathways to Employment Pilot Project			
ACTION: Social Planning Council Support SPC in efforts to build a "collective impact" backbone framework that addresses multiple socio-economic issues such as education, training, employment, etc.	**LEAD:** SPC	Delete this action	There have been no further developments or funding at this time to support this activity.
Contribute to Sudbury Chamber of Commerce's workforce-related taskforces and roundtable discussions			
ACTION: Sudbury Chamber of Commerce Continue to participate on workforce - related taskforces/roundtables established by the Chamber on current/emerging workforce issues.	**LEAD:** Chamber **PARTNERS:** WPSM; colleges; business partners; & others	Ongoing	Continue to participate on Ring of Fire Taskforce and other labour market related discussions.
Support Aboriginal workforce development initiatives			
ACTION: Aboriginal workforce development Support both on and off reserve workforce-related initiatives across the catchment area where appropriate.	**LEAD:** Various Aboriginal services and organizations **SUPPORT:** WPSM and AWIC	Ongoing and as requested	Assist where requested re: skills inventory, labour market research, industry profiles and workforce succession planning.
Introduce grade 9 & 10 girls to potential career opportunities			
ACTION: Women of the Future Support annual one day event to connect grade 9 & 10 girls with mentors and potential careers.	**PARTNERS:** various organizations including WPSM and local school boards	Annual one day event held every March	Event includes: exploration of careers in a variety of fields through mentoring, tours, inspirational talks and exposure to successful local women.
Support local employers re: workforce needs			
ACTION: LaCloche & Manitoulin Island Support development of local business resources and events targeting local employers.	**PARTNERS:** LAMBAC, Town of Espanola, local Employment Services, MSDSB, WPSM and others	Showcase at end of Sept. Ongoing and as requested	Contribute to LaCloche Foothills Business Resource and Showcase event and participate in planning of other employer-related events.
Contribute to future workforce needs/priorities - Greater Sudbury Economic Development Strategic Plan 2025			
ACTION: GSDC 2025 Participate in plan consultation where WPSM can assist and/or take the lead.	**LEAD:** GSDC **MULTIPLE PARTNERS:** based on objectives identified	Short & long term objectives	Clarity re: potential lead and/or support role of WPSM.

PRIORITY #2: promote current/forecasted in-demand skilled trades and professions

STATUS & ACTIONS	LEAD & PARTNERS	TIMELINES	OUTCOMES
Develop career resource information sheets on top occupations			
ACTION: Top occupations – career resource As a spin-off from identifying Sudbury's top 25 occupations, develop career resource information sheets for top 10 re: average wage, projected growth, training, etc.	**CO-LEADs:** WPSM in partnership with Employment Support Services, Greater Sudbury	Spring 2016	Information resources that will be widely disseminated and posted on WPSM website for those interested in these careers.
Support efforts to encourage employers to hire internationally trained workers			
ACTION: Internationally trained professionals Support work of PNN where appropriate.	**LEAD:** Professions North; Chamber of Commerce	Ongoing	Support initiatives as requested and continue to have PNN member on WPSM Board.
Support efforts to address projected shortages in the skilled trades			
ACTION: Women in skilled trades Support implementation of a) key logic model elements; b) summer skills camp for girls; and explore opportunity for a tradeswomen network	**LEAD:** WPSM **PARTNERS:** Tradeswomen; educators; industry; OYAP; colleges,	December 2015	Resource for employers produced and disseminated; successful skills summer camp for girls; funding explored for network.

ACTION: Video - experienced skilled trades opportunities Video complete, but due to mining industry downturn, release was delayed. Will continue to explore opportunities for public release.	**LEAD:** GSDC **PARTNERS:** WPSM; TBD	Video release TBD	Dissemination of video promoting the need for experienced skilled tradespersons based on mining HR study (websites and talent attraction events).
Cultivate growth of the cultural design industry			
ACTION: Design cluster Continue discussions to determine interest in increasing the cultural design industry network – cluster growth.	**LEAD:** WPSM **POTENTIAL PARTNERS:** GSDC; colleges; Cinefest, and arts industry leads	Ongoing	Database developed. Continue to explore workforce needs and growth opportunities.
Support efforts highlighting the value of a career in mining industry			
ACTION: Modern Mining & Technology Week (MMT) Support activities that provide students with experiential learning opportunities in mining.	**LEAD:** MMT **PARTNERS:** SAMSSA; Sudbury Construction Association; mining companies; Rainbow Board; university; etc.	Annual event each May	Successful implementation of Modern Mining and Technology Week; ongoing WPSM in-kind and financial support.

PRIORITY #3: support labour market research, information, profiles and forecasts

STATUS & ACTIONS	LEAD & PARTNERS	TIMELINES	OUTCOMES
Data consortium and local labour market web portal			
ACTION: Data consortium Continue to collaborate as one of the lead organizations in the development of the labour market data network and web portal and explore funding options for sustainability.	**CO-LEADS:** SPC; WPSM; INORD **POTENTIAL PARTNERS:** Government, GSDC; postsecondary institutions	Continuing	Enhanced web portal at INORD (Laurentian University); research needs discussed; new research reports uploaded; peer oversight provided; and funding secured.
Dissemination of occupation forecasting reports			
ACTION: Excellence in Manufacturing Consortium Keep abreast of and support the consortium's effort to gather and share real-time labour market data.	**LEAD:** Excellence in Manufacturing Consortium **SUPPORT:** Workforce Planning Ontario (WPO)	April 2016	A real-time labour market web portal that provides information on current and projected manufacturing positions that are available across the country.
ACTION: Forestry and Wood Manufacturing Workforce Planning Ontario (WPO) helped develop a video and resource material to promote jobs in forestry and wood manufacturing (18,000 new workers required by 2020 in Ontario).	**LEAD:** Ministry of Natural Resources & Forestry; WPO **SUPPORT:** WPSM and other local boards	December 2015	Dissemination of videos and resource materials to area school boards, colleges, EO service providers and WPSM led Education Coordinating Team.
Contribute to pan-northern Ontario immigrant retention research project			
ACTION: Immigrant retention research report Funding to support this research which will be based on the most current data available re: recruitment, retention and economic establishment of immigrants in northern Ontario (modelled after New Brunswick project).	**LEAD:** Far Northeast Training Board **PARTNERS:** North Bay Multi-cultural Centre; Northern Ontario Planning (NOP) Boards	April 2016	A report on immigrant recruitment, retention and economic establishment for the WPSM Board area. This will form part of a pan-northern report which will be disseminated.
Support research project to gather apprentice & journeyperson data			
ACTION: Apprentice and journeyperson data Create a trade-specific database of numbers of apprentices, journeypersons, and demographics for northern Ontario.	**LEAD:** Northwest Literacy **PARTNERS:** NOP, OCoT, MTCU (?)	April 2016	A trade-specific database to provide information on apprentices/journeypersons to assist with planning.
Support the Workforce Planning Ontario (WPO) network			
ACTION: Workforce Planning Ontario network Participate in provincial discussions re: provincial issues, challenges and policies that support workforce planning in Ontario. Bring northern/local perspective to the table.	**LEAD:** 26 local workforce planning boards across Ontario	Ongoing	Greater understanding of workforce issues across Ontario. Increased opportunity to champion key labour market strategies based on evidence.

PRIORITY #4: support alignment between training/education and industry need

STATUS & ACTIONS	LEAD & PARTNERS	TIMELINES	OUTCOMES
Support initiatives that promote experiential learning opportunities (apprenticeship, co-op, SHSMS, etc.)			
ACTION: Promoting the trades **A**ctivities will continue on an ongoing basis and will include: ads and stories in the *Student Living* Magazine and *Jobs of the Future* issue; efforts to engage more media; and supporting local initiatives such as the ICE Challenge, skilled trades competition, etc.	**CO-LEADS:** Varied depending on activity but includes; local school boards, WPSM; Education Coordinating Team; local media; employers; and others	Ongoing	Increased media and stakeholder attention to key issues impacting on youth employability: i.e. lack of basic math skills and what employers are looking for (*employerone* results); and support for initiatives that promote experiential learning.
Support connection between area education and training institutions and employers/industry need			
ACTION: Education Coordinating Team (ECT) Continue to chair a committee of all area school boards, post secondary institutions and specialized training and employment services to share information, network and collaborate on special projects.	**LEAD**: WPSM **COLLABORATORS:** school boards, post secondary institutions, specialized training and employment services and local unions	Ongoing monthly meetings	Increased understanding by ECT of the needs of employers in key sectors, training opportunities, recruitment strategies, etc. to help ECT member organizations better align education and training efforts with industry.
Support apprenticeship initiatives			
ACTION: Literacy Northwest initiative Where appropriate, support recommendations of pilot project aimed at addressing employer apprenticeship challenges.	**LEAD:** Literacy NW **COLLABORATION:** Colleges, employers, OYAP, Employment Services, WPSM, etc.	Completed December 2016	Shared contacts and participated in local event. As noted, currently leading the development of a brochure for employers re hiring apprentices.

SUMMARY COMMENTS

WHO SHOULD TRAIN OUR WORKFORCE?

Most businesses in the Sudbury and Manitoulin Districts fit into the small to medium-sized category. However, regardless of size, we are hearing the same thing: many employers expect and want fully trained, skilled and experienced workers. This is particularly concerning on several fronts. First: many employers don't provide the training needed for a potential candidate to gain the experience that they are looking for. Second: employers are requiring a high level of experience and education even for entry level positions. And third: employers are expecting that college/university graduates are already "ready-trained" for the workplace.

In *Moving Forward Together – an Employer Perspective on the Design of Skills Training Programs in Canada,* a report prepared by Holmes and Hjartarson (2014) for Essential Skills Ontario and the Ontario Chamber of Commerce, their research showed that little training is being done by small and medium-sized companies. They go further to suggest that employers need to be more engaged in building the skills of their workforce. Certain industry sectors have taken it upon themselves to provide training however many employers still don't. Employers often cite the following reasons for not undertaking training: cost; availability of training; loss of productivity time; and concerns about other employers "poaching" their trained employees.

As previously mentioned, all six northern Ontario workforce planning boards conducted an employer survey in 2014. For the WPSM Board area, employer respondents identified the following top three challenges when recruiting: not enough applicants; applicants not meeting qualification requirements; applicants not meeting work experience requirements. Additionally, when asked about necessary competencies they are looking for in current and future employees - guess what was number one? The number one top competency they are looking for is *work ethic*. In other words, will the employee show up to work on time? Are they dedicated? And are they dependable?

Some of these skills are not that easily taught as they are characteristics and qualities that the potential candidate brings. When this is combined with the experience and education that employers say that they need, it begs the question – whose job is it to train and provide experience to our current and future workforce with all of the skills that employers are looking for?

EDUCATION AND LABOUR MARKET NEEDS

To compound matters, other basic skills like literacy and numeracy are also falling behind and it has been reported that many students are not able to write properly or do simple math calculations. Currently, there is a debate on what kind of math skills should be taught to students in elementary and secondary school.

In Ontario, students are no longer being taught foundational math skills like adding, subtracting, division, multiplication, calculating ratios, etc., yet employers are still demanding this. Students are also allowed to bring their cell phones into class to do these previously learned mathematical skills, yet these same students are not allowed to bring cell phones onto many job sites, especially in the construction trades. If they are an apprentice, they risk being fired. Again, these are some of the skills that are being demanded by employers, but it appears that the education system and industry (employers) are not in sync with the same set of expectations.

This underscores an important theme we have discussed in previous reports: the "disconnect" between what the education system is teaching and the changing demands of the labour market. While it is well recognized that increased education increases job prospects and future potential salary, there seems to be a growing gap between employer needs/expectations vs. education system responsibilities/curriculum.

While there are many examples of successful matching, time after time, employers are voicing their concerns about the lack of skills and experience in prospective employees – whether for highly paid professional positions, through to lower paying entry level jobs; all of this circles back to the same questions - whose job is it to train our current and future workforce? and meet the changing needs of employers?

SHIFTING LABOUR MARKET TRENDS

This question only adds to the long list of other questions we have about our workforce: Do we have a skilled trade's shortage or a geographic mismatch? Who will replace older skilled workers when they retire and why are some choosing to stay or return to the workforce after retirement? Why are apprentices not completing their apprenticeships? Why are employers reluctant to take apprentices or train graduates? Why are businesses not thinking about workforce succession planning? Which employers/industries are hiring? Will technology and cheap offshore manufacturing continue to change the face of what were once good middle-income manufacturing jobs in the future?

According to author Kaylie Tiessen (May 2015), Ontario is experiencing a "seismic shift" in the labour market. Her research shows that in Ontario, in 2000, manufacturing jobs represented 18% of the labour market and by the end of 2013, only 11%. Additionally service-related jobs (healthcare, social services, etc.) and precarious work has increased from 73% to 79% during that same time. Often, these are minimum wage jobs with no guarantees of continued employment, benefits or pensions. The *Economic Policy Series* by the Canadian Chamber of Commerce (February 2014) also reports that 95% of net new jobs in Canada were part-time jobs. All of this contributes to what is known as the "middle-class squeeze" as those good paying full-time jobs are gone.

Again, most of this can be summed up in the following themes: What jobs will exist in the future? How do we connect education/training with real labour market needs/trends? Where will our future workforce come from? Who will train them? And how do we engage everyone who wants to work?

ADDRESSING THE HARD QUESTIONS

So here we are...left with many questions that are difficult to answer. These are complex questions that need the commitment of local, regional and provincial partners in industry, government, education, training and employment, research, economic development, labour, and others to come together and work together. It requires an honest, open and frank dialogue about the issues and a willingness to address some of these systemic, core challenges with well conceived, comprehensive and evidence-based solutions - solutions that ensure: that the education system is meeting the needs of the changing labour market; that employers can prosper and expand their workforce; where business investment increases; where jobs stay in the region; and where everyone who wants and is able to work, can find a good job.

PARTICIPATING STAKEHOLDERS & RESOURCES

GOVERNMENT:
Employment Ontario (MTCU)
City of Greater Sudbury
Ministry of Agriculture, Food and Rural Affairs
Ministry of Labour
Ministry of Natural Resources & Forestry
Ministry of Northern Development & Mines

LABOUR:
Various unions/locals

ASSOCIATIONS:
Excellence in Manufacturing Consortium
Ontario Construction Secretariat
Provincial Women in Trades Network
SAMSSA
Sudbury Construction Association

ABORIGINAL ORGANIZATIONS:
First Nations - Economic development leads
Gezhtoojig Employment & Training
Kenjgewin Teg Educational Institute
Mnidoo Mnising Training Alliance
N'Swakamok Native Friendship Centre
North Shore Tribal Council
Waubetek

TRAINING, EDUCATION AND EMPLOYMENT:
Cambrian College
Collège Boréal
Conseil scolaire catholique du Nouvel-Ontario
Conseil scolaire public du Grand Nord de l'Ontario
Employment Options/Emploi
Employment Support Services, Greater Sudbury
Laurentian University
March of Dimes
Manitoulin – Sudbury District Services Board
Northwest Literacy Network
Rainbow District School Board
Sudbury Catholic District School Board
Sudbury Vocational Resource Centre
YMCA Employment Services

ECONOMIC DEVELOPMENT/BUSINESS:
Greater Sudbury Chamber of Commerce
Greater Sudbury Development Corporation
Institute for Northern Ontario Research & Development (INORD)
LaCloche Foothills Chamber of Commerce
LAMBAC
Regional Business Centre - Greater Sudbury
Sudbury East Board of Trade
Town of Espanola

HEALTH & SOCIAL SERVICES:
Health Sciences North
Social Planning Council of Sudbury

IMMIGRATION:
Local Immigration Partnership
Professions North/Nord
YMCA Sudbury Newcomer Services

INDUSTRY/BUSINESS SECTORS:
Construction
Employers targeted for *2014 employerone* survey
Finance
Health
Hospitality & Tourism
Independent business owners & contractors
Manufacturing
Mining companies
Mining supply services
Real Estate
Retail
Service industry

DISABILITIES:
Accessibility Service, Laurentian University
Independent Living Sudbury Manitoulin
March of Dimes

MEDIA:
CBC
CTV
Northern Life
Northern Ontario Business
Sudbury Star

TOURISM:
Tourism Northern Ontario (TNO)

COMMONLY USED TERMS

ASETS:	Aboriginal Skills and Employment Strategy
CMA:	Census Metropolitan Area
EO:	Employment Ontario
ES:	Employment Services
ETSI:	Employment and Training Services Integration
GSDC:	Greater Sudbury Development Corporation
INORD:	Institute for Northern Ontario Research & Development
KTEI:	Kenjgewin Teg Educational Institute
LAMBAC:	LaCloche Manitoulin Business Assistance Corporation
LBS:	Literacy and Basic Skills
LHIN:	Local Health Integration Network
LIP:	Local Immigration Partnership
LLMP:	Local Labour Market Plan
LMI:	Labour Market Indicators
MNDM:	Ministry of Northern Development & Mines
MOHLTC:	Ontario Ministry of Health & Long Term Care
MSDSB:	Manitoulin Sudbury District Services Board
MTCU:	Ontario Ministry of Training, Colleges and Universities
NAICS:	North American Industry Classification System
NOC:	National Occupational Classification
NOCA:	Northeastern Ontario Construction Association
NOSM:	Northern Ontario School of Medicine
PNN:	Professions North/Nord
OMAFRA:	Ontario Ministry of Agriculture, Food and Rural Affairs
OYAP:	Ontario Youth Apprenticeship Program
R & I	Resource and Information (unassisted) clients
SAMSSA:	Northern Ontario Mining Supply and Services Association
SC:	Second Career
SHSM:	Specialist High Skills Major
SME:	Small and Medium Enterprises
SPC:	Social Planning Council
TNO:	Tourism Northern Ontario
WPO:	Workforce Planning Ontario
WPSM:	Workforce Planning for Sudbury & Manitoulin

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