

Building a Superior Workforce: 2009 – 2012 LABOUR MARKET ACTION PLAN: 2011 UPDATE



North Superior
Workforce Planning Board

Limitations:

The North Superior Workforce Planning Board recognizes the potential limitation of this document and will continue to seek out information in areas that require further analysis and action. The North Superior Workforce Planning Board assumes no responsibility to the user for the consequences of any errors or omissions.

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EMPLOYMENT ONTARIO

North Superior Workforce Planning Board gratefully acknowledges the continued support of the Ministry of Training, Colleges and Universities for this new approach to labour market planning.



North Superior

Workforce Planning Board

Vision:

Our human resource pool will be strategically aligned, competitively positioned and progressively developed to meet future social and economic demands across Northwestern Ontario.

Mission:

Connecting community partners to improve the quality of life in our communities through workforce development.

The North Superior Workforce Planning Board will:

- Build a strategic workforce readiness plan
- Create a dynamic, responsive process to satisfy current needs and prepare people for emerging labour market opportunities within a global economy
- Leverage community alliances to maximize labour market capacity and competitiveness

Mandate:

Leading in the creation of innovative labour market solutions by:

- Providing authoritative and evidence-based research
- Identifying employment trends
- Targeting workforce opportunities
- Initiating workforce development strategies

About the North Superior Workforce Planning Board

The North Superior Workforce Planning Board (NSWPB) is one of twenty-five Workforce Planning Board zones across Ontario, mandated through the Ministry of Training, Colleges and Universities to identify, assess and prioritize the skills and knowledge needs of community, employers and individual participants/learners in the local labour market through a collaborative, local labour market planning process.

An active and broadly-based volunteer Board of Directors representing Business, Labour, Women, Francophones, Aboriginal People, Cultural Diversity, Persons with Disabilities and Educators/Trainers governs its affairs. First established in 1996, NSWPB is recognized by community, economic and municipal leaders as a “partner of choice” in the identification and implementation of local solutions to local labour market issues.



 North Superior Workforce Planning Board Area



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EXECUTIVE SUMMARY: 2011 PLAN UPDATE



Executive Summary: 2011 Plan Update

In 2009, the North Superior Workforce Planning Board (NSWPB) released “Building a Superior Workforce: 2009-2012 Labour Market Action Plan.” This multi-year, community-based plan outlined a number of key themes and strategic training and education actions to help better position our area in the new “war for talent,” as has been described by many as the new battleground for business in the 21st century economy.

This Plan provided the strategic direction to help address shorter-term labour market adjustment needs, while laying the groundwork to position our region to leverage labour market opportunities in the future. Two years later, that future is now emerging – a future that reflects the resiliency of our region and the recovery opportunities of our shifting employment landscape.

The following “2011 Labour Market Action Plan Update” summarizes the specific actions initiated in 2009-10, adjustments made to accommodate changing circumstances, and the significant achievements made in responding to priorities.

Grounded in current labour market information, local intelligence, and community consultation, the following updated Plan incorporates a number of new strategic actions to advance labour market recovery over the 2011-12 years. These are boldly based on the speed and magnitude of the mining sector as a major economic driver in the region. These remain true to the five principal themes adopted in “Building a Superior Workforce: 2009-2012 Labour Market Action Plan” which address the most pressing challenges and promising opportunities to affect change for area workers, families and communities.

Diversify – Accelerate Value-Added & Knowledge Economy

Expand – Align Education & Training with Changing Skill Requirements

Attract – Advance Labour Supply through Attraction & Development Strategies

Retain – Enhance Worker Adjustment & Transition

Invest – In Aboriginal Economic and Employment Strategies

This Plan was crafted and has been successfully implemented with the extensive participation of community partners. It has and will continue to require flexibility, collaboration and new community synergies. It has and will continue to contribute to our regional renewal. The first steps of the 2009-12 Plan have been taken, and as a community, we will continue to monitor progress and adjust to change that builds strong skills...for tomorrow's demands.

If you want 1 year of prosperity, grow grain.

If you want 10 years of prosperity, grow trees.

If you want 100 years of prosperity, grow people.

Chinese Proverb

CHANGING ECONOMIC LANDSCAPE: RESILIENCE & RECOVERY



Northwestern Ontario's Evolving Economic Landscape: Resilience and Recovery

Prepared by Dr. Livio Di Matteo for the North Superior Workforce Planning Board

After a period of unprecedented change¹ and adjustment to its traditional economic sectors², the economy of Northwestern Ontario has responded with a surprising amount of economic resilience that is providing the foundation for long-term recovery. According to the Stockholm Resilience Center, the concept of resilience refers to the capacity of a social-ecological system to withstand change from various types of shock and to then renew itself afterwards.³ In other words, if a system is resilient, it can deal with change. The forest sector crisis in Northwestern Ontario was a major economic shock to the region's economy that resulted in massive employment losses, and yet if one looks at the region's economy and especially its major centre – Thunder Bay – one cannot help but notice the resilience of the economy. After four years of consecutive decline in GDP, Thunder Bay's economy grew by 0.6 per cent in 2010 and is projected to grow by 1.4 per cent in 2011, which represents the largest increase since 2000.⁴

As it was reported in the North Superior Workforce Planning Board's (NSWPB) local labour market report, "Building a Superior Workforce: 2009-2012 Labour Market Action Plan," Northwestern Ontario's economy is transitioning to a value-added knowledge culture that generates high-end products and services based on the traditional resource sector and transportation activities, as well as in the new areas of health research, education and the bio-economy. This transition has some particularly "shining examples" in Thunder Bay within the health sciences sector.⁵ The knowledge economy spans across all economic sectors, as the application of innovation and technology is also relevant to traditional sectors such as retail and service, forestry, manufacturing and mining as well as to new emerging economic activities in areas such as biotechnology, communications, and waste management.

The features of resilience and recovery can be documented via a variety of demographic and economic indicators. In terms of employment, after the steep declines of the first decade of the 21st century, employment levels in the region as a whole have stabilized and in some cases have started to recover. For Northwestern Ontario, from a peak monthly average of 90,400 jobs in 2003, employment fell to 75,700 by 2009 but in 2010 grew to 77,200. Meanwhile for Thunder Bay, from a peak average monthly employment of 65,300 in 2003, average monthly employment fell to 60,000 in 2009 and has remained approximately at that level for 2010. However, according to the Conference Board of Canada, employment in Thunder Bay is expected to rise by 2 percent in 2011, the first real increase in four years.⁶ These employment figures suggest that the period of job losses is over and that in Northwestern Ontario as a whole, a recovery in employment has begun.

In terms of demographics, between 2001 and 2006, the population of Northwestern Ontario actually rose by one-tenth of one percent – from 234,711 to 235,046.⁷ Within the Northwest region, the population of Kenora District rose, thereby compensating for slight declines in Thunder Bay District and Rainy River District. Indeed, recent trends suggest that long-term population may not decline. While Northwestern Ontario's population has been aging and there was a population decline during the 1990s, that situation can be expected to start to reverse itself in the near future due to the rapid increase in the Aboriginal population. Between 2001 and 2006, the Aboriginal population during this period grew by 21.5 percent though the non-Aboriginal population declined by 4.3 percent. On an average annual basis, the Aboriginal population grew at 4.3 percent per year

1. This change was particularly acute in the forest products sector where 19 forest operating mills employing nearly 10,000 forest sector workers were reduced to six, with over two-thirds of the employment gone. (Ontario Forestry Coalition, Report to the Thunder Bay District Municipal League, No Date.)
The deterioration of forestry markets also decimated the local manufacturing sector, where the estimated 2008 output was approximately half its level in 2000. (The Conference Board of Canada, Metropolitan Outlook 2, Winter 2009 & Winter 2011)
It should also be noted that after the major declines, the forestry sector appears to have stabilized and there have been pulp mill re-openings over the last year both in Sault Ste. Marie's St. Mary's Mill and Terrace Bay's Terrace Bay Pulp.
2. Northwestern Ontario and Thunder Bay's traditional economic pillars have been transportation, natural resources and government. (L. Di Matteo, "The Economic Development of the Lakehead During the Wheat Boom Era: 1900-1914")
3. See www.stockholmresilience.org.
4. See The Conference Board of Canada, Metropolitan Outlook 2, Winter 2009 & Winter 2011.
5. See the recently released study commissioned by the North Superior Workforce Planning Board and Employment Ontario "Transitioning Thunder Bay to a Knowledge Based Economy," 2010.
6. See The Conference Board of Canada, Metropolitan Outlook 2, Winter 2009 & Winter 2011
7. Statistics Canada Census, 2006.

while the non-Aboriginal population declined at an annual rate of 0.9 percent per year. Population forecasts that predict declines in Northwestern Ontario and Thunder Bay District need to take these differential growth rates across these population subgroups into account. If one applied these differential growth rates to the Aboriginal and non-Aboriginal population, one could see Northwestern Ontario's population reach 249,964 by 2021.

Resilience is particularly evident in the Thunder Bay area. Despite the fact that over the last decade three of its four pulp mills have closed with attendant job losses and GDP declines, the economy of Thunder Bay has been remarkably robust as a number of indicators demonstrate. For example:

- a. Building permits in Thunder Bay over the period 1995 to 2010 have grown with the total value of building permits in 2010 alone representing an increase of 112 percent over 2009.⁸
- b. Housing prices in Thunder Bay are also very healthy and have been on a pronounced upward trend despite the debut of the forest sector crisis. Since 2003, the average MLS housing price in Thunder Bay has risen from \$111,927 to \$153,800 in 2010 – an increase of 37 percent.⁹
- c. Another robust indicator is the passenger volume of the Thunder Bay International Airport, which is the regional airport and therefore services all of Northwestern Ontario. Passenger volumes have increased dramatically over the last decade and exhibit a pronounced upward trend. Since 1998, passenger volumes have increased by 30 percent¹⁰ and indicate that despite the forest sector downturn there is still growing demand for air travel to and from the region.

The resilient economy in Northwest Ontario is being driven by three economic engines: a) the continued transition towards a knowledge-based economy in the region; b) the expenditure on public sector infrastructure; and c) the growth and development of the mining sector in the region.

- a. The knowledge economy in Northwestern Ontario is spearheaded by the development of the Thunder Bay Regional Health Sciences Centre (TBRHSC), the Northern Ontario School of Medicine (NOSM) and the research work of the Thunder Bay Regional Research Institute (TBRRI). The TBRHSC employs 2,500 people and has an annual budget of \$280 million. In addition, the TBRRI is recruiting scientists from around the world to conduct work in the areas of molecular medicine and imaging systems and new medical research-associated private sector companies are being spawned such as Sentinelle and Tornado Medical Systems.

The other key blocks of the regional knowledge sector economy include Lakehead University with a total employment (full and part-time) of 2,000 and an annual operating budget of approximately \$100 million, and Confederation College with 760 employees (full and part-time) and an annual operating budget of almost \$70 million. In addition, the region's manufacturers such as Bombardier and GRK Fasteners also use knowledge intensive and skilled workers and have also seen growth in their activity. As well, there is the emerging forest bio-economy sector in which substantial investments are already being made by both the public and private sectors.

- b. With respect to public sector infrastructure, the region has recently seen millions of dollars in provincial road construction and improvements as part of a planned \$273 million investment in regional highways. There are 32 projects in Northwestern Ontario nearing completion involving 494 kilometres of highway and nine bridges, which have created 1,900 construction related jobs.¹¹ In the Thunder Bay region, there is a waterfront development project underway as well as substantial recent investments in roads and bridges, a new library, trail development, and recent improvements to the Bare Point Water Treatment Plant.
- c. Finally, there is activity in the regional mining sector as well as the projected developments in the Ring of Fire. Rainy River Resources recently announced that they are opening a new gold district about 25 kilometres north of Emo that could be in production by 2014.¹² In the James Bay Lowlands, home of

8. The value of permits was \$71.3 million in 2009 and \$151.3 million in 2010. Thunder Bay & Planning Building Division Updated: January 2011 & Thunder Bay Community Economic Development Commission – Thunder Bay Construction (December 2010).

9. See Canada Mortgage and Housing, Housing Market Information, <https://www03.cmhc-schl.gc.ca/catalog/productList.cfm?cat=48&lang=en&fr=1299169526890>

10. Annual Report 2009, Thunder Bay International Airports Authority.

11. See <http://news.ontario.ca/mndmf/en/2010/10/highway-improvements-continue-in-northwestern-ontario.html>.

Ontario's so called "Ring of Fire," there are over 100 mining companies with holdings. The entire area north of 50 is an untapped region of forest, mineral and hydroelectric power wealth whose development will require the erection of roads, communications infrastructure and power transmission lines. As well, there will be opportunities for value-added products from both the mining sector that could generate opportunities for manufacturing, and secondary processing, both in Northern Ontario and the south's industrial heartland.

Currently, mining in Northwestern Ontario directly employs nearly 2,000 people with a payroll of \$142 million annually.¹³ There are currently seven metal mines and one diamond mine operating in Northwestern Ontario.¹⁴ In general, the combined economic benefits of a single "representative mine," as documented by University of Toronto economists Peter Dungan and Steve Murphy, are large. In its opening phase, a new mine generates almost 2,000 jobs annually to Ontario and adds approximately \$280 million to GDP and approximately 65 percent of the jobs are local or in the region where the mine is located. Once the mine is producing, about 1,500 jobs are created annually in the local region.¹⁵

In light of this analysis, the potential of the Ring of Fire is enormous given its potential supplies of nickel, copper, zinc, gold, chromite and palladium. Toronto-based Noront Resources has discovered a nickel-copper deposit in the McFauld's Lake area. Tentative plans by Cleveland-based iron ore producer Cliffs Natural Resources for the chromite deposit¹⁶ in the Ring of Fire call for a \$1.3 billion investment including an ore concentrator, ferrochrome processing facility and a \$600 million 350 km rail line into the north from Nakina.¹⁷ The economic impact of just two new mines in the region could be enormous, sparking an economic boom in Northwestern Ontario and its major service centre of Thunder Bay. At the same time, there are challenges in developing the mining frontier given access and infrastructure needs for the region, as well as the cost of electricity rates given that value-added activities in the mining sector are energy intensive. Cliffs Natural Resources in particular recently indicated it was concerned about the price of electricity in the context of its future development plans.¹⁸

Resilience and recovery in Northwestern Ontario is also being driven by an engaged and focused advocacy, providing a persistent and persevering force for economic recovery. A recent example of this is the report released in February 2008 by Dr. Robert Rosehart, commissioned by the Government of Ontario, entitled, "*Northwestern Ontario: Preparing for Change – Northwestern Ontario Economic Facilitator Report*". This report captured input from over 120 meetings in 16 municipalities and from significant dialogue with Aboriginal leaders. It identified initiatives to rebuild a prosperous economy and help inspire a new generation of growth.¹⁹ In February 2009, the Minister of Northern Development and Mines, Thunder Bay-Superior North MPP, the Honourable Michael Gravelle and the Minister of Energy and Infrastructure, the Honourable George Smitherman, following a series of northern engagement meetings, hosted an economic conference in Thunder Bay called the *ThinkNorth Summit*.

In 2006, the North Superior Training Board [the Board changed its name to the North Superior Workforce Planning Board in 2009 in order to more accurately reflect the scope of work it undertakes], commissioned Dr. Livio Di Matteo, Lakehead University, to prepare a report outlining strategies to assist Northwestern Ontario

12. Ian Ross, "Raw and untapped: Rainy River Resources opening new gold district," Northern Ontario Business, February 2011.

13. Ontario Mining Association (2009: 9).

14. These are: Musselwhite Mine; Lac des Iles Mine; Campbell Red Lake Mine; Williams Mine; David Bell Mine; Island Gold; Eagle River Mine and Victor Mine.

15. Dungan and Murphy, (2007).

16. Chromite is used in the production of stainless steel.

17. According to a report in the Montreal Gazette, (February 4, 2011): "Cleveland-based Cliffs Natural Resources Inc., an international producer of iron ore, coal and other resources, is taking a key step toward development of Black Thor, one of three chromite deposits it owns in the "Ring of Fire" region of northern Ontario. Cliffs said Friday the project's ferrochrome production plant, requiring 300MW of electric power, will probably be built in Sudbury's nickel mining centre, though Timmins, Thunder Bay and Greenstone are not ruled out. The company is continuing talks with those municipalities. The pre-feasibility study for the chromite project, including openpit mine, nearby concentrator, infrastructure and ferrochrome plant, is due this September, followed by the full feasibility study by late 2012." "Assuming both are favourable, we expect to start production in 2015," said Bill Boor, president of Cliffs' ferroalloys division." Read more: <http://www.montrealgazette.com/Cliffs+Natural+Resources+develop+Ring+Fire+deposits/4226220/story.html#ixzz1EW406BCA>

18. Kate Maclaren (2011). <http://www.timminspress.com/ArticleDisplay.aspx?e=2963681>

19. In this report, Dr. Rosehart described Northwestern Ontario's demographic, economic and environmental future as "out-of-step" with the rest of the province and that, "standard programs and approaches of government are not going to offset the significant changes that are coming." (Rosehart, Dr. Robert G. *Northwestern Ontario: Preparing for Change. Northwestern Ontario Economic Facilitator Report*, Ministry of Northern Development and Mines. (February 2008), 1).

in making the transition to the knowledge economy. This report recommended that consideration be given to creating a Northwestern Ontario Research Institute to analyze business, scientific, economic and social issues and generate information and advice that could be applied to the region's economy. On January 6, 2007, under the banner of "Forging the Future, an Economic Vision for Northwestern Ontario," the Regional Recovery Committee (the forerunner of Common Voice Northwest) also included a recommendation for the creation of a Northwestern Ontario Policy Research Institute based on the NSTB report.

The Local Board then commissioned Dr. Di Matteo to further explore this recommendation and in 2007 the Board released "A Policy Institute for Northwestern Ontario: Need, Models and Structure." This report included a recommendation that an implementation committee consisting of key regional partners be struck to bring about the creation of the Policy Institute and this was done. Dr. Robert Rosehart's February 2008 *Northwestern Ontario: Preparing for Change – Northwestern Ontario Economic Facilitator Report* also supported the creation of a Policy Institute, suggesting that opportunities existed to learn from other jurisdictions in crafting a Northwestern Ontario Policy Institute to help steer the regeneration of our economic and employment future. Common Voice Northwest (CVNW), Northwestern Ontario Municipal Association (NOMA), and the Northwestern Ontario Associated Chambers of Commerce (NOACC) have also endorsed the creation of a Policy Institute and have requested that the Northern Ontario Growth Plan be amended to include the establishment of a Northern Ontario Public Policy Institute, in partnership with universities, colleges, Aboriginal organizations, regional, and community stakeholders to focus on Pan-Northern public policy issues.

The March 4, 2011 release of the Northern Growth Plan included the announcement of a Northern Policy Institute with \$5 million in funding from the Northern Ontario Heritage Fund Corporation. This support will better position Northern Ontario to fully participate in the changing provincial, national and global economy by conducting independent, forward-looking research on business, economic and social issues for Northern Ontarians and help develop integrated policies to support workers, employers and communities. The Northern Policy Institute will function as an independent, not-for-profit corporation that will play a key role in implementing and monitoring the Growth Plan for Northern Ontario and provide research with a focus on Pan-Northern public policy issues.

These and other recent studies commissioned by the North Superior Workforce Planning Board on graduate retention and transitioning to a knowledge economy represent continued policy work and development on finding ways to continue economic progress and recovery.²⁰ Other initiatives to transition the economy of the North include the Northern Development Councils' (NDC) recommendations on Growing and Strengthening Northern Business; various sectoral studies, the Forest Sector Prosperity Fund; and numerous local/regional initiatives such as Common Voice Northwest. As well, The Thunder Bay Community Economic Development Commission (CEDC) is focusing on initiatives which will harness the region's financial and intellectual resources to create unified approaches and strategies for economic development. Community Futures Development Corporations (CFDCs) and municipalities across the region are developing innovative strategic community plans and projects to strengthen and diversify their economies. Meanwhile, labour groups across the region continue their efforts to get governments to improve economic stabilizers such as social assistance and Employment Insurance and to improve re-training funding opportunities for laid-off workers in transition.

20. See North Superior Workforce Planning Board's *Graduate Retention and the Economy of Northwestern Ontario* released in November 2010 and *Transitioning Thunder Bay to a Knowledge-Based Economy* released in December 2010.

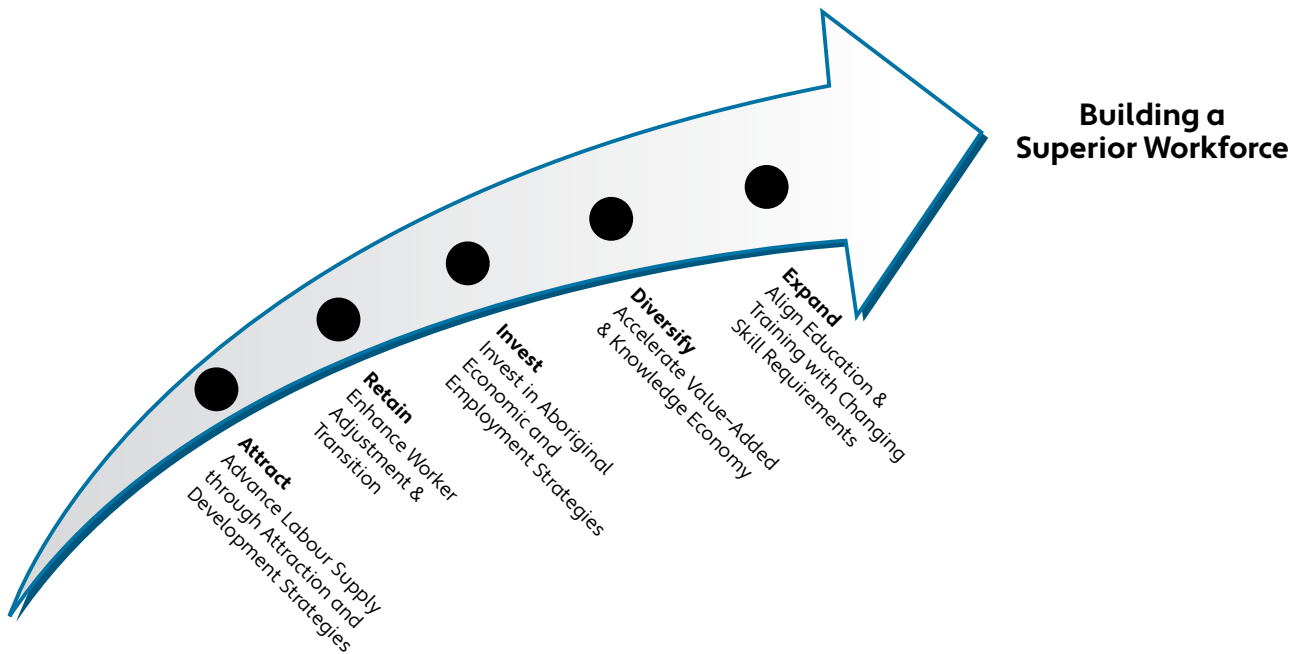
COMMUNITY CONSULTATION AND ACTION PLANNING PROCESS 2010-2011 UPDATE



Community Consultation and Action Planning Process – 2009-2011 Update

“Building a Superior Workforce: 2009-2012 Labour Market Action Plan” was released in the Fall of 2009. Since then our work to advance strategic actions, expand community dialogue and be a conduit for relevant, timely, and localized Labour Market Information has remained a high priority. What has been confirmed over the past 18 months is that community stakeholders still agree that the five (5) strategic directions (below) remain relevant to guiding labour market development action plans.

This 2011 formal update to the “Building a Superior Workforce: 2009-2012 Labour Market Action Plan” maintains the five principal themes and strategic priorities. The Diversify, Expand, Attract, Retain and Invest models present the most pressing challenges and promising opportunities to affect change for area employers, workers, families, and communities.



What has changed since the 2009 report is that the economy is gaining momentum. It is showing resiliency and recovery. The devastating impact of the forestry decline is being mitigated by the growing opportunities in current mining sector activities and the future potential of the Ring of Fire, combined with continuing growth in health and related sectors. This shift is changing the dynamics of the labour market. In response, the implementation of the Plan has been adjusted to ensure the path taken is the right one to respond effectively to shifting regional labour force development needs.

A 360° consultation program has been conducted as part of this 2010-2011 Plan update process, including:

- Research Scans – reports, studies and area economic strategic plans are continuously reviewed. This is done to ensure the Local Labour Market Plan Update is not developed in isolation, but within the context of how other plans capture and define area economic and employment development opportunities and challenges.
- Local Labour Market Information – Labour Force Surveys; 2006 Census; purchase of both 2006 custom data sets and specialized (2003-2010 comparative) tabulations for the region from Taxfiler and Canadian Business Patterns (Statistics Canada) sources were secured; including retaining expertise to provide pertinent statistical analysis and help “tell our story.”

- c. Key Informant Intelligence – recognizing the knowledge and “on the ground” experience of key players in our labour market, a series of interviews were held with sector/business leaders, labour, Presidents of both Lakehead University and Confederation College, employment and training service providers, economic development managers, Aboriginal and Francophone organizations, etc.
- d. Mining Sector expertise – recognizing the current and proposed impact of this sector to the economic and employment health of Northern Ontario, over forty (40) mining sector consultations were carried out with active mines, mining supply, and exploration companies to assess existing employer interest and commitment to working in a coordinated effort to develop an upside mining and mining sector labour supply-demand strategy.
- e. Community Consultations – over 2,000 kms were travelled to seven municipalities within the District of Thunder Bay in order to hear from individuals, businesses and organizations across the region. These consultations provided municipal, business and community representatives’ input on both localized issues and regional labour market perspectives.
- f. Listening – attending numerous area economic, industry, education/training and community meetings, events, sector specific conferences, etc. – as a participant rather than in a facilitator role – provided valuable insight into what issues are facing different communities within our region.
- g. Inter-governmental consultation – all levels of government have employment and training-related programs and services. As partners in advancing our region’s labour market, the community employment and training inter-governmental committee continues to provide local intelligence from their respective roles, sharing information and contributing to the update of this Local Plan.
- h. Voices from Events – gathered feedback from hundreds of attendees at events organized by NSWPB. For example, at the “Older Worker Forum” held in November 2010, delegates shared invaluable insights into the employment challenges faced by older workers – employment counselors took away several recommendations for implementation. At the Dr. Rick Miner event “Preparing Our Future Employees Today for the Jobs of Tomorrow!” held in January 2011, those in attendance provided feedback on types of initiatives needed to help employees either improve their skills or learn new skills.

When preparing the “Building a Superior Workforce: 2009-2012 Labour Market Action Plan,” much of what we heard through the planning process was synthesized and incorporated into the Plan. As it was then, care has also been taken through the recent process to capture the input and perspectives related to specific labour market challenges as they impact under-represented groups and other labour market stakeholders. The following summarizes many of these recurring comments.

Women: PARO Centre for Women’s Enterprise has increased its impact by deepening its reach to diverse populations. It sees itself as helping all women – Aboriginals, Francophones, multicultural, etc. In June 2011, PARO will host a conference on the theme “Business with the Arts” in which women involved in the arts—from music to visual—will be encouraged to become more entrepreneurial. The NSWPB’s Women’s Reference Group has also made one of its goals to assist with Aboriginal women from northern communities to transition to life in the city. Accordingly, representatives from the Women’s Reference Group serve on the committee of the Urban Aboriginal Strategy’s Employment and Training Action Circle.

Francophones: Association des Francophones du Nord-Ouest de l’Ontario (AFNOO) has adopted a new vision and mission as well as a 5-year strategic plan for 2009-2014 which will guide and direct their actions. With this new form of governance in place, AFNOO will continue to advance actions to respond to the needs of the Francophone population across Northwestern Ontario.

Persons with Disabilities: Persons with Disabilities continue to face obstacles to labour market participation. Raising awareness and dispelling misconceptions about Persons with Disabilities is an important goal of local organizations working with this under-represented group in the workforce. Further, ensuring students with disabilities are better able and equipped to participate in the workforce is a specific ongoing concern as well.

Aboriginal People: The Aboriginal population remains under-represented in the local labour market. The Urban Aboriginal Strategy Employment and Training Action Circle (*Anishnawbe Anokii-win* which translates to “Native work and training that is being done in our whole community”) meets bi-monthly and currently serves as an information sharing consortium for those organizations and employers concerned with Aboriginal workforce participation. One planned action in the coming year by the Aboriginal Employment Resource Committee (AERC) is to host an Employers’ Dinner. The objective is to profile the Aboriginal population as a ready labour supply and discuss how to assist with recruiting, training, and retaining Aboriginal employees.

Immigrants: Immigration continues to be an important labour supply strategy for the region. The Immigration Committee, facilitated by NSWPB and Thunder Bay Multicultural Association, continues to meet on a regular basis. The recent link-up between NSWPB’s Thunder Bay District’s Labour Market Information Portal and the Northwestern Ontario Immigration Portal will fill a labour market information gap to aid in immigrant attraction strategies.

Essential Skills and Literacy: Literacy and Basic Skills remains a foundational component to effective labour market functioning. Literacy Northwest and the seventeen (17) literacy and basic skills delivery agencies continue to actively promote literacy objectives with individuals and employers. An example of this is the 2011 Literacy Northwest “Apprenticeship Support Tools and Resources Guide for Literacy and Basic Skills Agencies” to provide practical assistance bridging literacy and apprenticeship success.

Small to Medium Sized Business: Thunder Bay Ventures CFDC released the 2010 Annual Thunder Bay Small Business Survey in the summer. This survey examines the attitudes of the business community toward specific issues and developments in the local community. The following excerpts confirm that optimism is on the increase. It also confirms that mining is being seen as a key economic driver.

- Hiring expectations for the next 12 months were almost identical to last year’s results with 39% of firms planning to hire additional employees, 58% not planning to hire additional employees, and 3% planning to lay off employees.
- Forty-seven percent (47%) of respondents believe that the Thunder Bay economy will have negative or no growth over the next year. This finding is much more optimistic than the previous year’s result of 71%. This is the first time in six years that the majority of respondents (53%) have thought that the economy is moving towards positive growth.
- The belief that the mining industry is having a positive impact on Thunder Bay’s economy has stayed strong the past two years. Mining was scored the highest by Thunder Bay’s small business owners as the most important industry sector in Thunder Bay.

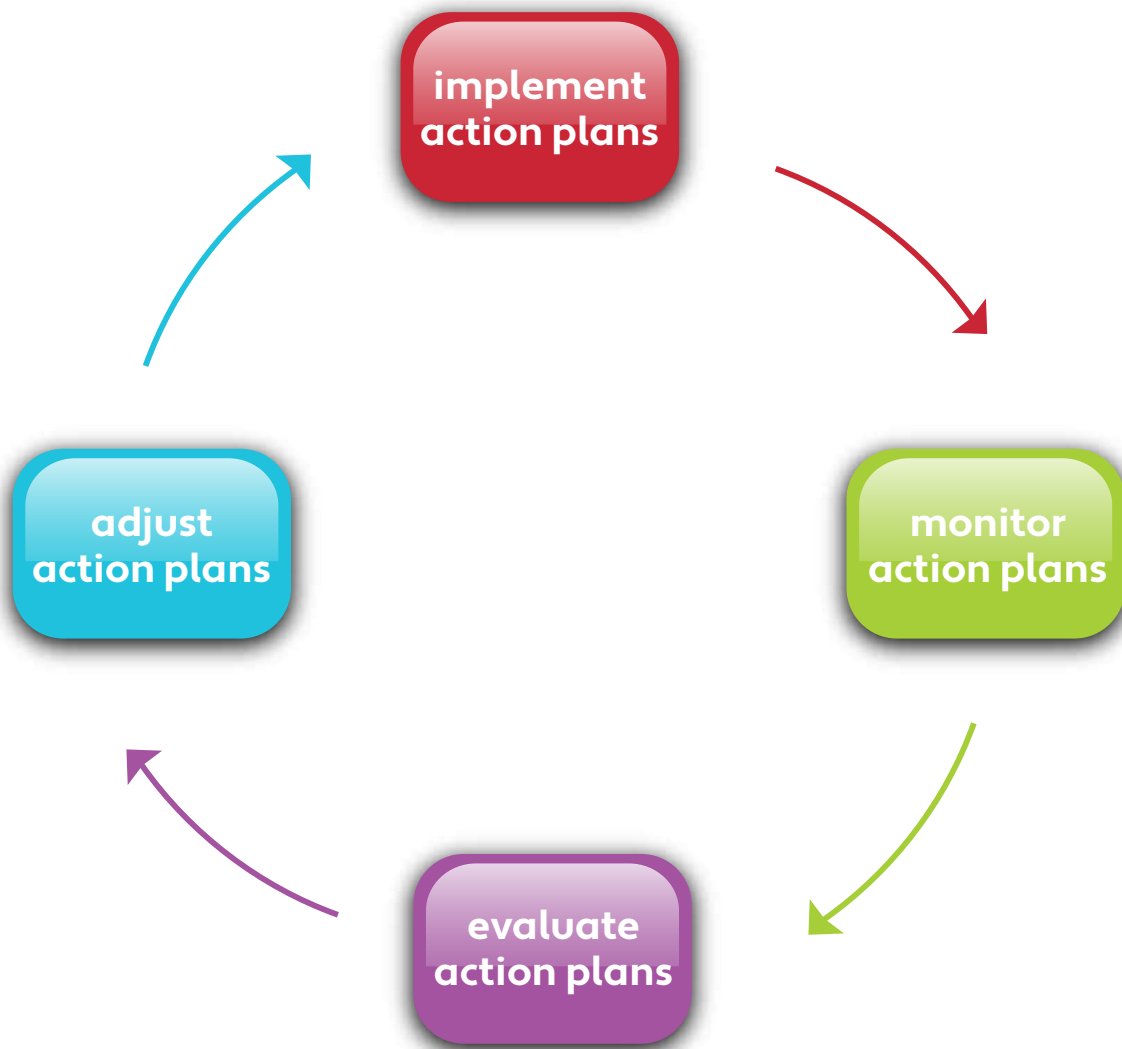
Shifting What We Have Heard to What We Will Do:

The consultations held to update and validate the Plan have reaffirmed much of the Action Plan while identifying areas where the changing economy and employment landscape is calling for refocusing of actions for the coming year. Clearly the strength and speed of the mining sector expansion, both current mining and the Ring of Fire prospects, requires the Plan to be adjusted to incorporate new actions to meet employment and training opportunities. What has been clearly heard is the need to amend the forward looking Action Plan to better position the labour market to meet the mining sector demands.

This significant change in the labour market has resulted in new 2011-2012 actions to respond to high priority mining sector opportunities.

The following Action Plan Update summarizes the accomplishments since 2009 and the actions yet to be taken to advance “Building a Superior Workforce: 2009-2012 Labour Market Action Plan.” On behalf of the North Superior Workforce Planning Board, thank you to the many businesses, organizations and individuals who continue to share their time, knowledge and ideas. Thank you also to the Ministry of Training, Colleges and Universities for their continued support to this new approach to labour market planning.

2009 - 2012 ACTION PLAN UPDATE



Strategic Priority: Accelerate Value-Added and Knowledge Economy

While retaining our strong industries, transition to a value-added knowledge culture that generates high-end products and services based on traditional resource-based and transportation sectors, as well as in the new areas of health, research, education and the bio-economy.

Eight (8) indicators are used to assist in the analysis of local industry sectors. These eight local labour market indicators are: Total Employment and Sector Employment; Employment in Small and Medium Enterprises; Number of Employers; Industrial Structure of Employers; Population Dynamics; Migration; Occupation; and Education. The following indicators are those which may be positively impacted by the successful implementation of the Actions.

Indicators: Total Employment and Sector Employment; Employment in SMEs; Number of Employers; Occupations; Migration; Industrial Structure of Employers; Education.

ACTION	DESCRIPTION & PARTNERS	STATUS	PROGRESS METRICS: OUTCOMES/PRODUCTS	STRATEGY TO ADJUST/AMEND PLAN
Knowledge Economy Labour Demand/Attraction; Needs & Benefits Assessment	<p>Action 1: Inventory Knowledge Economy businesses in the region and conduct a focused labour demand study that profiles current and projected occupation/skill demands over the next three – five years.</p> <p>Lead: NSWPB</p> <p>Partners: Knowledge Economy industry cluster in Thunder Bay; Lakehead University; Confederation College</p>	Completed – Amended (see Strategy to Adjust/Amend Plan)	<p>Publication: Transitioning Thunder Bay to a Knowledge-Based Economy, December 2010.</p> <ul style="list-style-type: none"> An economic profile of the Thunder Bay CMA released in January 2011. Distributed to over 600 stakeholders. Research identified local economic and labour force characteristics including opportunities and challenges to transitioning to a knowledge-based economy. Report information used by Lakehead University and Confederation College to inform program decision-making. Report findings also used by the Thunder Bay Community Economic Development Commission relative to their Strategic Plan. <p>To access report: www.nswpb.ca/community_partnerships/2010_2011/knowledge_economy_report</p>	<p>Action 1: The original scope of this project was revised noting the need to “benchmark” the economic profile of the Thunder Bay CMA. This was to build on an earlier 2009 NSWPB release of District of Thunder Bay Labour Market Inventory which provided a focused labour demand study which encompassed the knowledge economy (2009).</p>
	<p>Action 2: Investigate labour attraction needs and ideas with businesses and economic developers, such as:</p> <ol style="list-style-type: none"> Knowledge economy job vacancy inventory and database, profiling scientific, technical, managerial and professional demands linked to high traffic regional and provincial sites. 	Completed	Current and emerging Knowledge-Based Economy related reports, activities, opportunities and links are noted on several area websites.	Determined that it was not feasible to create and maintain a Knowledge-Based Economy (KBE) database. Rather, decision made to maximize information about area KBE and KBE potential using existing community websites.
	<ol style="list-style-type: none"> Negotiate with a “recruiting” firm for a shared Thunder Bay District client status, expanding recruitment efforts while minimizing individual business costs. 	Removed		Market Research indicates local industries use multiple channels and sources of recruitment. Limited interest in new shared mechanism.

ACTION	DESCRIPTION & PARTNERS	STATUS	PROGRESS METRICS: OUTCOMES/PRODUCTS	STRATEGY TO ADJUST/AMEND PLAN
	<p>3. Develop a knowledge economy ambassador program targeting the attraction of qualified immigrants to fill current and projected vacancies.</p> <p>4. Produce a labour attraction marketing tool to highlight the growth sectors and employment prospects within the region, including the direct (tangible) and indirect (lifestyle) benefits to attract immigrants and expatriates.</p> <p>Leads/Partners: City of Thunder Bay; Thunder Bay Multicultural Association; Thunder Bay Community Economic Development Commission, the Ministry of Citizenship and Immigration, Citizenship Immigration Canada, and all partners in development of the Northwestern Ontario Canada Immigration Portal</p>	<p>In-Progress</p> <p>Completed</p>	<p>The Immigration Committee is leading four (4) specific projects to make the area more welcoming and attractive to newcomers. This includes attracting immigrants for vacancies and business succession planning.</p> <p>Two (2) new information portals launched in 2010 serve to market the direct and lifestyle benefits of the area to prospective offshore and domestic workers. Both receive thousands of “hits” per month.</p> <p>a) Northwestern Ontario Immigration Portal www.immigrationnorthwesternontario.ca</p> <p>b) NSWPB – Labour Market Information Portal www.nwolabourmarketinfo.ca</p> <p>Professions North/Nord, Laurentian University are working with the Thunder Bay Multicultural Association and partners, including NSWPB, to attract internationally trained professionals to fill current and projected vacancies in Northern Ontario.</p> <p>Growth and reputation of Thunder Bay Regional Health Sciences Centre (teaching hospital) continues to result in attraction of medical professionals, physicians and health care professionals.</p>	<p>Actions 3 & 4:</p> <p>Many organizations have in place and/or expanding attraction and retention initiatives including:</p> <p>Northwestern Ontario Immigration Portal, launched in 2010, has been translated into 11 international languages.</p> <p>Immigration Committee facilitated by the North Superior Workforce Planning Board and the Thunder Bay Multicultural Association, works with key community stakeholders in developing/ implementing immigrant strategic action plans.</p>
Health Care Study	<p>Conduct a Health Human Resources study to more accurately profile the skills/occupations and numbers of health care occupations which will be required in Northwestern Ontario over the next five years.</p> <p>Lead: NSWPB</p> <p>Potential Partners: FedNor; North West LHIN; Thunder Bay Regional Health Sciences Centre; Thunder Bay Physician Recruitment and Retention Council</p>	Deferred	To be determined when re-assessed.	<p>Funding Not Available.</p> <p>This proposed Action will be reconsidered in 2013 based on:</p> <p>a) Sector/industry benchmark framework findings</p> <p>b) Re-assessed need from the Health Sector in terms of need/value adding to what they know</p> <p>c) Interest from funding sources</p>
NEW 2011-12 Industry Evaluation Framework for the Mining Sector – Northwestern Ontario	<p>Explore the development of a Mining Industry Matrix that can track industry activity by employee size range; number of businesses; employment; revenue and revenue per worker.</p> <p>Potential Partners: Mining Sector employers; City of Thunder Bay – Community Economic Development Commission; FedNor; Ministry of Northern Development, Mines and Forestry; Ministry of Training, Colleges and Universities.</p>	Planning – Fall 2011	<p>The expected outcomes is a matrix which tracks over time:</p> <ul style="list-style-type: none"> Employee size ranges Number of businesses Employment Revenue Revenue per worker <p>This matrix will help in responding to the labour demands of the Mining Sector growth.</p>	In response to the speed and scope of Mining Sector expansion within the region.

Strategic Priority: Align Education and Training with Changing Skill Requirements

Expand the workforce by aligning skills development (education/training) with changing employer skill requirements that also supports attracting new business investments and value-added jobs.

Indicators: Total Employment and Sector Employment; Employment in SMEs; Number of Employers; Industrial Structure of Employers; Occupations; Education; Migration.

ACTION	DESCRIPTION & PARTNERS	STATUS	PROGRESS METRICS: OUTCOMES/PRODUCTS	STRATEGY TO ADJUST/AMEND PLAN
Labour Market Supply and Demand Study	<p>Completed a sector-focused Labour Market Supply/Demand study including forestry, manufacturing, transportation, construction, mining and the knowledge economy. The purpose was to:</p> <p>a) provide a statistical profile of unemployed/ displaced workers including skill (re)training interests.</p> <p>b) determine employer needs in terms of recruitment issues and changing skills in demand.</p> <p>Lead: NSWPB</p> <p>Partners: Thunder Bay Community Economic Development Commission; FedNor; Northern Ontario Heritage Fund Corporation; Ministry of Training, Colleges and Universities (Labour Market Partnerships Fund)</p>	Completed November 2009	<p>225 individuals (unemployed and underemployed) and 125 businesses participated in this study.</p> <p>Report disseminated to all economic development offices/CFDCs across Northwestern Ontario to be used to inform national and international businesses interested in locating in the region.</p> <p>This study is being used as a labour force supply/demand profile and skills training needs resource by employment and training service providers and economic development offices across the District.</p> <p>Publication of "District of Thunder Bay Labour Market Inventory – November 2009 – Mining, Forestry, Construction, Manufacturing, Transportation, Knowledge-Based"</p> <p>To access report: www.nswpb.ca/lmi_thunderbay</p>	The work from this study as well as the Labour Market Indicators demonstrated growth of the local mining sector, and has prompted a specific new 2011 mining sector employer outreach initiative – this is described below.
Single Access Point Adult Learners	<p>To develop a single access point for adult learners, "The Northwest Education and Training Access Centre" will provide a streamlined single access point for adult learners to the educational opportunities and program services available to them across Northwestern Ontario.</p> <p>Lead: Lakehead Adult Education Centre & Confederation College.</p>	Deferred	A common intake and assessment process and tool with adoption of standard practices by service providers to assess skills.	This action will be reconsidered in 2012 to determine if there is both continued interest in this action as a priority and if funding sources are evident.

ACTION	DESCRIPTION & PARTNERS	STATUS	PROGRESS METRICS: OUTCOMES/PRODUCTS	STRATEGY TO ADJUST/AMEND PLAN
Graduate Retention Study	<p>Recognizing the importance of post-secondary education as fundamental to growing our economy, conducted a graduate retention study to determine factors influencing decisions to stay within the region versus leaving after graduation; and work with education/training institutions to develop graduate retention strategies to mitigate our regional "brain-drain".</p> <p>Lead: NSWPB</p> <p>Partners: Confederation College, Lakehead University</p>	Completed December 2010	<p>Report released Winter 2010 based on consultations with post-secondary institutions. Report linked clearly to graduates looking for opportunities in the knowledge economy. Report recommendations consistent with those in the Transitioning Thunder Bay to a Knowledge-Based Economy report.</p> <p>College and University officials are now considering the recommendations to assess how they may be positioned to help respond to enhance regional graduate retention.</p> <p>Publication "Graduate Retention and the Economy of Northwestern Ontario," December 2010.</p> <p>To access report: http://www.nswpb.ca/community_partnerships_2010_2011/graduate_retention_english</p>	
Regional Career Fair 2011	<p>The North Superior Workforce Planning Board and its partners from throughout the region will stage the eighth annual Regional Career Fair April 29-30, 2011, at the Lakehead University Hangar in Thunder Bay. The Fair will provide "one stop shopping" regarding education, training and career options.</p> <p>Lead: NSWPB</p> <p>Partners: Passport to Prosperity; Lakehead University; Confederation College; Local and Regional School Boards; Northern Ontario Heritage Fund Corporation; TBayTel; The Chronicle Journal; Dougall Media; Employment Ontario Service Providers; Service Canada</p>	April 29, 30 2011	Four thousand (4,000) young people and others will become more aware of training, education and career opportunities throughout the region over this two day event. 120 Interactive Exhibits. Attendees will be in a better position to make the right choices for their education and training.	
NEW 2011 Mining Sector Employer Outreach Initiative (Phase I)	<p>An aging Mining Sector workforce, the expansion of existing mine operations and new Ring of Fire and other exploration activities hold promise for major job and skill demands in the near and long term. The purpose of this Phase I Mining Sector Employer Outreach is to assess employer interest to working in a coordinated effort to develop an upside mining and mining sector labour supply/demand strategy.</p> <p>If employer commitment is confirmed, additional funding for a Phase 2 initiative will be sought. This would result in a comprehensive Mining Sector Labour Development Strategic Plan.</p> <p>Lead: NSWPB</p> <p>Partners: Mining Sector Employers; Confederation College; Ministry of Northern Development, Mines and Forestry; FedNor; Ministry of Training, Colleges and Universities</p>	In Progress	<p>Consultations with over 40 mining sector employers will be completed by April 2011.</p> <p>If employer interest is expressed in contributing to the development of a sector strategy, additional funding sources will be sought.</p>	The scope and speed of Mining Sector developments has necessitated that the Labour Market Plan actions be expanded and accelerated. To be proactive to the high demand for labour market support to facilitate economic opportunities, this Plan must remain flexible to meet emerging needs. Looking forward to 2012-13, the Plan will require some activities to be deferred to provide the latitude for response to mining sector labour market factors and needs.

Strategic Priority: Advance Labour Supply through Attraction & Development Strategies

Attract and develop our future talent supply based on local labour market information and intelligence within the context of a shared plan that complements economic development strategies.

Indicators: Migration; Occupations, Education; Total Employment & Sector Employment; Employment in SMEs.

ACTION	DESCRIPTION & PARTNERS	STATUS	PROGRESS METRICS: OUTCOMES/PRODUCTS	STRATEGY TO ADJUST/AMEND PLAN
<p>Labour Market Information Portal – Feasibility Assessment Phase I</p> <p>Labour Market Information Portal – Launch site Phase II</p>	<p>Assessed feasibility of a community labour market information portal, offering a baseline of current and local labour market information, research, government program summaries and contacts and links to community employment services for the District of Thunder Bay.</p> <p>Launch of sustainable information portal to enhance evidence-based employment and economic development planning, strengthen connections to business and inform program needs.</p> <p>Lead: NSWPB</p> <p>Partners: Employment, economic, municipal and community stakeholders primarily active in data use or generation for purposes of labour market development.</p>	<p>Completed</p> <p>Completed</p>	<p>Phase I – Feasibility assessment confirmed need for local LMI Portal by partners and stakeholders.</p> <p>Phase II - Public launch of site in Winter 2010. This site offers current and local labour market information, research, government program summaries and contacts, and links to community employment services for the District of Thunder Bay. Marketing of site is seeing increased “hits” averaging 600/ month. Community and economic development partners report using the site for research, support of funding proposals and to inform strategic planning processes.</p> <p>www.nwolabourmarketinfo.ca</p>	<p>LMI Portal is creating new opportunities. NSWPB has been approached by partners to consider incorporating a “Community Employment Resource Partnership” online discussion group, as an enhanced feature to the Portal as related to employment strategies across the District. (See New Action “Community Employment Resource Partnership”)</p>
<p>Immigration Forum “Filling the Gaps” 2009</p> <p>Immigration Forum “Strengthening the Foundation” 2010</p>	<p>Convened a one-day conference in November 2009 and again in November 2010 focusing on strategic discussion and partnerships to enhance the area as a “location of choice” for immigrants.</p> <p>Lead: NSWPB & Thunder Bay Multicultural Association</p> <p>Partners: Ministry of Citizenship and Immigration; Citizenship and Immigration Canada; Lakehead University; Confederation College; Thunder Bay Community Economic Development Commission; City of Thunder Bay; Thunder Bay Chamber of Commerce; Literacy Northwest; Service Canada; FedNor; Thunder Bay Public Library; Common Voice Northwest; Northwestern Ontario Municipal Association; Employment Ontario</p>	<p>Completed</p>	<p>Over 150 delegates attended the Forums. The Immigration Committee has since adopted a Strategic Plan and is now working on implementing key priorities related to attracting, hiring, retaining and integrating immigrants to Northwestern Ontario communities.</p> <p>A report of the 2009 and 2010 Immigration Forums can be accessed on the NSWPB website</p> <p>2009 Final Report: http://www.nswpb.ca/community_partnerships_2009_2010/immigration_forum_2009</p> <p>2010 Final Report: http://www.nswpb.ca/community_partnerships_2010_2011/immigration_forum_2010</p>	<p>Planning and facilitation of Immigration Forums will shift to the Thunder Bay Multicultural Association (TBMA).</p> <p>NSWPB will work with TBMA, the Immigration Committee and Laurentian University Professions North/Nord on recruitment/retention strategies for internationally-trained professionals to address underemployment and unemployment issues.</p>

ACTION	DESCRIPTION & PARTNERS	STATUS	PROGRESS METRICS: OUTCOMES/PRODUCTS	STRATEGY TO ADJUST/AMEND PLAN
<p>NEW 2011-13</p> <p>Labour Market Information Strategy - Phase I</p> <p>Develop a multi-stakeholder "Community Employment Resource Partnership" online discussion group on the NSWPB LMI Portal Site.</p>	<p>Community input for site enhancement has identified benefits to enhancing the site by adding an online forum/facilitation service to explore labour market issues and share and create solutions relating to employment strategies across the Thunder Bay District.</p> <p>Lead: NSWPB</p> <p>Partners: Employment Ontario Service Providers; Confederation College; Lakehead University; Thunder Bay Community Economic Development Commission; Aboriginal Employment Resource Committee; Literacy Northwest.</p>	<p>Planning</p>	<p>Activate a Community Employment Resource Partnership Online site on the Labour Market Information Portal to promote the use of relevant, timely and quality labour market information.</p>	<p>The development of a multi-stakeholder "community employment resource partnership" is an important enhancement. This will help to address the frequently heard request for timely, accurate and accessible labour market information. Obtaining and sharing consistent and current labour market information will facilitate sound decision making which affects the regional economy.</p>



RETAIN

Strategic Priority: Enhance Worker Adjustment & Transition

Retain workers in our region's labour market and invest in their skill development to assist transition to new job/skills that meet the needs of employers seeking to establish or expand businesses.

Indicators: Migration; Occupations; Education; Total Employment & Sector Employment; Employment in SMEs.

ACTION	DESCRIPTION & PARTNERS	STATUS	PROGRESS METRICS: OUTCOMES/PRODUCTS	STRATEGY TO ADJUST/AMEND PLAN
Expand Workers Market – Broker Skills	<p>Develop and test a regional “worker inventory” that offers regional, provincial and national employers the prospect of hiring mobile Northwestern Ontario skills for term project work. This flexible deployment of area workers enables workers (and families) to remain in the region, while maximizing opportunities for mobile workers to be recruited outside the region for term employment.</p> <p>Lead: Area businesses Partners: City of Thunder Bay</p>	Amended and Completed	Business lead network is in place. Launch of The Thunder Bay Oil Sands Consortium (now the Thunder Bay Metal Fabricators Association – TBMFA) to help address business attraction and skills redeployment.	<p>The objectives of this action item are being addressed through the The Thunder Bay Metal Fabricators Association TBMFA.</p> <p>This is a partnership of 22 highly-skilled metal trade companies to help expand the potential in attracting opportunities from Western Canada and globally. This Association offers access to skilled sub-contractors capable of handling very substantial projects. Collectively, the Association represents over 800 highly-skilled trades people.</p>
Professional Development for Service Providers	<p>Build on existing service delivery network capacity and linkages by hosting labour market information sessions.</p> <p>Lead: NSWPB Partners: YES Employment Services; Northwest Employment Works; Lakehead Employment Services; Confederation College; Ministry of Training, Colleges and Universities; Literacy Northwest; Northwestern Ontario Development Network; Northwestern Ontario Municipal Association; Northwestern Ontario Associated Chambers of Commerce.</p> <p>Host focus-group sessions and an orientation workshop with and for the EO Service Delivery Network (EOSDN) to inform the development and use of an Assessment and Literacy and Basic Skills Training Referral Guide for Northwestern Ontario. In addition to distributing a limited number of hardcopy guides, the referral guide will be posted on the Literacy Northwest website and promoted broadly throughout the province as a best practice template.</p> <p>Lead: Literacy Northwest Partners: NSWPB; Northwestern Ontario Employment Ontario Service Delivery Network; MTCU.</p>	<p>On-going</p> <p>April – December 2011</p>	<p>Over the past year, seven (7) presentations on Labour Market Information have been developed and delivered for area Employment Ontario Service Providers and community partners.</p> <p>NSWPB linkages with service providers and economic development agencies is contributing to integrating employment and training within the context of economic development.</p> <p>Labour Market Information and capacity has also been presented at over five (5) municipal and economic development meetings/forums.</p> <p>Key expected outcomes of these activities include enhanced partnerships and greater awareness of services amongst the EOSDN, an Assessment and Literacy and Basic Skills Training Referral Skills Guide, and an increase in client referrals for employment-related services and training that supports the achievement of employment goals.</p>	

ACTION	DESCRIPTION & PARTNERS	STATUS	PROGRESS METRICS: OUTCOMES/PRODUCTS	STRATEGY TO ADJUST/AMEND PLAN
Skills, Knowledge and Services Outreach Initiative	<p>Building on the diversity of existing programs, services, agencies and institutions working to meet current and future employment and training needs, developed and implemented a virtual multi-channel (e.g. Web-based; print media; podcast; YouTube; Facebook; Twitter; television; radio; affiliation with 21); employment fairs) outreach program.</p> <p>Lead: NSWPB</p> <p>Partners: Employment Ontario Service Delivery Network; Aboriginal Employment Resource Committee; Confederation College; Lakehead University; school boards; Service Canada; labour unions; private trainers; Northwestern Ontario Associated Chambers of Commerce.</p>	Completed	<p>Four (4) new channels activated to provide options for local residents:</p> <p>www.twitter.com/thunderbaylmi</p> <p>www.facebook.com/nswpb</p> <p>nswpb.wordpress.com (blog)</p> <p>www.youtube.com/nswpb</p> <p>Increased referrals reported by partner groups.</p>	
Older Worker Forum & Employment Ontario Programs Expo	<p>Convened a full day forum specifically targeted to mature or older workers and employers, to explore practical strategies to help address the significant challenges faced by older workers across our region. Workshops included local initiatives to hire, retain and retrain mature workers to maximize the skills and experience of a vital older workforce. Networking opportunities for organizations to share information on programs and services and how to better implement transferable skills recognition and Essential Skills upgrading were included.</p> <p>Lead: NSWPB</p> <p>Partners: Literacy Northwest; Ministry of Training, Colleges and Universities; City of Thunder Bay; Thunder Bay District Labour Council; Lakehead Employment Services; YES Employment Services; Northwest Employment Works; Employment Resource Committee; Confederation College; Lakehead University; Service Canada; Communications, Energy and Paperworkers; Labour Action Centres through the Regional Enhancement Committee; Ontario Disability Support Program.</p>	Completed	<p>Over 140 older/experienced workers, businesses, employment & training providers and other community resources participated in the November 2010 forum.</p> <p>To access final report: http://www.nswpb.ca/community_partnerships_2010_2011/older_worker_forum_final_report</p> <p>200 Older Worker Resource Kits and 200 Older Worker Resource Kits for Employers were updated and distributed. These kits contain information on engaging older workers in the labour force; recruitment and retention and programs that exist to support older workers.</p> <p>To access kits: www.nswpb.ca/community_partnerships_2010_2011</p> <p>EO Service Providers reported a marked increase in the numbers of both individuals and businesses seeking experienced worker assistance, including applications for specific older worker programs.</p>	

Strategic Priority: Aboriginal Economic & Employment Strategies

Invest in our Aboriginal population as they are under-represented in virtually all occupational groupings. This talent loss is significant. Given the Aboriginal population growth and demographics, specific and culturally appropriate investments are needed to mitigate educational, employment and skill development gaps and accelerate workforce integration opportunities.

Indicators: Total Employment and Sector Employment; Employment in SMEs; Migration; Occupations; Education.

ACTION	DESCRIPTION & PARTNERS	STATUS	PROGRESS METRICS: OUTCOMES/PRODUCTS	STRATEGY TO ADJUST/AMEND PLAN
To establish an Employment/ Training Domain Urban Aboriginal Working Group	<p>To develop a collaborative strategy to identify new opportunities to address employment and training needs and service gaps of the Urban Aboriginal community.</p> <p>Lead: Urban Aboriginal Strategy Partners: The consortium has expanded and now consists of Aboriginal employment and training agencies; FedNor; INAC; employers; School Boards; City of Thunder Bay; Confederation College; Lakehead University; Thunder Bay Indian Friendship Centre; Literacy Northwest, etc.</p>	Completed	<p>Sixty (60) partners now participate in a collaborative Urban Aboriginal “circle” or working group established to identify new opportunities to address employment and training needs and service gaps of the Urban Aboriginal community in Thunder Bay.</p> <p>The group has set their committee work and Terms of Reference and is exploring niche activities within the city of Thunder Bay.</p>	<p>This working group, through its expanding terms of reference and networking efforts, has now taken on the scope of work as identified in the “Multi-Party Planning Consortium” (see below). The consortium now consists of all those involved in the “Employment/Training Circle” – namely, Aboriginal employment and training agencies; INAC; employers; School Boards; FedNor; City of Thunder Bay; Confederation College; Lakehead University; Thunder Bay Indian Friendship Centre, etc.</p>
Multi-Party Planning Consortium	<p>The Aboriginal Employment/ Training Working Group through sharing of information will explore a notification process that profiles upcoming economic activities (e.g. construction, utility, mining etc. projects) and convene consortia of relevant employers, education, training, First Nation leaders and service providers to identify practical strategies that result in higher employment participation and provide employers with greater supply of workforce talent.</p> <p>Lead: Urban Aboriginal Strategy Partners: Aboriginal Employment Resource Committee; Aboriginal employment and training agencies; Aboriginal Human Resource Development (Canada); Confederation College; Lakehead University; District School Boards; North Superior Workforce Planning Board; Northwestern Ontario Municipal Association; industry; labour unions; Employment Ontario.</p>		This proposed Action is now being integrated into the work of the established Employment/Training Circle Working Group	

ACTION	DESCRIPTION & PARTNERS	STATUS	PROGRESS METRICS: OUTCOMES/PRODUCTS	STRATEGY TO ADJUST/AMEND PLAN
Aboriginal Youth Forum	<p>Convene a one-day forum with Aboriginal youth to participate in employment-awareness and pathways workshops; leadership skills development; and employer presentations on employability and job readiness skills; apprenticeship/ internship and work experience programs.</p> <p>Lead: National Aboriginal Achievement Foundation</p> <p>Partners: North Superior Workforce Planning Board; Aboriginal Employment Resource Committee; Ministry of Education</p>	Completed – February 10, 2010	<p>This project, Blueprint for the Future (BFF), was led by the National Aboriginal Achievement Foundation. It attracted over 400 Aboriginal, First Nation, Métis and Inuit high school students (grades 9-12) from remote and urban communities. Over 35 workshops were available to attend (2 workshops facilitated by NSWPB); 25 teachers and guidance counsellors; 22 businesses and over 40 organizations participated. Aboriginal youth realized the importance of higher learning, motivation, work experience, and career and education planning.</p> <p>YouTube video of NSWPB Workshops “Totally Trendy Jobs”</p> <p>http://www.youtube.com/watch?v=3fK8BxAghuo</p>	
<p>NEW 2011-12</p> <p>Urban Aboriginal Employment & Training Thunder Bay Forum – Fall 2011</p>	<p>Convene a one-day forum in partnership with the Urban Aboriginal Strategy and the Employment and Training Circle to address employment and training challenges for Aboriginals living within the Thunder Bay CMA. Strategies will be explored to facilitate and improve learning and employment transitions.</p> <p>Leads: Urban Aboriginal Strategy Employment and Training Circle and NSWPB</p> <p>Partners: Members of the Employment and Training Circle</p>	Planning	<p>Two hundred (200) delegates will attend the Forum. The expected outcomes include: raising the profile of the need for high school, post-secondary education in the changing economy; build awareness of employment and training opportunities; access to information to increase use of services and programs available to improve employment outcomes; ways and means to promote access to trades training.</p>	



LABOUR MARKET DATA IN DETAIL



The Thunder Bay Labour Market Analysis section provides an update and an overview of the region's labour market, highlighting its unique features and attributes, key issues impacting the workforce, and the potential opportunities to explore avenues to help advance solutions within the community.

Labour Market Data in Detail

Recognizing the critical need for timely, relevant information, the Ministry of Training, Colleges and Universities made significant investments in statistical data, resources and training to provide Workforce Planning Boards across the 25 planning zones of Ontario with the factual information to:

- Identify new, different or emerging labour market needs and gaps that require attention
- Coordinate and align employers' needs and providers of employment and training services to the benefit of individuals, workers, business, and community
- Coordinate and align labour market and economic development strategies

In 2008, Workforce Planning Boards across Ontario began analyzing local industry sectors using labour market indicators to highlight industry sectors and occupations where there appeared to be labour market opportunities or major challenges to employment. These indicators examined total employment and sector employment; employment in Small and Medium Enterprises (SMEs); total number of employers; industrial structure of employers; population dynamics; migration; occupational data, and educational attainment.

The statistical analysis confirms that Small and Medium sized Enterprises (SMEs) are the primary source of employment growth. Therefore, this report focuses on SMEs (under 100 employees) in identified industries. We have also incorporated larger industries where local knowledge has indicated a need for additional information.

This analysis is a starting point to improve evidence-based labour market planning. Most of the analysis is based on Statistics Canada generated data which is the most current and reliable for this geographic area. It is anticipated that the analysis will evolve over time as the community's requirements evolve and as accurate, reliable information becomes available.

North American Industry Classification System (NAICS)

The North American Industry Classification System (NAICS) is the system used by the statistical agencies of Canada, the United States and Mexico to classify business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the economy. The NAICS is designed to provide common definitions of industrial structure of the three countries and is a comprehensive system encompassing all economic activities. It has a hierarchical structure: at the highest level, it divides the economy into 20 sectors. At the lower levels, it further distinguishes the different economic activities in which businesses are engaged.

Note that the Labour Force Survey (employment data) is available for 16 NAICS sectors (some sectors are combined) and the number of business establishments and revenue data is available for 20 sectors.

1. Sector Employment

Labour Force Survey data for the Northwest Economic Region (Kenora, Rainy River, and Thunder Bay Districts) over the 5-year period 2004 to 2009 shows Construction losing 300 jobs, a decrease of 4.2% of its overall employment. Professional, scientific and technical services shows a sharp decrease of 1,100 jobs over this time period, representing a 26.2% decline in employment. Forestry, fishing, mining, oil and gas shows how the loss of jobs in the forestry industry impacts the entire sector, losing 1,900 jobs over 2004 to 2009, a 38.8% decline.

Table 1: Sector Employment - Northwest Economic Region

	2004 ('000's)	2009 ('000's)	Absolute Change ('000's)	Percent Change (%)
Construction	7.2	6.9	0.3	-4.2
Other services	4.0	3.2	0.8	-20.0
Professional, scientific and technical services	4.2	3.1	1.1	-26.2
Information, culture and recreation	4.5	3.0	1.5	-33.3
Forestry, fishing, mining, oil and gas	4.9	3.0	1.9	-38.8
Trade	16.3	9.9	6.4	-39.3

Source: Statistics Canada, Labour Force Survey, 2004 and 2009 yearly averages

2. Employment in Small and Medium Sized Enterprises (SMEs)

Employment in SMEs (fewer than 100 employees) also reflects gains and losses in the top four SME sectors in the area over the 2008-2010 period. Food services and drinking places continues to be the sector with the greatest employment in the Thunder Bay District, but the impact of the economic downturn is apparent as shown by the decreases in employment December 2008 to June 2010: a loss of 332 jobs. Specialty trade contractors shows modest growth over the time period, increasing employment by 37 jobs, or 1.48%. Employment in Professional, scientific and technical services in the Thunder Bay District grew 1.45% in 2008-09, but declined in 2009-10, losing 88 jobs, representing a decrease of 3.71% of employment in that sector.

Table 2: Employment in Small and Medium Enterprises – Thunder Bay District

NAICS	2008	2009	2010	Absolute Change 2008 - 2009	Percent Change 2008 - 2009	Absolute Change 2008 - 2010	Percent Change (%) 2008 - 2010
722 - Food Services and Drinking Places	5,082	5,033	4,750	-50	-0.97%	-332	-6.53%
238 - Specialty Trade Contractors	2,522	2,540	2,559	18	0.71%	37	1.48%
621 - Ambulatory Health Care Services*	2,325	2,334	2,338	10	0.41%	13	0.56%
541 - Professional, Scientific and Technical Services	2,375	2,410	2,287	34	1.45%	-88	-3.71%

Top 3 by number of workers employed.

**621-Ambulatory Health Care Services are part of Health Care and Social Assistance, which is driven by public policy and will not be included here.*

Source: Statistics Canada, Canadian Business Patterns, December 2008, June 2009, and June 2010

3. Change in Total Number of Employers

The Thunder Bay District saw 232 fewer employers in 2010 than in 2008 (7,860 employers in 2008 compared with 7,628 in 2010). Losses were seen in most Employee Size Ranges; however, establishments of 10-19 employees, 50-99 employees, and 100-199 employees saw gains. Of greatest note is establishments of 100-199 employees, which saw an absolute change of 4 businesses (3 lost in 2009, but an increase of 7 from 2009 to 2010) which represents a 7.27% increase in employers in that size range.

Table 3: Change in Total Number of Employers by Employee Size Range

Employee Size Range	Number of Employers 2008	Number of Employers 2009	Number of Employers 2010	Absolute Change 2008 - 2009	Absolute Change 2008 - 2010	Percent Change (%) 2008 - 2009	Percent Change (%) 2008 - 2010	Ontario Percent Change (%) 2008 - 2010
0	3,197	3,132	3,081	-65	-116	-2.03	-3.63	-2.68
1-4	2,163	2,152	2,117	-11	-46	-0.51	-2.13	4.58
5-9	1,131	1,111	1,068	-20	-63	-1.77	-5.57	-1.39
10-19	700	680	701	-20	1	-2.86	0.14	0.25
20-49	435	453	428	18	-7	4.14	-1.61	-0.41
50-99	131	140	138	9	7	6.87	5.34	-0.64
100-199	55	52	59	-3	4	-5.45	7.27	-2.68
200-499	33	31	25	-2	-8	-6.06	-24.24	-3.06
500+	15	14	11	-1	-4	-6.67	-26.67	-5.61
Total	7,860	7,765	7,628	-95	-232	-1.21	-2.95	-0.38

Source: Statistics Canada, Canadian Business Patterns, December 2008, June 2009, and June 2010

4. Industrial Structure of Employers

Table 4a: Industrial Structure of Employers

Top Three Industries with Greatest Number of Employers, by Employee Size Range (excluding the Public Sector) (Thunder Bay District)

NAICS	0	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500+	Total	%
541 - Professional, Scientific and Technical Services	277	250	40	35	14	6	3	1	0	626	8.21
531 - Real Estate	432	96	18	10	4	2	0	0	0	562	7.37
238 - Specialty Trade Contractors	162	155	58	41	18	9	1	0	0	444	5.82

Source: Statistics Canada, Canadian Business Patterns, December 2008, June 2009, and June 2010

Professional, scientific and technical services has the greatest proportion of employers in the Thunder Bay District, with 626 establishments, comprising 8.21% of total employers. Real Estate also comprises a large proportion of employers, however most employment in this sector is owner-operators (no employees) falling in the “0” employee size range (sole proprietors). Specialty trade contractors, such as drywallers, carpenters, roofers, glaziers, plumbers, etc., holds the third largest proportion of total employers, with 5.82% or 444 establishments.

Forestry and Logging continues to show a high proportion of employers in our region, representing a much higher percentage of these businesses than the province as a whole, although the numbers decreased during the time period. In June 2009, the Thunder Bay District had 289 Forestry and Logging employers, representing 3.72% of all employers. This number fell in June 2010 to 247 employers, a loss of 42 employers in this sector, falling to a distribution percentage of 3.24%, still well above the 0.2% distribution rate of Ontario overall.

Comparative data for the 2008-2010 period shows sectors that have experienced the greatest growth in number of employers in the region. These include gains in the Support Activities for Mining and Oil and Gas Extraction, and Support Activities for Transportation.

Table 4b: Industrial Structures of Employers
Industries with the Greatest Difference in Proportion of Employers than Ontario – June 2010

NAICS	NSWPB Total Employers	NSWPB Distribution %	Ontario Total Employers	Ontario Distribution %	Difference in Distribution %
113 - Forestry and Logging	247	3.24	1,764	0.20	-3.04
721 - Accommodation Services	197	2.58	4,861	0.55	-2.03

Source: Statistics Canada, Canadian Business Patterns, December 2008, June 2009, and June 2010

Table 4c: Industrial Structure of Employers

Industries with the Greatest Absolute and Percentage Growth in Employers, excluding the Public Sector

NAICS	Total Employers 2008	Total Employers 2009	Total Employers 2010	Absolute Change 2008-2009	Percent Change 2008-2009	Absolute Change 2008-2010	Percent Change 2008-2010
236 - Construction of Buildings	253	258	266	5	1.98%	13	5.14%
213 - Support Activities for Mining and Oil and Gas Extraction	28	31	38	3	10.71%	10	35.71%
488 - Support Activities for Transportation	69	68	77	-1	-1.45%	8	11.59%
531 - Real Estate	554	550	562	-4	-0.72%	8	1.44%

Source: Statistics Canada, Canadian Business Patterns, December 2008, June 2009, and June 2010

5. Migration

The Thunder Bay District faces net out-migration in almost all age groups; most remarkably in the 18-44 years of age groupings. Net out-migration of those young or of working age populations subtracts from the local supply of labour.

6. Occupational Data

Many occupations are associated with more than one industry that may be facing challenges. In listing the key occupations (at the 2-digit NOC level), we can also determine if an occupation is more “plentiful” in the NSWPB area than in Ontario as a whole, or less so. This can have an impact on educational and training programs: if the skills required cannot be found locally, industries may need to recruit workers with those skills from afar. Further, if the local demand for an occupation is falling, a danger of local over-supply may exist. The following two tables identify those key occupations which have a higher and a lower proportion of local employment, compared to Ontario.

Table 5: Migration Characteristics 2003-2008

Age Group	In-migrants	Out-migrants	Net-migrants
0-17	4,754	5,258	-504
18-24	3,301	4,827	-1,526
25-44	7,037	8,948	-1,911
45-64	2,633	3,664	-1,031
65+	839	827	12
Total	18,564	23,524	-4,960

Source: Statistics Canada, Taxfiler, 2003 & 2008

Table 6a: Selected Key Occupations with a Higher Proportion of Total Employment than Ontario

NOC	NSWPB Labour Force	NSWPB Distribution %	Ontario Labour Force	Ontario Distribution %	
A2	Managers in retail trade, food and accommodation services	2,345	3.02	182,700	2.77
C1	Technical occupations related to natural and applied sciences	2,390	3.07	185,240	2.81
D2	Technical and related occupations in health	1,315	1.69	76,580	1.16
E0	Judges, lawyers, psychologists, social workers, ministers of religion, and policy and program officers	1,795	2.31	151,710	2.30
E2	Paralegals, social services workers and occupations in education and religion, n.e.c.	1,865	2.40	134,245	2.04
G0	Sales and service supervisors	680	0.87	52,390	0.80
G4	Chefs and cooks	1,255	1.61	80,770	1.23
G5	Occupations in food and beverage service	1,455	1.87	92,215	1.40
H0	Contractors and supervisors in trades and transportation	600	0.77	45,535	0.69
H1	Construction trades	1,820	2.34	146,380	2.22
H2	Stationary engineers, power station operators and electrical trades and telecommunications occupations	1,115	1.43	64,080	0.97
H3	Machinists, metal forming, shaping and erecting occupations	1,040	1.34	85,725	1.30
H4	Mechanics	2,500	3.21	134,020	2.03
H6	Heavy equipment and crane operators, including drillers	965	1.24	30,605	0.46
H7	Transportation equipment operators and related workers, excluding labourers	3,270	4.20	205,885	3.13
I1	Occupations unique to forestry operations, mining, oil and gas extraction, and fishing, excluding labourers	1,510	1.94	14,185	0.22
I2	Primary production labourers	980	1.26	55,030	0.84

Source: Statistics Canada, 2006 Census

Table 6b: Selected Key Occupations with a Lower Proportion of Total Employment than Ontario

NOC		NSWPB Labour Force	NSWPB Distribution %	Ontario Labour Force	Ontario Distribution %
A0	Senior management occupations	520	0.67	82,475	1.25
A1	Specialist managers	1,225	1.58	193,350	2.94
A3	Other managers, n.e.c.	1,805	2.32	207,960	3.16
B0	Professional occupations in business and finance	1,125	1.45	182,195	2.77
B1	Finance and insurance administrative occupations	905	1.16	82,185	1.25
B3	Administrative and regulatory occupations	1,410	1.81	147,560	2.24
C0	Professional occupations in natural and applied sciences	1,395	1.79	266,690	4.05
C1	Technical occupations related to natural and applied sciences	2,390	3.07	185,240	2.81
D0	Professional occupations in health	835	1.07	71,645	1.09
G1	Wholesale, technical, insurance, real estate sales specialists, and retail, wholesale and grain buyers	1,035	1.33	147,880	2.24
H5	Other trades, n.e.c.	420	0.54	45,390	0.69
H8	Trades helpers, construction, and transportation labourers and related occupations	1,620	2.08	153,640	2.33
J0	Supervisors in manufacturing	305	0.39	31,035	0.47
J1	Machine operators in manufacturing	1,650	2.12	162,555	2.47
J2	Assemblers in manufacturing	295	0.38	160,060	2.43
J3	Labourers in processing, manufacturing and utilities	980	1.26	109,950	1.67

Source: Statistics Canada, 2006 Census

7. Educational Attainment

Looking at educational attainment levels from the 2006 Census, comparisons were made of the percentages of the total for the NSWPB area with totals for Ontario as a whole. In the grid to the right, “Higher” has been entered where the local percentage was higher than that of Ontario by at least one percentage point, “Same” represents the local percentage if within one percentage point of Ontario, and “Lower” is used if the local percentage was lower than that of Ontario by at least one percentage point.

Where the proportion of apprentices and those with skilled trades certificates/diplomas is higher than in Ontario, this suggests a more supportive educational environment than in Ontario as a whole. (It follows that a lower proportion suggests a less supportive educational environment than in Ontario.) Similar observations can be made with respect to skills related to college or university attainment.

Generally speaking, the 2006 Census “snapshot” of educational attainment is indicative of the Thunder Bay District’s historic dependence on primary industry, such as Forestry and Logging, which would require a workforce possessing various trades certificates and apprenticeships.

In the table on the following page, details of educational attainment of the Thunder Bay District’s population (15–64 years of age) can be analyzed. Of greatest significance is the “No certificate, diploma or degree”: in each age cohort, the Thunder Bay District percentage is higher than that of Ontario as a whole. These percentages

Table 7a: Thunder Bay District Educational Summary [Compared to Ontario]

Age Cohort	Apprenticeship, Trades	College/CEGEP	University
25 - 34	Higher	Higher	Lower
35-44	Higher	Higher	Lower
45-54	Higher	Higher	Lower
55-64	Higher	Same	Lower

Source: Statistics Canada, 2006 Census

Table 7b: Educational Attainment (Distribution) 2006

	Thunder Bay CD%	Thunder Bay CD # of people	Ontario %	Ontario # of people	Difference in %	# of People difference from ON
Age cohort 15-24	16.03%	19,570	16.55	1,624,835		
No certificate, diploma or degree	44.94%	8,795	39.90%	648,300	5.04%	987
High School Certificate or Equivalent	35.23%	6,895	38.59%	627,015	-3.36%	657
Apprenticeship or Trades Certificate or Diploma	2.45%	480	2.31%	37,475	0.15%	29
College, CEGEP or other non-university Certificate or Diploma	10.42%	2040	9.86%	160,135	0.57%	111
University Certificate Diploma or Degree	6.92%	1,355	9.35%	151,905	-2.43%	475
Total	19,570		1,624,835			

Age Cohort 25-34	13.06%	15,940	15.58%	1,529,590		
No certificate, diploma or degree	11.48%	1,830	8.68%	132,715	2.80%	447
High School Certificate or Equivalent	26.10%	4,160	23.81%	364,260	2.28%	364
Apprenticeship or Trades Certificate or Diploma	8.19%	1,305	5.98%	91,525	2.20%	351
College, CEGEP or other non-university Certificate or Diploma	28.26%	4,505	24.34%	372,355	3.92%	625
University Certificate Diploma or Degree	26.04%	4,150	37.18%	568,735	-11.15%	1,777
Total	15,940		1,529,590			

Age Cohort 35-44	17.60%	21,485	19.43%	1,907,560		
No certificate, diploma or degree	14.06%	3,020	10.47%	199,800	3.58%	770
High School Certificate or Equivalent	24.76%	5,320	24.29%	463,295	0.47%	102
Apprenticeship or Trades Certificate or Diploma	11.38%	2,445	8.64%	164,780	2.74%	589
College, CEGEP or other non-university Certificate or Diploma	28.81%	6,190	23.88%	455,610	4.93%	1,058
University Certificate Diploma or Degree	20.99%	4,510	32.72%	624,075	-11.72%	2,519
Total	21,485		1,907,560			

Age Cohort 45-54	20.90%	25,515	18.86%	1,852,290		
No certificate, diploma or degree	17.38%	4,435	14.50%	268,550	2.88%	736
High School Certificate or Equivalent	26.57%	6,780	27.21%	504,075	-0.64%	164
Apprenticeship or Trades Certificate or Diploma	14.93%	3,810	9.59%	177,640	5.34%	1,363
College, CEGEP or other non-university Certificate or Diploma	23.36%	5,960	21.50%	398,165	1.86%	475
University Certificate Diploma or Degree	17.75%	4,530	27.20%	503,855	-9.45%	2,411
Total	25,515		1,852,290			

Age Cohort 55-64	14.85%	18,130	13.74%	1,348,885		
No certificate, diploma or degree	24.19%	4,385	22.13%	298,460	2.06%	373
High School Certificate or Equivalent	21.81%	3,955	24.39%	329,035	-2.58%	467
Apprenticeship or Trades Certificate or Diploma	15.00%	2,720	10.91%	147,180	4.09%	742
College, CEGEP or other non-university Certificate or Diploma	17.73%	3,215	17.46%	235,500	0.27%	50
University Certificate Diploma or Degree	21.26%	3,855	25.11	338,710	-3.85%	698
Total	18,130		1,348,885			

Source: Statistics Canada, 2006 Census

have been turned into “people,” and in the final column, one can see how many people would need to acquire a certificate, diploma or degree in order to be equivalent to the whole of Ontario. Notably, it is the age cohort of 35-44 years that shows the greatest difference from Ontario: in University Certificate, Diploma or Degree, 2,519 people would need to attain this in order to reach the equivalent percentage of Ontario as a whole.

8. Supplementary Thunder Bay CMA Data

In December 2010, the NSWPB released “Transitioning Thunder Bay to a Knowledge-Based Economy,” prepared by Paul Knafelc of Community Benchmarks Inc. Recognizing the economic shift to expanded knowledge-based economic activities, this report provides the most recent and customized area data that profiles the economy’s “current state” and provides some benchmarks to measure “future state.”

Gross Domestic Product (GDP) measures the total value of all final goods and services produced by an economy. It is the principal way to measure the scale or size of an economy. Thunder Bay CMA’s GDP reached \$5.5 billion in 2008, which is larger than the economy of Prince Edward Island with a \$4.6 billion GDP in the same year.

An examination of Gross Domestic Product growth trends tells us the rate at which an economy is growing (or declining). In order to examine GDP growth, it is necessary to look at Real GDP as it is adjusted for inflation, making year-to-year comparisons possible. Between 2002 and 2008, Thunder Bay’s GDP grew 0.9 percent, which is considerably slower than the 9.4 percent growth rate for Ontario.

The data for December 2008 revealed that Thunder Bay CMA had 6,385 businesses. Of these 3,680 had employees and 2,705 had no payroll employees (i.e. are owner operated).

The very small firm is the predominant form of business in Thunder Bay CMA: 42.4 percent of businesses have no employees and 91.7 percent have less than 20 employees.

Between December 2003 and December 2008, the total number of business establishments within Thunder Bay declined from 6,911 to 6,385 – a decrease of 7.6 percent. Businesses with between 5 and 9 employees showed the greatest absolute gain, increasing from 743 to 879 businesses over this time period. Owner operated businesses experienced the largest absolute decline, decreasing from 3,089 to 2,705 between 2003 and 2008. It should be noted that increases and decreases in the number of establishments refer to the net change.

Table 8a: Gross Domestic Product at Current Dollars Thunder Bay CMA and Provinces - 2008

	(\$ billions)
PEI	\$4.6
Thunder Bay CMA	\$5.5
New Brunswick	\$27.3
Newfoundland	\$31.2
Nova Scotia	\$34.1
Manitoba	\$50.8
Saskatchewan	\$63.5
British Columbia	\$197.9
Alberta	\$291.2
Quebec	\$302.2
Ontario	\$587.8

Source: Statistics Canada and Community Benchmarks Inc., Paul Knafelc, 2010: Transitioning Thunder Bay to a Knowledge-Based Economy

Table 8b: Real Gross Domestic Product Percent Change Thunder Bay CMA and Ontario (2002 millions)

	2002	2008	Percent Change (%)
Thunder Bay CMA	4,848	4,891	0.9
Ontario	477,763	522,444	9.4

Source: Statistics Canada, Community Benchmarks Inc. Paul Knafelc, 2010: Transitioning Thunder Bay to a Knowledge-Based Economy

Table 8c: Number of Business Establishments Thunder Bay CMA – December 2008

Employee Size Range	Number of Businesses 2008	Distribution %
0 (owner operated)	2,705	42.4
1-4 employees	1,723	27.0
5-9 employees	879	13.8
10-19 employees	544	8.5
20-49 employees	340	5.3
50-99 employees	110	1.7
100-199 employees	48	0.8
200-499 employees	23	0.4
500+ employees	13	0.2
Total Businesses with payroll employees	3,680	57.7
Total	6,385	100.0*

Source: Statistics Canada, Canadian Business Patterns Paul Knafelc, 2010: Transitioning Thunder Bay to a Knowledge-Based Economy
*May not sum to 100 due to rounding

The scale and performance of Thunder Bay's economy can also be measured by the revenue generated by area businesses, as revenue data shows the extent of the financial flow into an area.

In 2008, Thunder Bay's business establishments collectively generated \$7.9 billion in revenue; however, between 2003 and 2008 the total revenue generated in Thunder Bay decreased 5.5 percent. Over the same time period, revenue in Ontario increased 14.1 percent.

In 2009, the number of people employed in the Thunder Bay CMA was 59,900, the lowest level since 1998. Between 2001 and 2009, employment in Thunder Bay CMA decreased 2.8 percent compared to a 10.1 percent gain in Ontario.

In 2006, the total employment income generated by Thunder Bay CMA residents reached \$2.3 billion. In the same year, Thunder Bay CMA's median employment income reached \$28,700. Between 2001 and 2006 Thunder Bay's median employment income increased 10.4 percent, slightly outpacing Ontario's 10.2 percent increase.

Table 8f: Employment – Thunder Bay CMA

	Number Employed
1987	61,700
1998	57,400
1999	60,200
2000	60,900
2001	61,600
2002	61,200
2003	65,200
2004	63,000
2005	63,800
2006	61,500
2007	63,200
2008	62,600
2009	59,900

Source: Statistics Canada, Taxfiler
Paul Knafelc, 2010: Transitioning Thunder Bay to a Knowledge-Based Economy

Table 8d: Change in the Number of Business Establishments by Employee Size Range 2003 - 2008

Employee Size Range	Number of Businesses 2003	Number of Businesses 2008	Absolute Change	Percent Change %
0 (owner operated)	3,089	2,705	(384)	(12.4)
1-4 employees	1,991	1,723	(268)	(13.5)
5-9 employees	743	879	136	18.3
10-19 employees	525	544	19	3.6
20-49 employees	355	340	(15)	(4.2)
50-99 employees	115	110	(5)	(4.3)
100-199 employees	52	48	(4)	(7.6)
200-499 employees	24	23	(1)	(4.2)
500+ employees	17	13	(4)	(23.5)
Total	6,911	6,385	(526)	(7.6)

Source: Statistics Canada, Canadian Business Patterns
Paul Knafelc, 2010: Transitioning Thunder Bay to a Knowledge-Based Economy

Table 8e: Revenue Growth/Decline – Thunder Bay and Ontario

	2003	2008	Percent Change (%)
Thunder Bay CMA	\$8,432,196,988	\$7,966,789,359	(5.5)
Ontario	\$1,416,027,763,830	\$1,615,922,702,046	14.1

Source: Statistics Canada, Canadian Business Patterns
Paul Knafelc, 2010: Transitioning Thunder Bay to a Knowledge-Based Economy

Table 8g: Employment Income – Thunder Bay CMA and Ontario

	Total Employment Income 2006	Median Employment Income 2001	Median Employment Income 2006	Median Employment Income Percent Change 2001 to 2006
Thunder Bay CMA	\$2,365,689,000	\$26,000	\$28,700	10.4 %
Ontario	\$275,777,590,000	\$26,600	\$29,300	10.2 %

Source: Statistics Canada, Taxfiler
Paul Knafelc, 2010: Transitioning Thunder Bay to a Knowledge-Based Economy

An examination of where Thunder Bay's employed labour force lives provides insight into the distance Thunder Bay employees are traveling to work, and provides perspective on how far afield businesses based in Thunder Bay CMA must reach to find the labour they require.

In 2006, 52,090 or 94.9 percent of people who worked in Thunder Bay CMA also lived in Thunder Bay CMA. Within the context of Ontario communities, having almost 95 percent of your employed labour force work in the same community as they live is unique, as most communities have a much lower percentage of their employed labour force living within their local area. This attribute is beneficial for the CMA because people earn and spend their money locally, greatly limiting the leakages of money out of the community.

Another 2,105 people who work in Thunder Bay CMA live in the Northwest Economic Region (consisting of Rainy River, Kenora, and Thunder Bay Districts, but excluding Thunder Bay CMA). Depending on where they live within the Economic Region, these people may be commuting anywhere from 10 km to 500 km. Lastly, another 695 people employed in Thunder Bay CMA live outside the Northwest Economic Region entirely. Given the distance, these workers must be either working remotely and/or traveling to work by plane.

To access some of the talent they require, Thunder Bay employers are reaching well beyond the Census Metropolitan Area. While long commutes to work are not uncommon, they are usually defined by driving distance.

Table 8h: Thunder Bay CMA Employed Labour Force – by Place of Residence (2006)

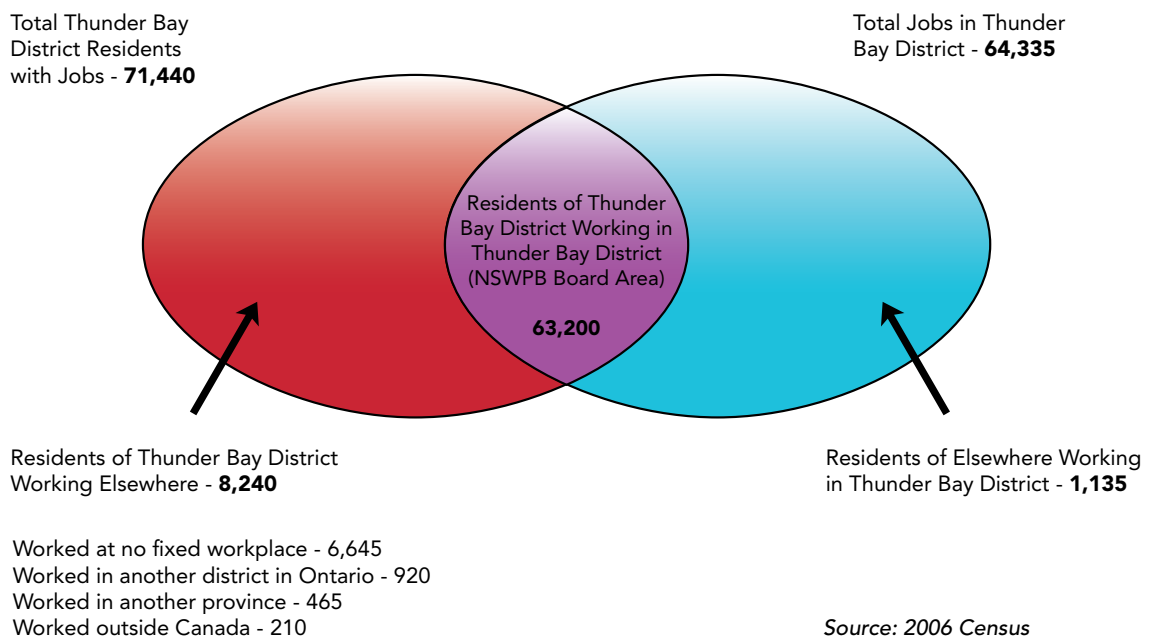
	Live in Thunder Bay CMA	Live in Northwest Economic Region	Live Outside Northwest
Total Employed Labour Force	52,090	2,105	695

Source: Statistics Canada
Paul Knafelc, 2010: *Transitioning Thunder Bay to a Knowledge-Based Economy*

Employed by Place of Residence and by Place of Work

Thunder Bay District (NSWPB area) in 2006

Similarly, for the District of Thunder Bay, 1,135 people were employed in the District but lived elsewhere, while 8,240 people lived in the District but commuted to their place of work outside of the District.



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Appendix A: List of Participating Community Stakeholders

Municipalities

City of Thunder Bay
Municipality of Greenstone
Municipality of Oliver Paipooonge
Township of Nipigon
Township of Red Rock
Township of Terrace Bay
Township of Schreiber
Township of Manitouwadge
Town of Marathon

Government

Citizenship and Immigration Canada
Industry Canada FedNor
Ministry of Community and Social Services
Ministry of Education
Ministry of Infrastructure
Ministry of Municipal Affairs and Housing
Ministry of Northern Development, Mines and Forestry
Ministry of Training, Colleges and Universities
Offices of MP/MPP, Thunder Bay-Superior North
Office of MPP, Thunder Bay-Atikokan
Office of MP, Thunder Bay-Rainy River
Service Canada
Thunder Bay District Social Services Administration Board

Economic Development/Business

Buset & Partners LLP
Entrepreneur Centre – City of Thunder Bay
Northwestern Ontario Associated Chambers of Commerce
Geraldton EDC
KBM Forestry Consultants Inc
Marathon EDC
MLS Financial Services
PARO Centre for Women's Enterprise
Superior North CFDC
Thunder Bay Chamber of Commerce
Thunder Bay Ventures CFDC
Whitehall Contractors Inc.

Labour

Marathon Area Action Centre
Millwrights and Machinists Local 1151
Nipigon Labour Adjustment Committee Co-ordinator
Thunder Bay District Labour Council
Terrace Bay-Schreiber Action Centre Co-ordinator

Aboriginal Organizations

Anishinabek Employment and Training Services
Aboriginal Employment Resource Committee
Aboriginal Liaison Office – City of Thunder Bay
Anishnawbe Mushkiki
EnAble Site Coordinator (Red Rock Indian Band)
Red Rock Indian Band Chief and Council
Ka-Na-Chi-Hih
Indian and Northern Affairs Canada
Matawa First Nations
National Centre for First Nations Governance
Ontario Native Women's Association
Shdokay Abinojiiwak Obimiwedoon
Thunder Bay Indian Friendship Centre

Francophone

Association des francophones du Nord-ouest de l'Ontario
Conseil scolaire de district catholique des Aurores boréales

Regional Businesses and Organizations

CP Rail
Land of the Nipigon Chamber of Commerce
McCausland Hospital
Nipigon District Memorial Hospital
Wilson Memorial General Hospital

Mining

Barrick-Hemlo
Cobra Drilling/Northstar Drilling
GoldCorp. Musselwhite Mine
North American Palladium Inc.
Premier Gold Mines Limited
Numerous Supply and Mining Exploration Companies

Training, Education and Employment

Confederation College
Lakehead District School Board
Lakehead Employment Services (LES)
Lakehead University
Literacy Northwest
Manitouwadge Employment Centre
MTW Employment Services
Negahneewin College
Northwest Employment Works (NEW)
Superior North Literacy (Nipigon)
Thunder Bay Catholic District School Board
YES Employment Services

Appendix B: Thunder Bay District Labour Market Information Web Portal

The Thunder Bay District Labour Market Information Portal was officially launched on January 12, 2011. In its first month, the website received over 1,600 hits from across Northwestern Ontario.

The website offers a baseline of current and local labour market information, research, government program summaries and contacts, and links to community employment services for the District of Thunder Bay.

Opportunity to interact through social media such as Facebook and Twitter have also been incorporated. A periodically updated blog will provide both official data from sources such as Statistics Canada, but also “on the ground” knowledge of local labour market information as gained through both local media sources and local employers.





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