Local Labour Market Plan

UPDATE 2013

www.planningourworkforce.ca

Sudbury & Manitoulin

Workforce Planning

Planification en main-d'oeuvre

WORKFORCE PLANNING FOR SUDBURY & MANITOULIN

MISSION STATEMENT

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

BOARD MANDATE

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

Workforce Planning for Sudbury & Manitoulin (WPSM) is one of twenty-one (21) planning boards and four (4) local planning areas in Ontario. Our role is to engage key partners in communities across Sudbury and Manitoulin to address local labour market issues. Given our unique and neutral role, we are able to bridge some of the divergent views of various labour market partners such as: business; labour; employment service providers; educators/trainers; economic development organizations and others to examine current issues and develop local solutions. This report, the Local Labour Market Plan (LLMP) 2013, provides a foundation on which to build. It provides evidence-based research, corroborated by information from key stakeholders...all of which contributes to informed planning, actions and decision-making on labour market issues.

This report was prepared by Reggie Caverson, Executive Director,
Workforce Planning for Sudbury & Manitoulin

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

This Employment Ontario Project is funded by the Government of Ontario

WPSM would also like to acknowledge the assistance of Tom Zyzis for his data consultation expertise and WPSM Administrative Assistant Colleen Johnson – Malette and Research and Event Planner (Intern) Alexandra Richardson for their contributions to this report.

Table of Contents

EXECUTIVE SUMMARY

This year, we have been witness to the volatility of the natural resources industry, how it is driven by commodity prices and global events, and the ripple effect this has had on other industries in Greater Sudbury and surrounding District. For example, Vale has decided to scale back their Clean AER project due to reduced nickel prices and Cliffs Natural Resources has announced they are temporarily suspending further activity along the Ring of Fire which puts the much anticipated ferrochrome plant (and jobs) near Capreol into limbo. This is not a new phenomenon - it's just the cyclical nature of the mining industry.

There is however cautious optimism as the down cycle is usually temporary. Historically, the storm passes and the economic outlook for the industry begins to stabilize. While some companies in the mining supply services sector have been impacted and laid off skilled trades workers, others are continuing to operate full-steam ahead. Over the years, these companies, an important arm of the mining cluster, have adapted and survived by innovating and modernizing new technologies. They continue to expand their reach into global markets to maintain and in many cases grow their business with existing and new clientele.

Sometimes the mining sector as a whole overshadows growth and decline in other industries, particularly that of SMEs (Small and Medium Enterprises). Most industries in Greater Sudbury and District are SMEs and are the backbone of our economy. Industries include: retail, construction; accommodation and food; professional, scientific and technical services; healthcare and social assistance; etc., which employ significant numbers of people in the area. Diversification of our local economy and growth in these SMEs has contributed to our ability to survive these fluctuations in the mining cycle.

The Manitoulin District also experiences industry fluctuations but different factors such as tourism and access to a suitable labour pool are behind some of these shifts. The main economic drivers of the Manitoulin District continues to be a mix of various SMEs including retail trade; accommodation and food; healthcare and social assistance; construction; and agriculture. The majority of these businesses are small employers who employ fewer than four employees, but each of these industries has experienced some growth.

As we look at industry changes across our Board area, it's equally important to examine workforce needs, where that labour will come from and what training is required. This is not a simple task. In our last labour report, we noted that there are some emerging workforce themes and these will continue to pursue us into the future if we do not respond in a strategic way, but industry it seems is slow to respond.

What we have heard is that many businesses operate on a six month business cycle and as a result, often dismiss the notion of a projected skilled trades' shortage in the near and distant future. Subsequently, it is hard for apprentices to find employers who will help them gain the experiential learning that they need to complete their apprenticeship and become a certified journeyperson. This isn't the only challenge apprentices have and this year we partnered with Mid North Network to examine other challenges such as a lack of basic skills including math, restrictive journeyperson-apprenticeship ratios, stigma surrounding the trades and difficulty writing the provincial testing exam for their trade.

The big question remains - where will our future workforce come from? We continue to have high levels of youth unemployment; few employers who take on apprentices; older workers ready for retirement; market conditions and restructuring that result in layoffs; and persons with disabilities who are able to work but not given the opportunity to do so. Although the list goes on, we know something needs to change.

As you read this report, you will see that it is important for us to be diligent - not only by taking the temperature of industry, but by continuing to address where our future workforce will come from. It is a must to consider in all economic development planning and industry growth as we move forward into the future.

Reggie Caverson
Executive Director

About this report

Across Ontario, workforce planning boards are going through a transition in terms of how we look at and address local labour market issues. Traditionally, we have used data that is available to us through Statistics Canada and other evidence-based sources, and have supplemented this with local consultations to examine and better understand various labour market indicators. This update will include an analysis of the National Household Survey with comparisons to the 2006 Census and information from the Canadian Business Patterns data for the Manitoulin District, the District of Sudbury and the City of Greater Sudbury. To help provide a context, notable private industry changes will be highlighted along with new directions that are emerging (based on discussions with key leaders and media reports) and workforce themes that continue to require attention.*

What will be different about this report is that we have been asked to review client data from Employment Ontario to help us better understand aspects of the supply side of the labour market - in other words, who is looking for work, training or employment assistance. This is good news and makes a lot of sense. It is hard to reflect on industry changes and demands without understanding who is available to do the work. It also provides us with a gauge as to who is seeking these services and what the outcomes are. Data from Employment Ontario includes information from: Employment Services; Literacy and Basic Skills; the Second Career initiative; and information on those who choose the Apprenticeship pathway. This will be supplemented by information from consultations with service managers to help us identify: needs, gaps, training and education, opportunities to improve service, fit with available industry jobs, and trends that are emerging.

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

Census area overview – WPSM Board area

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

Please note: the Employment Ontario data is currently not available by census area and will only be reported as aggregate information for our entire catchment area (WPSM Board area).

For more information and detail on our census area, please go to: www.planningourworkforce.ca under *What we do – areas served.*

**It is important to note that this report does not address changes in the public or non-profit sector where our catchment has experienced jobs losses due to restructuring and changes in funding allocations.*

INDUSTRY HIGHLIGHTS - WHAT'S NEW?

As this is an update report, this section simply offers some quick highlights on local industry changes and workforce-related initiatives to help provide some additional context to the data.

MINING:

- Cliffs Natural Resources temporarily suspended activities related to the Ring of Fire chromite extraction project. They cite delays regarding the environmental assessment, land surface rights and talks with the Ontario government as the reasons for the delay (Northern Ontario Business, January 11, 2013);
- Ring of Fire Aboriginal Alliance announced by Ottawa – plan to offer specialized mining-related training in Matawa First Nations communities (Northern Ontario Business, August 9, 2013);
- One of the largest mines to open in 40 years, Vale's Totten Mine is expected to be operational by the end of the year despite Vale's declining profits. Vale has invested over $760 million into Totten mine which is projected to create about 200 new jobs (Sudbury Star, August 9, 2013);
- Xstrata-Glencore has undergone another name change. Their new name is *Sudbury Integrated Nickel Operations* (Sudbury I-N-O) and they plan to revitalize Fraser Operations near Onaping and work with Vale on a joint project (CBC News, August 6, 2013);

CONSTRUCTION:

- Vale announced a reduction in the scope and timelines of their Clean AER project. This reduction in investment has impacted on forecasted labour needs from the construction industry (Northern Ontario Business, January 11, 2013);
- Although a slower than anticipated start at the outset of 2013, there are a few new construction projects that will last through the winter. In Sudbury new projects include the School of Architecture, the city garage and other medium-sized and smaller projects (Sudbury Star, May 2, 2013);
- According to Denis Shank, Executive Director, Sudbury Construction Association, construction in the area declined slightly from last year and Toronto is experiencing a similar trend except for building construction for the Pan-Am Games by a few larger contractors;

RESEARCH & POLICY:

- The Advanced Medical Research Institute of Canada at Ramsey Lake Health Centre is forging ahead with new research initiatives and new equipment adding to the world class quality of research being conducted in Sudbury (Sudbury Star, July 31, 2013);
- Laurentian University is leading a newly funded, $12 million innovative geo-science research project being supported by mining industry sponsors and the Natural Sciences and Engineering Research Council (Laurentian University, May 14, 2013);
- The recently funded Northern Policy Institute responsible for monitoring the implementation of the Growth Plan for Northern Ontario and making policy recommendations for the area (Ministry of Northern Development and Mines, August 31, 2102) appointed their new founding President Charles Cirtwell (Sudbury Northern Life, July 5, 2013);

YOUTH-RELATED WORKPLACE INITIATIVES:

- The new Youth Employment Fund (YEF) was recently announced and is geared to unemployed, 'not-in-school' students between the ages of 15 and 29. MTCU (Ministry of Training, Colleges and Universities) will provide incentives to employers to help cover the cost of wages and training for new hires when they provide a job placement of four to six months (MTCU website);

- FedNor is funding 13 new jobs/internship positions for young graduates and according to Sudbury Mayor, Marianne Matichuk, this will "Help build the workforce of the future and position our community for sustainable economic growth and prosperity" (Northern Life, August 16, 2013);

TRAINING AND EDUCATION:

- NORCAT (Northern Centre for Advanced Technology) is developing partnerships and extending health and safety training to Kenya's mine workforce (Sudbury Mining Solutions Journal, August 2013);
- Collège Boréal has partnered with the SPCA to be the first college in Canada to offer shelter medicine training in its veterinary technician program (Northern Life, May 7, 2013);
- Ministry of Education launched a new web-based initiative requiring all students to have an IPP (Individual Pathway Plan) that identifies student goals, interests, achievements, courses and post secondary plans. Students, educators and parents will be able to monitor progress. The web-based portal "Career Cruising" includes information on a wide range of careers (www.careeercruising.com);
- Cambrian College appointed a new President - Peter Lawlor former Dean, School of Trades at Northern Alberta Institute of Technology (NAIT) and Collège Boréal appointed a new President - Pierre Riopel, former Director of Education for the Conseil scolaire public du Grand Nord de l'Ontario;

DESIGN:

- A new Fine Arts Bachelor degree with a major in Motion Picture Arts at Thornloe University has been launched – the only one of its kind north of Toronto (Sudbury Living Magazine, February 20, 2013);
- Laurentian University's new School of Architecture opened (downtown Sudbury) with the charter class beginning on September 4, 2013 (The Sudbury Star, September 14, 2013);

TRADES - APPRENTICESHIPS:

- WPSM collaborated with Mid North Network and the Labour Market Group (North Bay) to host a forum on challenges faced by apprentices. These include: lack of awareness re: resources and services available; lack of math and literacy skills; difficulty with provincial testing; restrictive ratios; difficulty finding employers; and stigma surrounding trades (report available at: www.planningourworkforce.ca);
- Women are still underrepresented in the trades and WPSM has brought together area stakeholders to identify the components of a local strategy;

AGRICULTURE:

- According to Brian Bell, an Agriculture Development Advisor with Ontario's Ministry of Agriculture and Food, Mennonite farmers are expanding into the Manitoulin District, beef farming continues to do well, but labour shortfalls are making it difficult for lifestyle farmers to move their horticultural farms to a profitable level and as a result restricts/impacts on growth;

HEALTH & SOCIAL SERVICES:

- The Social Planning Council (SPC) recently completed the *Pathways to Employment* pilot project (funded by MTCU) to develop a model to demonstrate that those currently most-distanced from the workforce can be a reliable workforce base. The model requires industry, government, education and employment stakeholder buy-in, dedicated resources and engagement. A second phase project to develop an integrated labour force strategy is being proposed in collaboration with WPSM. (Janet Gasparini, Executive Director, SPC);
- A new and innovative approach to supplying long-term care facilities with trained nursing staff has been developed by Plan A Health Care Staffing Solutions to meet growing demand using a phone app for scheduling (by highlighting shifts available for appropriately trained staff);

LABOUR MARKET INDICATORS

Labour market information from the National Household Survey and Canadian Business Patterns will be used for this section of the report.

NATIONAL HOUSEHOLD SURVEY (NHS):

Every five years, Statistics Canada carries out a national survey, the most recent in 2011. In past, a 20% sample of census respondents was asked to complete a long-form questionnaire on questions beyond the basic demographics of age and residency. That long-form mandatory census was replaced by a voluntary survey in the 2011 census. As a result, the responses may not reflect a proper representation of the population, particularly when it comes to low income individuals or certain demographic categories (such as Aboriginal people) as their participation may be underrepresented. Since the NHS data relates to employment characteristics of residents (industries/occupations they work in) this would mean that occupations or industries that these individuals are employed in might also be underrepresented. It is also important to keep in mind that this data does not identify what jobs exist.

EMPLOYMENT BY INDUSTRY:

One way to profile the labour market is to look at which industries residents are employed. The proportion of residents employed in a given industry provides a sense of scale for that industry's importance, and changes in the employment mix by industry suggests which industries are growing and which ones are shrinking.

Manitoulin District: Since the Manitoulin District has a small population and a smaller labour force, when numbers are dissected into smaller categories, such as by industries, small differences can appear as large percentage changes. For example, the Mining and Oil & Gas Extraction industry employed 45 Manitoulin residents in 2011. That was a drop from the 2006 figure of 115. In percentage terms that is a decline of 43.5%. On the other hand, the Real Estate and Rental & Leasing industry grew by 75 jobs, but that represented an increase of 375%, having started from a base of 20 in 2006.

As a result, it is necessary to focus on the larger industries (Table 1). In that regard, Manitoulin experienced employment losses due to the following: the elimination of 50 jobs in food product manufacturing and in Transportation and Warehousing (30 fewer jobs in specialized freight trucking, 15 fewer jobs in scenic and sightseeing water transportation, and 15 fewer jobs in the postal service). Notable losses were also experienced in Accommodation & Food Services, with 120 fewer jobs in traveller accommodation, 45 less jobs in RV parks and recreational camps, and 20 fewer jobs in full-service restaurants.

On the positive side, Health Care and Social Assistance experienced an additional 160 jobs, with 75 more jobs in hospitals, 65 more jobs in out-patient care centres, and 50 more jobs in the Social Assistance field (there were also losses in this industry, for example, 35 fewer jobs in nursing and residential care facilities). As noted earlier, Real Estate and Rental & Leasing added 75 jobs, Educational Services grew by 60 jobs and Retail Trade added 50 jobs.

Health Care & Social Assistance accounts for 20.6% of employed Manitoulin residents, with Retail Trade accounting for 12.0%. In third place sits Public Administration (11.1%), followed by Construction (8.6%), Transportation & Warehousing (7.5%), Educational Services (7.4%) and Agriculture, Forestry, Fishing & Hunting (6.1%).

TABLE 1: MANITOULIN DISTRICT - EMPLOYMENT BY INDUSTRY – COMPARISONS BETWEEN 2006-2011					
	Number	Change (%)		Distribution (%)	
	2011	2006-2011		2006	2011
ALL INDUSTRIES	5,250	-0.5%		100.0%	100.0%
Agriculture, forestry, fishing, farming	320	10.3%		5.5%	6.1%
Mining and oil and gas extraction	65	-43.5%		2.2%	1.2%
Utilities	30	-40.0%		0.9%	0.6%
Construction	450	5.9%		8.1%	8.6%
Manufacturing	150	-23.1%		3.7%	2.9%
Wholesale trade	45	-25.0%		1.1%	0.9%
Retail trade	630	8.6%		11.0%	12.0%
Transportation and warehousing	395	-15.1%		8.8%	7.5%
Information and cultural industries	100	42.9%		1.3%	1.9%
Finance and insurance	80	0.0%		1.5%	1.5%
Real estate and rental and leasing	95	375.0%		0.4%	1.8%
Professional, scientific, technical	120	-27.3%		3.1%	2.3%
Management of companies	0	-100.0%		0.3%	0.0%
Administrative and support	135	-6.9%		2.7%	2.6%
Educational services	390	18.2%		6.3%	7.4%
Health care and social assistance	1,080	17.4%		17.4%	20.6%
Arts, entertainment and recreation	90	-30.8%		2.5%	1.7%
Accommodation and food services	245	-44.3%		8.3%	4.7%
Other services	240	17.1%		3.9%	4.6%
Public administration	585	3.5%		10.7%	11.1%

Sudbury District: Somewhat larger than Manitoulin, Sudbury District also exhibits some large percentage changes where the initial base was small, in sectors such as Information and Cultural Industries (150%) and Real Estate and Rental & Leasing (200%). These represent 60 and 90 jobs respectively.

In the Sudbury District (Table 2), Manufacturing declined (25.6%) due to loss of 340 jobs and there were notable losses in paper manufacturing (loss of 175 jobs), wood product manufacturing (loss of 65 jobs), and primary metal manufacturing (loss of 55 jobs).

Accommodation & Food Services also declined (23.2%) with the loss of 175 jobs, mainly in traveller accommodation, RV parks and recreation camps, and full-service restaurants though limited service restaurants added 50 jobs; jobs in Health Care & Social Assistance declined by 10.7% (loss of 125 jobs in hospitals and 55 jobs in nursing and residential care facilities, yet an increase of 70 additional jobs in child daycare services). Wholesale Trade also experienced a loss of 45 jobs (with a decline of 18.4%).

Nevertheless, the increases in employment were even more substantial, with strong increases across the following range of industries: Public administration (up 48.0% with 295 more jobs), two-thirds of the increase in regional and local governments; Educational Services (up 26.7% with 140 more jobs), most in elementary and secondary schools; Agriculture, Forestry, Fishing & Hunting (up 30.4% with 20 more jobs), most in farming, some in logging; and Mining and Oil & Gas Extraction (up 42.1% with 120 job more jobs), all in mining. As noted earlier, there were increases in Information & Cultural Industries and Real Estate and Rental & Leasing. All of these contributed to a net growth of employment of 2.5% among Sudbury District residents.

These changes have re-ordered, somewhat, the industries by proportion of employment. Manufacturing has dropped from the largest industry in 2006 to second place in 2011. Retail Trade, despite shedding some jobs, occupies first place. Public Administration moved from sixth place to third place, while Health Care & Social Assistance dropped from third to fourth. Educational Services, meanwhile, vaulted from eighth to fifth position.

TABLE 2: SUDBURY DISTRICT - EMPLOYMENT BY INDUSTRY – COMPARISONS BETWEEN 2006-2011

	Number	Change (%)		Distribution (%)	
	2011	**2006-2011**		**2006**	**2011**
ALL INDUSTRIES	9,115	2.5%		100.0%	100.0%
Agriculture, forestry, fishing, farming	515	30.4%		4.4%	5.7%
Mining and oil and gas extraction	405	42.1%		3.2%	4.4%
Utilities	30	-40.0%		0.6%	0.3%
Construction	560	0.0%		6.3%	6.1%
Manufacturing	990	-25.6%		15.0%	10.9%
Wholesale trade	200	-18.4%		2.8%	2.2%
Retail trade	1,230	-0.8%		13.9%	13.5%
Transportation and warehousing	655	-9.7%		8.2%	7.2%
Information and cultural industries	100	150.0%		0.4%	1.1%
Finance and insurance	215	13.2%		2.1%	2.4%
Real estate and rental and leasing	135	200.0%		0.5%	1.5%
Professional, scientific, technical	265	32.5%		2.2%	2.9%
Management of companies	0	0.0%		0.0%	0.0%
Administrative and support	290	9.4%		3.0%	3.2%
Educational services	665	26.7%		5.9%	7.3%
Health care and social assistance	875	-10.7%		11.0%	9.6%
Arts, entertainment and recreation	120	4.3%		1.3%	1.3%
Accommodation and food services	580	-23.2%		8.5%	6.4%
Other services	355	2.9%		3.9%	3.9%
Public administration	910	48.0%		6.9%	10.0%

Greater Sudbury: The two largest job loss categories were Manufacturing (down 32%) with 1395 job losses in primary metal manufacturing and 115 job losses in auto parts manufacturing; and Administrative and Support lost 1005 jobs (down 30.6%) with 770 jobs in business support services (includes call centres).

There were, however, many more gains (Table 3): Mining and Oil & Gas Extraction added 1365 jobs, up 24.7% (all in mining); Health Care and Social Assistance gained 1290 jobs, up 13.4% however the changes were very disparate as follows: Out-patients care centres up 1000 jobs; Hospitals down 735 jobs; Nursing and residential care facilities up 260 jobs; Child daycare centres up 240 jobs; Other ambulatory health care services (includes ambulance services, blood banks) down 160 jobs; Public Administration grew by 800 jobs, up 13.5%, almost all in regional and municipal governments; Professional, Scientific and Technical Services increased by 480 jobs, up 14.3%, most in architectural and engineering services; and Educational Services added 455 jobs, up 6.7%, most in elementary and secondary schools.

There have been a few changes in the top five largest industries by employment: Health Care & Social Assistance, which was marginally smaller than Retail Trade in 2006, has now moved into clear first place, followed by Retail Trade. Educational Services has maintained its third place standing. Mining and Oil & Gas Extraction has moved from fifth to fourth place, while Public Administration, despite adding a considerable number of jobs, has dropped from fourth to fifth.

TABLE 3: GREATER SUDBURY - EMPLOYMENT BY INDUSTRY - COMPARISONS BETWEEN 2006-2011					
	Number	% Change		% Distribution	
	2011	2006-2011		2006	2011
ALL INDUSTRIES	77,135	2.5%		100.0%	100.0%
Agriculture, forestry, fishing, farming	210	-19.2%		0.3%	0.3%
Mining and oil and gas extraction	6,900	24.7%		7.4%	8.9%
Utilities	480	0.0%		0.6%	0.6%
Construction	5,020	7.3%		6.2%	6.5%
Manufacturing	3,130	-32.0%		6.1%	4.1%
Wholesale trade	2,890	-0.5%		3.9%	3.7%
Retail trade	9,740	1.0%		12.8%	12.6%
Transportation and warehousing	3,375	-2.7%		4.6%	4.4%
Information and cultural industries	1,250	9.2%		1.5%	1.6%
Finance and insurance	2,170	3.3%		2.8%	2.8%
Real estate and rental and leasing	1,375	27.3%		1.4%	1.8%
Professional, scientific, technical	3,825	14.3%		4.4%	5.0%
Management of companies	20	0.0%		0.0%	0.0%
Administrative and support	2,280	-30.6%		4.4%	3.0%
Educational services	7,200	6.7%		9.0%	9.3%
Health care and social assistance	10,905	13.4%		12.8%	14.1%
Arts, entertainment and recreation	1,310	-5.1%		1.8%	1.7%
Accommodation and food services	4,875	-4.4%		6.8%	6.3%
Other services	3,470	-11.5%		5.2%	4.5%
Public administration	6,705	13.5%		7.9%	8.7%

EMPLOYMENT BY OCCUPATION:

Between 2006 and 2011, the classification system for occupations changed, and as a result, a straight comparison between 2006 and 2011 is not easily done.

Manitoulin District: Sales and Services Occupations is the single largest occupation category (Table 4) among employed Manitoulin residents. What distinguishes the Manitoulin profile of occupations is the relatively larger proportion of jobs in Trades, Transport and Equipment Operators and Related Occupations, Occupations in Education, Law and Social, Community and Government Services, and Health Occupations.

TABLE 4: MANITOULIN DISTRICT – EMPLOYMENT BY OCCUPATION 2011		
	Number in 2011	Distribution of occupations
ALL OCCUPATIONS	5,250	100.0%
Management occupations	645	12.3%
Business, finance, administration	820	15.6%
Natural and applied sciences	125	2.4%
Health occupations	465	8.9%
Education, law, social, government	830	15.8%
Art, culture, recreation and sport	120	2.3%
Sales and service occupations	1,015	19.3%
Trades, transport, equipment operators	975	18.6%
Natural resources, agriculture	155	3.0%
Manufacturing + utilities occupations	105	2.0%

Sudbury District: In the Sudbury District, the prominent feature is the high proportion of jobs in Trades, Transport and Equipment Operators and Related Occupations (Table 5). Jobs in Sales and Services Occupations is still the single largest occupation, and slightly larger than the share elsewhere. Meanwhile, there is a smaller proportion of Sudbury District residents employed in Business, Finance and Administration Occupations.

TABLE 5: SUDBURY DISTRICT – EMPLOYMENT BY OCCUPATION 2011		
	Number in 2011	Distribution of occupations
ALL OCCUPATIONS	9,115	100.0%
Management occupations	1,075	11.8%
Business, finance, administration	960	10.5%
Natural and applied sciences	295	3.2%
Health occupations	445	4.9%
Education, law, social, government	1,035	11.4%
Art, culture, recreation and sport	150	1.6%
Sales and service occupations	2,240	24.6%
Trades, transport, equipment operators	2,000	21.9%
Natural resources, agriculture	390	4.3%
Manufacturing + utilities occupations	525	5.8%

Greater Sudbury: Sales and Service Occupations make up the largest share of employment (Table 6), while the proportion of jobs in Trades, Transport and Equipment Operators and Related Occupations is closer to the average in the rest of the province. The share of jobs in Business, Finance and Administration Occupations, while not at the level found in the GTA, is nonetheless higher than the level in the rest of the province. There is a higher share of jobs in Natural Resources and Agriculture Occupations and in Health Occupations.

TABLE 6: GREATER SUDBURY – EMPLOYMENT BY OCCUPATION 2011		
	Number in 2011	**Distribution of occupations**
ALL OCCUPATIONS	77,135	100.0%
Management occupations	6,710	8.7%
Business, finance, administration	13,215	17.1%
Natural and applied sciences	4,600	6.0%
Health occupations	5,885	7.6%
Education, law, social, government	9,875	12.8%
Art, culture, recreation and sport	1,435	1.9%
Sales and service occupations	17,720	23.0%
Trades, transport, equipment operators	12,560	16.3%
Natural resources, agriculture	3,630	4.7%
Manufacturing + utilities occupations	1,505	2.0%

EDUCATIONAL ATTAINMENT:

Education is regularly cited as a necessary prerequisite to labour market success. Between 2006 and 2011, residents of the Manitoulin District, the Sudbury District and Greater Sudbury, upped their game. Across most age categories, there was advancement in levels of educational attainment.

TABLE 7: LEVEL OF EDUCATIONAL ATTAINMENT BY WPSM BOARD AREA 2006-2011

	Manitoulin District 2006	Manitoulin District 2011	Sudbury District 2006	Sudbury District 2011	Greater Sudbury 2006	Greater Sudbury 2011
15-24 YEARS OLDS						
No certificate, diploma, degree	53%	57%	50%	44%	41%	38%
High school certificate or equivalent	32%	32%	33%	36%	36%	33%
Apprenticeship certificate or equivalent	2%	1%	3%	4%	3%	4%
College certificate or diploma	8%	6%	12%	12%	14%	16%
University certificate, diploma or degree	4%	2%	2%	5%	7%	9%
25-44 YEAR OLDS						
No certificate, diploma, degree	16%	13%	17%	13%	9%	7%
High school certificate or equivalent	27%	25%	30%	24%	23%	21%
Apprenticeship certificate or equivalent	11%	12%	15%	13%	11%	9%
College certificate or diploma	30%	31%	28%	34%	35%	37%
University certificate, diploma or degree	17%	19%	11%	15%	21%	26%
45-64 YEAR OLDS						
No certificate, diploma, degree	25%	17%	31%	23%	22%	15%
High school certificate or equivalent	24%	24%	25%	27%	26%	27%
Apprenticeship certificate or equivalent	15%	16%	17%	17%	13%	12%
College certificate or diploma	22%	27%	18%	22%	23%	27%
University certificate, diploma or degree	13%	17%	9%	10%	17%	19%

CANADIAN BUSINESS PATTERNS:

NUMBER OF EMPLOYERS

Tables 8, 9 and 10 provide the number of employers in the Manitoulin District, the Sudbury District and Greater Sudbury in 2013, broken down by industry and employee size ranges. The highlighted cells identity the three industries with the largest number of firms for each employee size category column.

Manitoulin District: The Manitoulin District has considerably fewer firms with no employees compared to Ontario as a whole, but has a higher proportion of firms with 1-4 and 5-9 employees. In other size categories, the proportions are much the same. The second to last column lists the percentage distribution of all firms by industry. Retail Trade makes up the largest sector, accounting for 13.7% of all employers in Manitoulin, much higher than the provincial average of 9%. Construction and Accommodation & Food Services are almost tied for second place. On the other hand, the Professional, Scientific and Technical Services industry (professionals and consultants) makes up 6.3% of all employers, much less than the provincial average of 15.1%.

TABLE 8: MANITOULIN DISTRICT
NUMBER OF EMPLOYERS BY EMPLOYEE SIZE RANGE - JUNE 2013

INDUSTRY SECTOR 2-DIGIT NAICS	NUMBER OF EMPLOYEES								%	RANK
	0	1-4	5-9	10-19	20-49	50-99	100+	TOTAL		
11 Agriculture	72	18	0	3	0	1	0	94	11	**4**
21 Mining	2	0	2	0	0	0	0	4	1	19
22 Utilities	3	0	0	0	0	0	0	3	1	20
23 Construction	36	39	15	6	1	0	0	97	12	**2**
31-33 Manufacturing	15	7	3	1	0	0	0	26	3	10
41 Wholesale Trade	11	4	2	1	0	0	0	18	2	16
44-45 Retail Trade	31	34	27	16	6	2	0	116	14	**1**
48-49 Transportation/Warehousing	19	9	1	3	0	1	1	34	4	9
51 Information and Cultural	4	5	0	2	0	0	0	11	1	17
52 Finance and Insurance	15	5	0	1	5	0	0	26	3	10
53 Real Estate	39	7	4	1	1	0	1	53	6	7
54 Professional Scientific Tech	34	16	3	0	0	0	0	53	6	7
55 Management of Companies	15	1	2	0	0	0	1	19	2	15
56 Administrative Support	10	8	0	0	0	2	1	21	3	12
61 Educational Services	0	4	0	0	0	0	1	5	1	18
62Health Care & Social Assist	7	22	14	6	4	5	1	59	7	6
71 Arts, Entertainment & Rec	10	5	3	1	1	0	0	20	2	13
72 Accommodation & Food	44	23	17	10	1	0	0	95	11	**3**
81 Other Services	28	34	4	1	1	3	0	71	8	**5**
91 Public Administration	1	2	1	4	8	2	2	20	2	13
TOTAL	396	243	98	56	28	16	8	845		
Percentage of all employers	47%	29%	12%	7%	3%	2%	1%	100		
ONTARIO percentage of all employers	57%	24%	8%	5%	4%	1%	1%			

Source: Statistics Canada, Canadian Business Patterns

Sudbury District: Similar observations that applied for the Manitoulin District hold true for the Sudbury District: fewer firms with no employees; more very small firms; Retail Trade having the largest number of employers (14.1%); but in this instance, the top three industries are virtually tied, with Accommodation & Food Services a very close second, Construction third. The Professional, Scientific and Technical Services industry makes up a small proportion of all employers in the District at 3.7% less than a quarter of the Ontario average.

TABLE 9: SUDBURY DISTRICT NUMBER OF EMPLOYERS BY EMPLOYEE SIZE RANGE - JUNE 2013										
INDUSTRY SECTOR 2-DIGIT NAICS	NUMBER OF EMPLOYEES								%	RANK
	0	1-4	5-9	10-19	20-49	50-99	100+	TOTAL		
11 Agriculture	63	26	9	4	0	1	0	103	9	**4**
21 Mining	4	0	0	2	0	0	3	9	1	18
22 Utilities	2	1	0	3	0	0	0	6	1	20
23 Construction	70	60	17	10	1	0	0	158	14	**3**
31-33 Manufacturing	12	11	2	6	1	1	2	35	3	11
41 Wholesale Trade	16	10	3	0	0	2	0	31	3	12
44-45 Retail Trade	49	42	36	29	4	3	2	165	14	**1**
48-49 Transportation/Warehousing	42	21	6	2	3	2	1	77	7	7
51 Information and Cultural	1	5	3	1	0	0	0	10	1	17
52 Finance and Insurance	20	5	4	3	5	0	0	37	3	10
53 Real Estate	59	19	1	0	3	0	0	82	7	6
54 Professional Scientific Tech	29	8	2	3	1	0	0	43	4	9
55 Management of Companies	16	0	1	0	1	0	0	18	2	16
56 Administrative Support	17	8	3	2	0	0	1	31	3	12
61 Educational Services	2	1	2	3	0	0	0	8	1	19
62Health Care & Social Assist	9	24	7	8	5	2	2	57	5	8
71 Arts, Entertainment & Rec	12	12	2	2	0	0	0	28	2	14
72 Accommodation & Food	81	43	20	10	6	4	0	164	14	**2**
81 Other Services	35	38	12	1	0	0	0	86	7	**5**
91 Public Administration	1	2	3	3	7	3	1	20	2	15
TOTAL	540	336	133	92	37	18	12	1168		
Percentage of all employers	46%	29%	11%	8%	3%	2%	1%	100%		
ONTARIO percentage of all employers	57%	24%	8%	5%	4%	1%	1%			

Source: Statistics Canada, Canadian Business Patterns

GREATER SUDBURY: Greater Sudbury also has a smaller proportion of firms with no employees compared to the provincial figures, with a larger share of firms in the 5-9, 10-19 and 20-49 employee categories. Since last year, Real Estate and Rental & Leasing has moved to top spot as the industry with the most employers, entirely due to a significant increase in the number of firms with no employees in the Real Estate sector. Retail Trade and Construction follow at second and third place. Unlike Manitoulin District and Sudbury District, Greater Sudbury does have a larger Professional, Scientific and Technical Services sector, representing the fourth largest industry by number of employers, although at 10.4% still considerably below the provincial average. The fifth largest number of employers is found in Health Care & Social Assistance.

TABLE 10: GREATER SUDBURY NUMBER OF EMPLOYERS BY EMPLOYEE SIZE RANGE - JUNE 2013										
INDUSTRY SECTOR 2-DIGIT NAICS	NUMBER OF EMPLOYEES								%	RANK
	0	1-4	5-9	10-19	20-49	50-99	100+	TOTAL		
11 Agriculture	43	25	6	7	3	0	1	85	1	17
21 Mining	46	18	3	8	6	7	7	95	1	16
22 Utilities	4	5	3	0	0	0	0	12	0	19
23 Construction	456	279	117	87	46	15	12	1012	12	**3**
31-33 Manufacturing	69	51	47	36	30	13	8	254	3	13
41 Wholesale Trade	112	78	81	62	44	10	3	390	5	9
44-45 Retail Trade	290	254	232	166	89	32	19	1082	12	**2**
48-49 Transportation/Warehousing	165	73	32	19	13	10	4	316	4	11
51 Information and Cultural	42	13	9	10	5	2	3	84	1	18
52 Finance and Insurance	350	87	44	31	47	3	2	564	7	7
53 Real Estate	854	141	41	28	18	2	1	1085	13	**1**
54 Professional Scientific Tech	513	262	61	32	26	10	3	907	10	**4**
55 Management of Companies	272	16	6	7	9	1	0	311	4	12
56 Administrative Support	117	79	46	34	22	9	11	318	4	10
61 Educational Services	44	19	15	7	8	2	7	102	1	15
62Health Care & Social Assist	188	368	102	88	38	10	15	809	9	**5**
71 Arts, Entertainment & Rec	58	30	20	18	12	1	3	142	2	14
72 Accommodation & Food	84	66	71	93	76	33	4	427	5	8
81 Other Services	243	269	101	58	27	8	4	710	8	6
91 Public Administration	2	0	0	1	1	1	1	6	0	20
TOTAL	3952	2133	1037	792	520	169	108	8711		
Percentage of all employers	45%	24%	12%	9%	6%	2%	1%	100		
ONTARIO percentage of all employers	57%	24%	8%	5%	4%	1%	1%			

Source: Statistics Canada, Canadian Business Patterns

CHANGE IN THE NUMBER OF FIRMS BY INDUSTRY, JUNE 2012 TO JUNE 2013

Changes in the number of employers are experienced differently across the various industries. Tables 11, 12, and 13 highlight the changes in the number of firms by industry and employee size between June 2012 and June 2013 for the Manitoulin District, the Sudbury District and Greater Sudbury. Each table also lists the total number of firms in each industry in June 2013, to provide a context. The colour-coding of the tables (green where there is an increase, red where there is a decrease) helps to illustrate any pattern.

Manitoulin District: In the last year, there has been hardly any change among firms with 20-99 employees or 100 or more employees. Even where there has been change, it does not necessarily mean that a new firm emerged or an existing firm closed – it can also mean that the firm either grew or shrank and thus moved into a different category.

Overall, the balance has been in favour of growth among firms with no employees and decrease among firms with 1-19 employees. Only a few industries have a consistent pattern across all size categories: Health Care & Social Assistance as well as Other Services show growth among firms less than 100 employees. Notable losses are among: Construction; Manufacturing; Wholesale Trade; and Professional, Scientific and Technical Services.

TABLE 11: MANITOULIN DISTRICT
CHANGE IN THE NUMBER OF EMPLOYERS, BY INDUSTRY AND BY FIRM SIZE, JUNE 2012 TO JUNE 2013

INDUSTRY	Firm size (number of employees)					Total number of firms June-13
	0	1-19	20-99	100+	Total	
Agriculture, forestry, fishing and farming	13	-4	0	0	9	94
Mining and oil and gas extraction	1	1	0	0	2	4
Utilities	2	0	0	0	2	3
Construction	-15	6	-1	0	-10	97
Manufacturing	2	-5	0	0	-3	26
Wholesale trade	0	-3	0	0	-3	18
Retail trade	0	-10	0	0	-10	116
Transportation and warehousing	4	-2	-1	1	2	34
Information and cultural industries	1	0	0	0	1	11
Finance and insurance	2	-3	0	0	-1	26
Real estate and rental and leasing	5	0	1	0	6	53
Professional, scientific and technical services	-1	-4	0	0	-5	53
Management of companies and enterprises	-1	0	0	0	-1	19
Administrative and support	0	-2	0	0	-2	21
Educational services	-3	0	0	0	-3	5
Health care and social assistance	3	3	1	0	7	59
Arts, entertainment and recreation	-2	-1	0	0	-3	20
Accommodation and food services	7	-5	-1	0	1	95
Other services	3	2	1	0	6	71
Public administration	-1	-1	0	0	-2	20
TOTAL	20	-28	0	1	-7	845

Statistics Canada, Canadian Business Patterns, June 2012 and June 2013

Sudbury District: For Sudbury District, the general pattern over the last year has been no change among firms with more than 100 employees, declines among firms with 20-99 employees, and increases among firms with no employees or 1-19 employees. Patterns among industries: broad increases in Construction; Transportation & Warehousing; Real Estate, Rental & Leasing; declines in Manufacturing; Professional, Scientific and Technical Services; and Educational Services. Mining and Oil & Gas Extraction saw two more firms added to the 100 or more employee category (one likely migrating from the 20-99 employee column).

TABLE 12: SUDBURY DISTRICT CHANGE IN THE NUMBER OF EMPLOYERS, BY INDUSTRY AND BY FIRM SIZE, JUNE 2012 TO JUNE 2013						
INDUSTRY	Firm size (number of employees)					Total number of firms June-13
	0	1-19	20-99	100+	Total	
Agriculture, forestry, fishing and farming	-7	0	0	0	-7	103
Mining and oil and gas extraction	1	0	-1	2	2	9
Utilities	1	-3	0	0	-2	6
Construction	7	12	1	0	20	158
Manufacturing	-5	4	-4	0	-5	35
Wholesale trade	0	1	-1	0	0	31
Retail trade	9	9	-1	0	17	165
Transportation and warehousing	5	1	2	0	8	77
Information and cultural industries	0	-1	0	0	-1	10
Finance and insurance	0	1	-1	0	0	37
Real estate and rental and leasing	14	9	2	0	25	82
Professional, scientific and technical services	-3	-2	0	0	-5	43
Management of companies and enterprises	1	0	0	0	1	18
Administrative and support	-1	1	0	0	0	31
Educational services	-3	-3	0	0	-6	8
Health care and social assistance	1	10	-1	0	10	57
Arts, entertainment and recreation	0	5	-2	0	3	28
Accommodation and food services	13	-5	2	0	10	164
Other services	4	-6	0	0	-2	86
Public administration	1	-1	-1	0	-1	20
TOTAL	38	32	-5	2	67	1168

Statistics Canada, Canadian Business Patterns, June 2012 and June 2013

Greater Sudbury: In the case of Greater Sudbury, the pattern is more broadly positive. Apart from Wholesale Trade and Management of Companies and Enterprises (this sector represents holding companies and head offices), most industries experienced increases, often in every size category (or at the very least, no change). Large and/or widespread increases were registered in: Retail Trade; Finance & Insurance; Real Estate and Rental & Leasing; Professional, Scientific and Technical Services; Health Care & Social Assistance; and Arts, Entertainment & Recreation.

TABLE 13: GREATER SUDBURY CHANGE IN THE NUMBER OF EMPLOYERS, BY INDUSTRY AND BY FIRM SIZE, JUNE 2012 TO JUNE 2013						
INDUSTRY	**Firm size (number of employees)**					**Total number of firms June-13**
	0	**1-19**	**20-99**	**100+**	**Total**	
Agriculture, forestry, fishing and farming	6	2	0	1	9	85
Mining and oil and gas extraction	25	7	1	-2	31	95
Utilities	2	3	0	0	5	12
Construction	47	-15	-4	3	31	1012
Manufacturing	12	-4	0	0	8	254
Wholesale trade	-29	-3	-2	1	-33	390
Retail trade	20	3	12	-1	34	1082
Transportation and warehousing	11	-9	0	1	3	316
Information and cultural industries	7	2	1	1	11	84
Finance and insurance	23	6	2	0	31	564
Real estate and rental and leasing	136	23	3	1	163	1085
Professional, scientific and technical services	68	8	-2	1	75	907
Management of companies and enterprises	-1	-2	2	-1	-2	311
Administrative and support	21	-1	0	2	22	318
Educational services	12	-3	1	-1	9	102
Health care and social assistance	59	38	-3	0	94	809
Arts, entertainment and recreation	9	5	2	1	17	142
Accommodation and food services	16	-3	12	0	25	427
Other services	17	-10	5	0	12	710
Public administration	-1	1	-1	0	-1	6
TOTAL	460	48	29	7	544	8711

Statistics Canada, Canadian Business Patterns, June 2012 and June 2013

EMPLOYMENT ONTARIO – PROGRAM RELATED DATA

BACKGROUND:

This section of the report is a departure from previous local labour market plans. It includes an analysis of data provided by Ontario's Ministry of Training, Colleges and Universities. Data includes information on clients who use/are registered in the following: Employment Services; Literacy and Basic Skills; Second Career; and Apprenticeship Programs for the 2012-13 fiscal year. Data was provided for: a) the WPSM Board catchment area, b) the Northern region (includes WPSM and five other planning boards), and c) Ontario.

UNDERSTANDING THE DATA:

As noted, it is valuable to look at the "supply" side of the labour market, in other words who is ready and available to work. However, since this is the first time that the data has been made available, there are some limitations/cautions we need to consider when interpreting the data. First, the Employment Services' data only captures those individuals who *entered and exited* their system as a registered (assisted) client over a one year period. For example, Employment Services' data does not capture all individuals who are unemployed, those who visited the Employment Service office for other services (such as assistance with their resume, online job applications, exploring the job board, etc., which are counted elsewhere) or those who are in the system as a registered client but have not yet exited. Each program area has similar limitations and data-subcategories used within each program and across programs also vary which limits our ability to make cross-program comparisons. Last, although we have significant demographic and economic differences between the three census areas that make up the WPSM Board area, data provided includes the entire geographic area of the WPSM Board area and has not been broken down by census area (which we traditionally use).

As a result, the data requires a context or use of other comparisons for interpretation purposes. The analysis which follows offers some context but again is limited. In some cases, we are only able to make some comparisons between the local, regional and provincial levels and in other cases, we offer comparisons to labour market data from the National Household Survey (2011) or the Labour Force Survey.

Even though we are flagging some cautions regarding the interpretations we can make, the data is nevertheless useful in getting a general sense of who is unemployed and uses local services provided by Employment Ontario. All of this is supplemented by consultations with local service provider managers.

EMPLOYMENT SERVICES (ES) - CLIENT DATA:

Table 1 compares the number of ES clients served to local population and unemployment figures. However, the estimated figure for the total number of unemployed in the WPSM Board area is limited to the unemployed in Greater Sudbury (only data available). As well, ES client data covers the fiscal year (April 1, 2012 to March 31, 2013) whereas unemployed figures are based on a calendar year (January 1, 2012 to December 31, 2012).

Although Greater Sudbury makes up close to 80% of the WPSM Board area, this information provides a useful approximate comparison however it is only a rough calculation and as a result undercounts the unemployed population.

Nevertheless, one can still infer that ES clients in the WPSM board area make up a larger share of the unemployed than the provincial average and that local services appear to have more clients entering and exiting the system when compared to the number of unemployed.

TABLE 14: NUMBER OF ES CLIENTS COMPARED TO TOTAL POPULATION AND UNEMPLOYED			
	WPSM BOARD AREA	NORTHERN	ONTARIO
CLIENTS			
Number	3,951	16,887	184,947
As % of Ontario	2.1%	9.1%	100%
TOTAL POPULATION			
Number	194,518	775,178	12,851,821
As % of Ontario	1.5%	6.0%	100%
TOTAL UNEMPLOYED*			
Number	6,100	27,500	573,000
As % of Ontario	1.1%	4.8%	100%
ES CLIENTS AS A % OF ALL UNEMPLOYED*			
	65%	61%	32%

Unemployed figures are taken from the Labour Force Survey (2012) and population figures are from StatCan 2011 Census. Unemployed figures for the WPSM board area only includes data for Greater Sudbury CMA which accounts for around 80% of the Board area's population, and as a result, does not necessarily account for the same proportion of the area's unemployed. These cells are shaded pink, to signify caution.

EMPLOYMENT SERVICES - ES CLIENTS BY AGE GROUP:

TABLE 15: DISTRIBUTION BY AGE OF ES CLIENTS AND UNEMPLOYED						
	ES CLIENTS			ALL UNEMPLOYED		
Age range	Board area	Northern	Ontario	Board area	Northern	Ontario
15-24 years	29.1%	30.9%	21.1%	37.7%	37.7%	31.7%
25-44 years	48.0%	45.1%	47.5%			37.0%
45-64 years	22.6%	23.5%	30.6%			29.4%
over 65 years	0.4%	0.5%	0.8%			1.8%

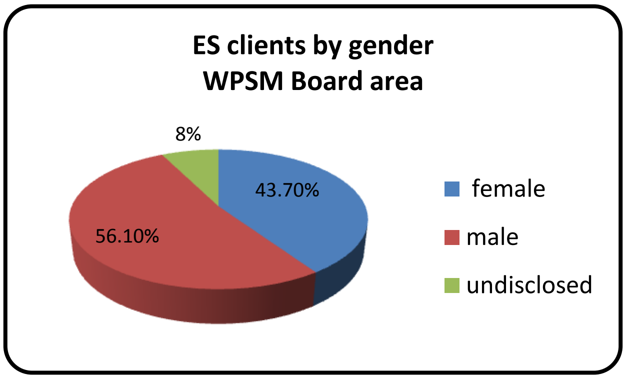
The figures for the unemployed in Ontario are from the Labour Force Survey for Ontario, 2012, StatCan CANSIM Table 282-0002; figures for the unemployed for the northern region are from Greater Sudbury CMA figures. The Greater Sudbury CMA represents only 21% of the northern region's population.

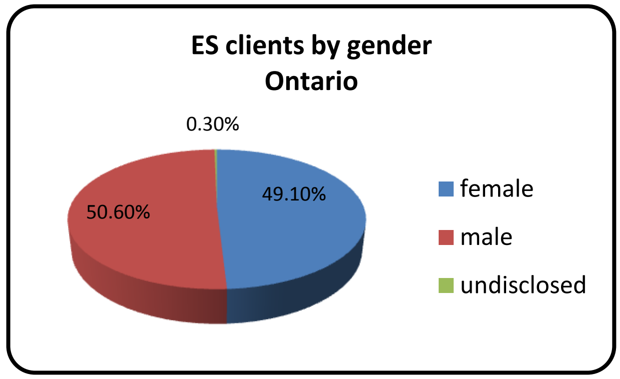
Comparing Ontario figures first, one can see that youth are underrepresented among ES clients, compared to their share of the unemployed population (21.1% compared to 31.7%). Similarly, adults aged 25-44 years are over-represented among ES clients (47.5% compared to 37.0%). The 45-64 years and 65 years and over adult categories are almost equally represented among ES clients and the total unemployed population.

The only contextual comparison one can turn to is the unemployment figure for 15-24 year olds for the Greater Sudbury CMA (37.7%) which is not matched by their lower share of ES clients (29.1%). Producing similar comparisons at the northern level are limited by the reduced reliability of Labour Force Survey data when dissected by both age and geography. For the Northern region as a whole, this is less than satisfactory, and so this cell is shaded pink to signify caution with this data.

EMPLOYMENT SERVICES – ES CLIENTS BY GENDER:

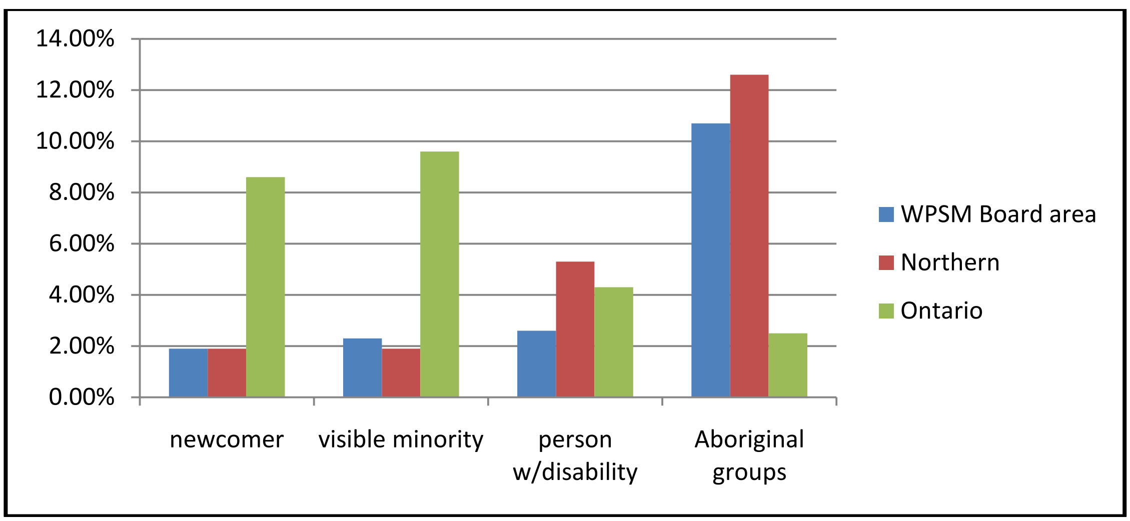
Across the province, females make up a slightly higher proportion of ES clients than in the WPSM Board area and males form a slightly lower proportion of ES clients than in the WPSM Board area.





Although not depicted here, in Ontario, females make up a slightly higher portion of ES clients than their share of the unemployed (49.2% vs. 44.8%) whereas in the WPSM board area, males form a slightly higher portion of ES clients than their share of unemployed (56.1% vs. 52.5%). As previously noted, the unemployed figures for Ontario are derived from the Labour Force Survey for Ontario 2012 (StatCan CANSIM 282-0004) and the unemployed figures for the WPSM Board area are derived from the Labour Force Survey for the Greater Sudbury CMA.

EMPLOYMENT SERVICES - ES CLIENTS BY DESIGNATED GROUPS:



The ES client data collects information on designated groups, namely: newcomers, visible minorities, persons with disabilities, and members of Aboriginal groups. This information is self-reported and it is not evident how many individuals declined to answer this question.

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

EMPLOYMENT SERVICES - ES CLIENTS BY EDUCATIONAL ATTAINMENT:

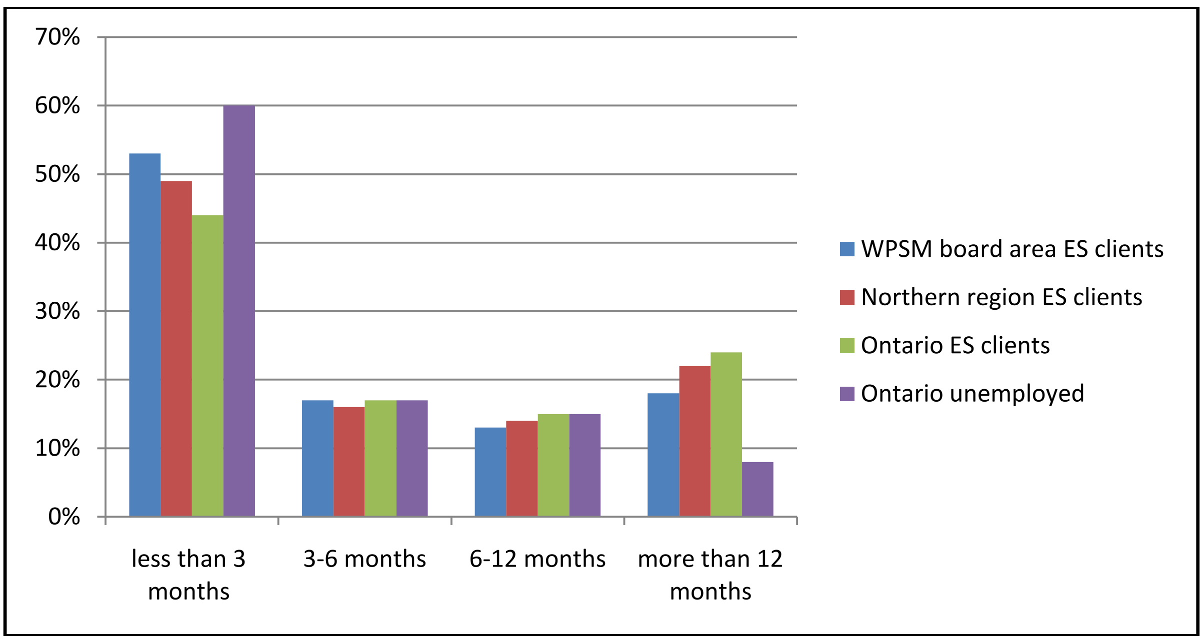
TABLE 16: EDUCATIONAL ATTAINMENT LEVELS AMONG ES CLIENTS AND UNEMPLOYED

	ES CLIENTS			UNEMPLOYED in 2011		
EDUCATION LEVEL	Board area	Northern	Ontario	Board area	Northern	Ontario
No certificate	21.0%	25.3%	13.4%	23.2%	21.1%	17.9%
High school	29.3%	32.5%	29.6%	29.3%	33.5%	34.7%
“Other”	10.1%	8.9%	7.2%	1.8%	1.9%	3.8%
College	31.8%	26.4%	27.1%	33.1%	31.9%	24.0%
University	7.8%	7.0%	22.6%	12.5%	11.6%	19.6%

“Other” refers to those with a university diploma less than a Bachelor’s degree. Northern Region unemployed educational attainment data represents North Bay, Greater Sudbury, Elliot Lake, Temiskaming Shores, Timmins, Sault Ste. Marie, Thunder Bay and Kenora CMAs. WPSM Board area data represents Greater Sudbury CMA figures only.

ES CLIENTS BY LENGTH OF TIME OUT OF EMPLOYMENT/TRAINING:

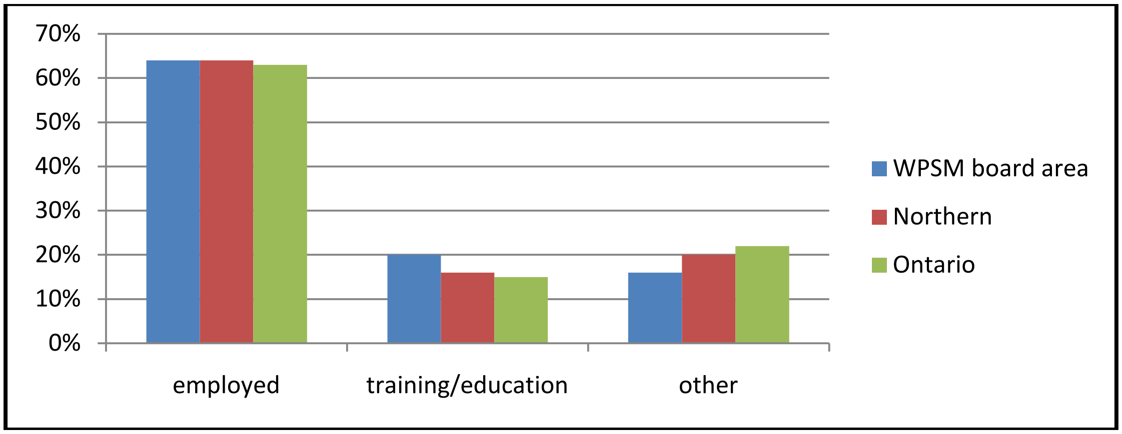
The following graph illustrates how long a client was out of employment or out of training at the time of intake and compares this to Ontario’s unemployment figures.



By and large, the distribution of ES clients by length of time out of employment or training is much the same between the WPSM Board area, the Northern region and the province. There are, however, two significant differences between these ES figures and the distribution of the unemployed in Ontario:

- Most ES clients in all areas and for those who are unemployed have been out of work or training for less than 3 months
- Numbers of ES clients slowly increase again across all three areas after someone has been out of work for more than 12 months

EMPLOYMENT SERVICES - ES CLIENT OUTCOMES AT EXIT:



The ES data indicates outcomes at exit for clients. The above chart compares the proportions in terms of these outcomes, between the WPSM Board area, the Northern Region and Ontario. The split in terms of outcomes is virtually identical across all three areas, with the WPSM Board area showing slightly higher numbers for training outcomes.

EMPLOYMENT SERVICES - ES CLIENT EMPLOYMENT OUTCOME BY INDUSTRY:

TABLE 17: ES CLIENT EMPLOYMENT OUTCOME BY INDUSTRY (NAICS)

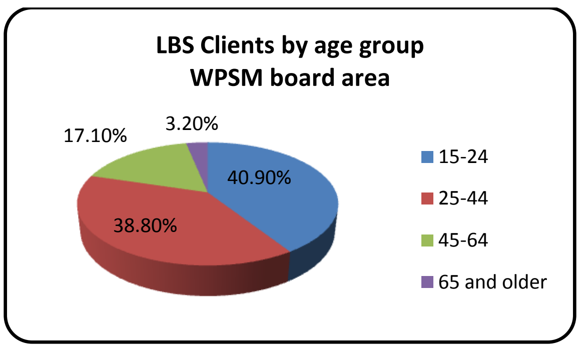
WPSM BOARD AREA		ONTARIO	
NAICS (highest to lowest)	%	NAICS (highest to lowest)	%
retail trade	18%	retail trade	16%
accommodation and food services	13%	administrative and support, waste management and remediation	12%
construction	11%	accommodation and food services	12%
healthcare and social assistance	9%	manufacturing	11%
administrative and support, waste management and remediation	9%	healthcare and social assistance	9%
public administration	7%	construction	7%
manufacturing	5%	other services (except public administration)	6%
transportation and warehousing	5%	professional, scientific and technical services	5%
other services (except public administration)	4%	transportation and warehousing	5%
mining, oil and gas extraction	4%	educational services	4%
educational services	3%	arts, entertainment and recreation	3%
professional, scientific and technical services	3%	wholesale trade	2%
wholesale trade	3%	information and cultural industries	1%
arts, entertainment and recreation	2%	public administration	1%
finance and insurance	1%	finance and insurance	1%
information and cultural industries	1%	real estate, rental and leasing	1%
real estate, rental and leasing	1%	agriculture, forestry, fishing and hunting	1%
agriculture, forestry, fishing and hunting	1%	mining, oil and gas extraction	0.4%
utilities	1%	utilities	0.3%
management of companies and enterprises	0.4%	management of companies and enterprises	0.1%

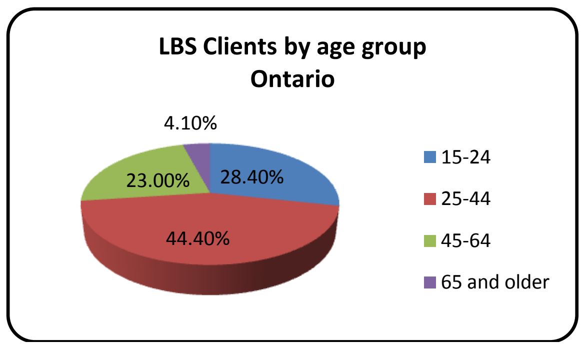
Table 17 compares ES client employment outcomes by the North American Industry Classification System (NAICS) for the WPSM Board area and for Ontario. These are ranked from highest to lowest and only include those clients who found employment. It appears however that most of the ES clients that became employed did not get hired into career-oriented jobs, but rather in retail, accommodation and food services, construction and other such industries in both the WPSM Board area and across Ontario. As part of a consultation with Employment Service Managers, they confirmed that many of the jobs that are found for their clients are 'survival-type' jobs and not so much career-oriented. Although it is difficult to draw any conclusions, this observation is particularly significant given that 49.7% of ES Clients in the WPSM Board area reported that they had completed college or university, or had completed a university diploma (less than a Bachelor's degree).

LITERACY AND BASIC SKILLS (LBS) – CLIENT DATA:

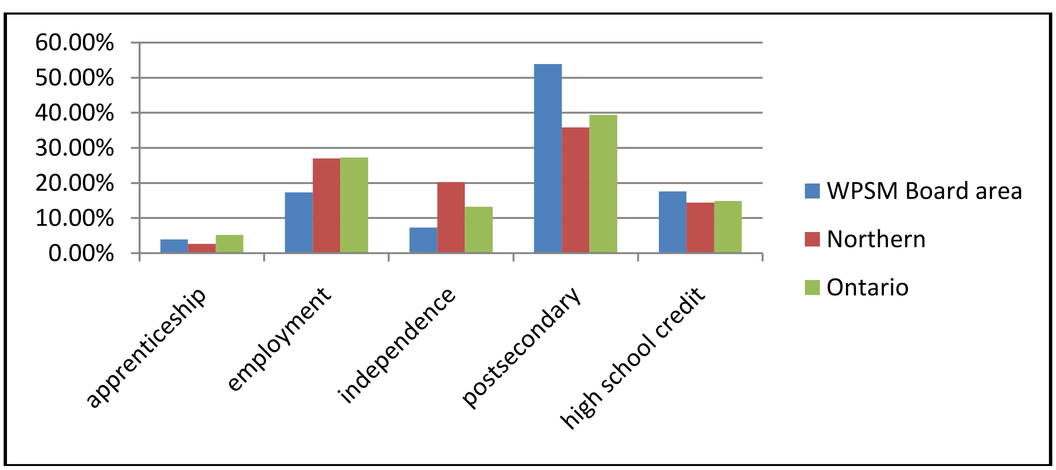
Literacy and Basic Skills Programs provide free training in reading and writing, math, and basic work skills to help clients reach their goals to upgrade their education or training, get a job, or become more independent. There are a number LBS services across the Sudbury & Manitoulin Districts and training is offered in various location (such as school boards, community agencies and colleges) and in various ways (tutors, one-on-one, small groups, etc.). *Taken from MTCU website at: http://www.tcu.gov.on.ca/eng/apprentices/lbs.html*

From April 2012 to March 2013, LBS service providers registered 1,121 clients in the WPSM Board area and 25,981 in Ontario. In the charts below, the most notable observation is that in the WPSM Board area there are a higher number of clients below 24 years of age (40.9%) when compared to Ontario at 28.4%. In both the WPSM Board area and Ontario however, the majority of clients are under the age of 44.





This may be a reflection of the Learner's goal path as noted in the graph below. It is interesting to note that the learner goal pathway in the WPSM Board area is focussed to a lesser degree on employment than those in



Northern Ontario and the rest of the province, and more so on obtaining a high school credit or onto some form of postsecondary education.

SECOND CAREER (SC) - CLIENT DATA:

The Second Career program provides laid-off workers with skills training or education to help them find jobs in high-demand occupations in Ontario. Second Career provides a grant to clients based on the needs of the client to help with tuition, books, transportation and basic living (allowance). *Taken from MTCU website at: http://www.tcu.gov.on.ca/eng/secondcareer/whatitis.html).*

In the WPSM Board area, in 2012-13, there were 355 clients and in Ontario there were 11,263 clients with the majority of them under the age of 44 in the Second Career program. Table 18 illustrates how long clients have been out of employment/training which is one of the criteria for eligibility in this program.

TABLE 18: LENGTH OF TIME OUT OF EMPLOYMENT/TRAINING FOR SECOND CAREER CLIENTS 2013-14

LENGTH OF TIME	WPSM BOARD AREA		NORTHERN		ONTARIO	
	Number	%	Number	%	Number	%
Less than 3 months	160	45.1%	519	46.1%	3,598	31.9%
3-6 months	66	18.6%	203	18.0%	1,927	17.1%
6-12 months	48	13.5%	163	14.5%	2,331	20.7%
More than 12 months	47	13.2%	155	13.8%	2,460	21.8%
Time out unknown	34	9.6%	86	7.6%	947	8.4%
Total	355		1,126		11,263	

This data seems to indicate that clients enter Second Career at different times. In the WPSM Board area and the Northern area, the highest numbers of clients enter the program when they have been out of work for less than 3 months. This is similar to the Ontario data though to a lesser degree. All other categories, with the exception of "time out unknown" are reasonably similar in terms of number of clients.

As noted, Second Career is focussed on high-demand occupations. Table 19 provides a breakdown of the top 10 approved skills training programs by area for 2012-13 in the Second Career Program.

TABLE 19 – TOP 10 APPROVED SKILLS TRAINING PROGRAMS FOR 2012-13 IN SECOND CAREER

WPSM BOARD AREA	ONTARIO
Heavy equipment operators (except crane)	Transport truck drivers
Transport truck drivers	Social and community service workers
Home support workers, housekeeper and related occupations	Heavy equipment operators (except crane)
Underground production and development miners	Accounting and related clerks
Welders and related machine operators	Early childhood educators and assistants
Social and community service workers	Home support workers, housekeepers and related occupations
Geological and mineral technologists and technicians	Medical administrative assistants
Receptionists	Computer network technicians
Accounting and related clerks	Paralegal and related occupations
Construction millwrights and industrial mechanics	Welders and related machine operators

APPRENTICESHIPS – CLIENT DATA:

The Canadian Chamber of Commerce has stated that by the year 2020, Canada will be short one million skilled trades people (The Canadian Chamber of Commerce, 2012). This is in part due to: an aging workforce nearing retirement, lower Canadian birthrates, few youth entering the trades and underrepresentation by women and Aboriginal people.

While efforts continue to focus on addressing this forecasted shortage, according to MTCU's apprenticeship client data for the WPSM Board area, there were: 1,215 new apprenticeship registrations, 4,794 active apprentices and 10,531 active journeypersons in 2012-13 and that the average age of an apprentice at registration was 26. Although it is hard to understand why the average age is so high, it may mean several things: those entering the trades go in after they have already been out in the workforce or attended post secondary education or both; or it could be a sign of how difficult it is to secure an employer for the experiential portion of the apprenticeship. It is important to note once again, that one of the greatest challenges to completing an apprenticeship continues to be the lack of employer commitment. Apprentices require a set number of hours of supervised experiential learning for their trade in order to write their Certificate of Qualification and eventually practice as a certified journeyperson. Table 20 identifies the top 10 trades for active journeypersons and the top 10 trades for new registrations for 2012-13 in the WPSM Board area.

TABLE 20: TOP 10 TRADES FOR ACTIVE JOURNEYPERSONS AND NEW REGISTRATIONS IN THE WPSM BOARD AREA 2012-13

ACTIVE JOURNEYPERSONS	NEW APPRENTICESHIP REGISTRATIONS
Automotive service technician	Heavy duty equipment technician
Industrial mechanic millwright	Industrial electrician
Heavy duty equipment technician	Industrial mechanic millwright
Electrician construction and maintenance	General carpenter
Industrial electrician	Automotive service technician
Truck and coach technician	Truck and coach technician
Hairstylist	Welder
General carpenter	Electrician construction and maintenance
General machinist	Powerline technician
Plumber	Hairstylist

SERVICE PROVIDER CONSULTATIONS:

As noted earlier, since the raw data and above comparisons only tell part of the story, all workforce planning boards were asked to meet with providers in the following services: Employment Services; Literacy & Basic Skills; Second Career and Apprenticeship programs. In the WPSM Board area, all managers from these programs were invited to review the data, share their perspectives and make recommendations.

OBSERVATIONS:

In reviewing the data, most managers felt the data was a fair representation of their assisted clients. Youth under 24 continue to be of particular concern and that there are two specific observations: youth either need upgrading to get a job or go back to school, or they have a postsecondary diploma or degree and can't get a job. Both categories are concerning particularly when they represent almost 30% of clients in employment services. Some felt that the Youth Employment Fund might help, but it was more of a wait and see approach.

Concerns were also expressed (as noted in the limitations), that the data only reflects clients that enter and exit the system in a one year period and does not include the number of open files (where a client has not yet left the system). They felt that one of the shortcomings of this type of reporting is that it is focussed on quantitative data (counting numbers which is tied to funding) and not qualitative data (the reasons behind the numbers). For example, those that remain in the system may have lower literacy rates, a disability, etc. and may require more time, effort and support to exit the system or achieve identified milestones.

Additionally, as noted, the data does not reflect the number of people that simply make use of the resource centres that are available. While staff does engage these individuals to assess their needs, often these individuals are visiting to look at the job board, request assistance with their resume, or need help with an online application and as a result, are never registered as a client. One person may come in multiple times and one service manager noted that in their storefront operation, they may have anywhere from 400-600 visits per month. Short-term activities such as a one-time workshop or training event are also not captured in this data.

Some service managers indicated that the current system in Ontario is sometimes unable to accommodate individuals with various challenges or those that only need a very specific short-term program. Everyone agreed that the system requires more flexibility to offer funding for short-term programs geared towards a specific job (i.e. math upgrading) as opposed to entering a longer term program such as college. On the flip side, managers also concurred that others may need increased time and support for higher level literacy programs and upgrading (such as physics or English). This is particularly relevant for those with a range of disabilities as it may take more time to get through these programs.

Access to the range of services in rural/remote service areas continues to be of concern. Clients in these areas often lack transportation or funding supports (childcare, etc.) to attend programs offered in more populated centres. Additionally, online programs/services do not meet the needs of those who have low literacy skills, low-level computer skills, no computer and/or no internet access (due to cost, location, etc.). Since some of the WPSM Board area falls into this category (rural and some remote), it was identified as a significant concern.

Last, in looking at employment outcomes, while there are some exceptions, when clients transition to the workforce, most employment opportunities tend to be 'survival jobs' as noted and not so much career-oriented unless returning to school. These jobs help with daily living, but they are hard to make a good living.

RECOMMENDED ACTIONS:

All service managers were asked to consider recommendations to improve outcome. Some specific service recommendations will be made to MTCU, but the following are areas where there is general consensus:

- while individual services do meet on occasion, all agreed that it would be good to meet on a semi-annual basis to network, share ideas, programs changes and new resources, etc.;
- there is a need to develop a marketing/awareness campaign about EO services available to: engage job seekers earlier; help employers better understand EO services and how they can help (job postings, match with clients, etc.); provide outreach to outlying communities and rural areas; inform other agencies about their services; and increase opportunities for collaboration;
- they would benefit from increased knowledge about the Ontario College of Trades;
- it would be beneficial to have: increased knowledge about labour market trends and existing data; support for sharing employer databases and job postings; collaboration (as the system competes for funding); support and flexibility for the employment pathway and the college pathway; mechanisms and tools to provide qualitative client information; and flexibility in client funding criteria;
- rural/remote challenges need to be strategically addressed to ensure everyone has access to services;
- many new programs are only funded on a pilot basis, and once that term is complete, funding is no longer available - need to find mechanisms to continue funding for programs that are successful;
- to help mitigate challenges faced by some apprentices, it might help to have all apprentices complete a literacy assessment to identify any upgrading needs prior to entering the apprenticeship pathway.

ACTION PLAN UPDATE

Strategic Priority #1: facilitate integration of basic and essential skills, career pathways resources and workforce data into local labour market-related initiatives

STATUS & ACTIONS	LEAD & PARTNERS	TIMELINES	OUTCOMES
Collaborate with Greater Sudbury's *Learning City* (LC) initiative to support their strategic plan			
PAST ACTION: Learning City (LC) Continue as member of LC and redesign former "Career Destinations" resource to a web-based resource. This moved to a partnership project for 2013-14 and WPSM'S Education Coordinating Team will vet content and accuracy **STATUS** delete action/partnership related to "Career Destinations" - no longer required as Ministry of Education is launching new online resource (Career Cruising) to support new IPP (Individual Personal Plan) initiative for students **ACTION:** continue to support LC's workforce-related activities	**LEAD:** Learning City & WPSM **SUPPORTED BY LC PARTNERS:** GSDC; Police; Social Planning Council; City Council; Leisure Services; Social Services; all post-secondary institutions; YPA; SAMSSA & others	Delete Ongoing	See status. Shared information with others re: Ministry of Education's new IPP initiative Increased labour market knowledge by LC members
Support efforts of the Social Planning Council's Pathways to Employment Pilot Project			
PAST ACTION: Social Planning Council (SPC) Provide LMI data and participate in project-related discussions/activities led by SPC for the Pathways to Employment pilot project targeting those most distanced from the workforce (MTCU funded) **ACTION:** Support SPC in effort to obtain additional funding for 2nd phase of project	**LEAD:** SPC **PARTNERS:** WPSM; SAMSSA; Construction; EO Service Providers; Social Services and others	Complete Fall 2014	Contributed to project (data, contacts, meetings) to help identify cluster and connector organizations (WPSM was identified as a connector org) Continued support to phase 2 if funded

Strategic Priority #2: promote current/forecasted in-demand skilled professions & trades

STATUS & ACTIONS	LEAD & PARTNERS	TIMELINES	OUTCOMES
Highlight the importance of key sectors that are underrepresented as a destination workplace			
PAST ACTION: agriculture support Early discussions with Collège Boréal, OMAF, local agriculture contacts, GSDC and University of Guelph to determine research collaboration opportunities and strategies for engaging youth. **ACTION: agriculture study** The Labour Market Group/North Bay (LMG) was successful in securing funds. WPSM will discuss use of their model and collaboration opportunities to study industry, networks & rural youth engagement. Economic development tools and opportunities will also be explored **PAST ACTION: tourism** Discussed collaboration with RTO13 however they were still articulating priorities and actions. **STATUS:** Since RTO13 covers northern Ontario, decision made to use only one northern planning board (North Bay) as primary contact with the RTO13. No further action required at this time. **ACTION: renewable energy** Presented to GreenX2 conference for First nations	**LEAD:** WPSM **POTENTIAL PARTNERS:** Collège Boréal; OMAF; Local farmers/producers; LAMBAC; Eat Local Sudbury; GSDC; University of Guelph; Laurentian University **CO-LEAD:** RTO13 & LMG **POTENTIAL PARTNERS:** WPSM support and input as needed. **LEAD:** Manitoulin Wind and Solar Institute	Ongoing May 2014 As needed Complete	Continued exploration of possible partners and interest in this issue. Partner database resources and activities. Application for special funding (MTCU) to support study and agri-based economic development forum WPSM interviewed by RTO13 consultant and shared local data and contacts to help inform workforce priority Identified need to integrate workforce development

leaders across Ontario on labour market issues. Attended by over 100 leads from various First Nations communities, government, private industry and Aboriginal organizations. **PAST ACTION/PARTNERSHIP: promoting need for experienced skilled trades (video)** Due to various challenges, final editing and release was delayed. **STATUS:** Nearing completion. Next steps will include public release, positioning video on various websites and use at talent attraction events.	 **LEAD:** GSDC; 50 Carleton & WPSM **SUPPORT:** Various mining and mining supply services companies (to film staff in action on location)	 November 2013	component into the First Nations Renewable Energy Strategy to address projected skills shortages A video promoting the need for experienced skilled tradespersons in 8 high demand trades in the mining industry (based on mining HR study)
Support efforts to encourage employers to hire internationally trained workers			
ACTION: Skills Taskforce Participate on Chamber of Commerce Skills Taskforce which includes supporting various actions on immigrant worker attraction & retention strategies; **ACTION: Professions North** Enhance WPSM Board with Professions North member to increase understanding of immigration issues; difficulties with credentialed professionals and attraction strategies	**LEAD:** Chamber of Commerce **PARTNERS:** Chamber Skills Taskforce members **LEAD:** WPSM & Professions North	Ongoing (not time limited) Complete	Chamber action to plan to address recruitment and retention of internationally trained workers and connection to local industry Professions North representation on WPSM Board of Directors (3 year board term)
Support other efforts to increase capacity to address projected shortages in skilled trades and professions (new)			
ACTION: women in non-traditional trades Continue with: a) development of logic model plan/strategy on women in non-traditional trades (with women in skilled trades, employers, educator/trainers, government and others); b) identify areas that WPSM can lead; c) support summer skills camp for girls **STATUS:** logic model plan has been moved to a partnership and other actions are continuing **PAST ACTION: Greater Sudbury - Mayor's roundtable discussions** Support Mayor's efforts to address labour recruitment and retention **STATUS**: this action can be deleted	**CO - LEADS:** WPSM & Rainbow Board **PARTNERS:** Women in trades; leads in education; trades industry; government; OYAP; **LEAD:** Mayor's office **PARTNERS**: WPSM; GSDC; postsecondary; SAMSSA; SCA; Chamber; mining industry, health, etc.	Continuing March 2014 Complete	Logic model plan developed and includes: plan elements; current activities; identification of leads for various elements; skills summer camp highly successful This action led to a new project to collaborate/host a Sudbury event with Collège Boréal and the Provincial Women`s Access to Trades Network Several meetings chaired by Mayor to examine City's role re: workforce issues; scan of workforce-related activities and identification of key sector leads
Cultivate the growth of the cultural design industry			
ACTION: design cluster exploration Continue discussions to determine interest in increasing the cultural design industry network – cluster growth	**LEAD:** WPSM **POTENTIAL PARTNERS:** INORD (Laurentian U); GSDC; Colleges; and businesses in the industry	Ongoing	Early discussions. Develop database of industry businesses. Form a committee to explore growth opportunities and labour market demand
Support efforts highlighting the value of a career in mining industry			
PROPOSED ACTION: Dynamic Earth Support efforts to improve image of mining **STATUS**: delete this action as there was no direct action involvement **ACTION:** Modern Mining & Technology Week (MMT) support activities which provide students with experiential learning opportunities; **PROPOSED ACTION: Explore for More** Collaborate with Northern Planning Boards to	**LEAD:** Dynamic Earth **LEAD:** MMT **PARTNERS:** SAMSSA; SCA; mining; school boards; university; and others **LEAD:** Superior Planning Board	Delete Annual event each May	No request to contribute Successful implementation of Modern Mining and Technology; WPSM in-kind and financial support Resources to promote mining careers with the Explore for More

assess potential activities and resources related to the Explore for More branding to promote mining careers	**PARTNERS:** all planning boards in the north	Ongoing	branding

Strategic Priority #3: support identification of market demands & contribute to workforce profiles and forecasts

STATUS & ACTIONS	LEAD & PARTNERS	TIMELINES	EXPECTED OUTCOMES
Support formation of data consortium and accessible local labour market website			
PAST ACTION: Data consortium WPSM hosted initial meeting of local organizations that collect labour market data to discuss sources and opportunities to share data **STATUS:** Social Planning Council hosted subsequent discussion to determine how a consortium could operate – partnerships developed	**CO-LEADS:** Social Planning Council; WPSM; INORD **POTENTIAL PARTNERS:** Post-secondary institutions; GSDC; Regional Business Centre; Economics department – Laurentian University; Social Services and others	Continuing	INORD (Economics Dept. from Laurentian University) to host site; GSDC has provided some initial funding; model for sharing data developing; WPSM and others will oversee this action, provide data and contribute to the site and awareness/use of the data
Collaborate on completion/dissemination of a northern Ontario mining human resources forecasting report			
PAST ACTION/PARTNERSHIP: Mining HR Study Conducted mining HR study to forecast workforce needs in mining and mining supply services sectors in collaboration with Mining Industry Human Resources Council – (study replicated throughout northern planning boards)	**LEAD:** WPSM and Mining Industry Human Resources Council **PARTNERS:** GSDC; Colleges; MTCU (as a funder)	Report complete	A report that identifies HR needs in the local mining and mining supply services sectors – available on WPSM website
ACTION: mining HR study dissemination Continuing to disseminate the results, however a sharp drop in global nickel prices has significantly impacted on interest in mining industry HR issues. Will continue to provide results to industry, supply sector, educators and employment services	**LEAD:** WPSM	Ongoing	Continued media coverage and dissemination of report
PROPOSED ACTION: roll-up northern report Exploring options to compile all northern mining HR study data into one northern Ontario report **STATUS**: pending funding	**LEAD:** Far Northeast Training Board **CO-LEADs:** All northern workforce planning boards	March 2014	A northern Ontario mining HR report of projected need, available talent and recommendations

Strategic Priority #4: support alignment of training/education with changing local skill demands/requirements

STATUS & ACTIONS	LEAD & PARTNERS	TIMELINES	EXPECTED OUTCOMES
Collaborate on initiatives to promote experiential learning opportunities (apprenticeship and co-op)			
PAST ACTION: campaign – promote trades Developed a promotional campaign targeted at parents and students on the benefits of the skilled trades **PROPOSED ACTION: promote skilled trades** Continue with above efforts and build on past actions and engage other media	**CO -LEAD:** WPSM; Education Coordinating Team; Northern Life newspaper; employers; and other media	Ongoing	Increased understanding by parents, teachers and students re: skilled trades jobs; increased employer involvement; increased student enrolment in skilled trades programs. Efforts have resulted in media articles and interviews (on radio and television), advertising and guest columns in student focussed magazines

SUMMARY COMMENTS

This Local Labour Report marks a departure from previous years. This report examines what data is available in terms of industry changes using Labour Market Indicators (demand side) and assisted client data from various Employment Ontario programs (the supply side). This data is supplemented by consultations with a wide range of industry, government, education and employment stakeholders. What is important to remember here is that no one has a crystal ball to forecast what will happen in the future of our Districts. Sometimes we are at the mercy of global, national, provincial and district policies, shifts and changes that are often out of our control – these can both positively and negatively impact on how our industries grow, the skills of the people available for employment and the number of people that are employed.

What we are in control of is how we respond to these trends and some of the emerging workforce themes we discussed in our February 2013 labour report. While things have not changed a great deal in the last six months, it is important to remind us all that we have work to do.

Just to summarize we have:

1. Projected skilled trades' shortages due to a number of factors: near-retirement aged workforce; few youth entering the trades; high apprenticeship-journeyperson ratios (some of the highest in the country); few women and Aboriginal people entering the trades; stigma surrounding the trades; and limited apprenticeship opportunities for those who want to study in a trade and become a certified journeyperson.
2. Shortages in highly skilled professionals in various industries including mining and health. While some are beginning to address this need, we have reached a critical stage with some professions that are in demand across the country and in some cases globally. For example, as our population ages, the demand on specialized healthcare services will increase in areas such as nursing.
3. There continues to be a disconnect between education programs that are offered and jobs that are available. For example, we continue to graduate far too many teachers with no job prospects in Ontario. Balancing out our future needs requires us to step back and look at the big picture, not just the number of students that continue to graduate but to look at the number of students who graduate and can/can't get a job in their field...this will be a far more telling story.
4. In some areas, we have trained and/or experienced people but no jobs available. This is a difficult one as job mobility is impacted by a number of factors such as family responsibilities, income, etc. Other provinces such as Alberta are looking to Ontario to entice these skilled and trained people due to their labour shortages.
5. Lack of basic and essential skills in the workforce continues to be a problem that LBS providers are trying to remedy. The issues are complex and impact on both the employer looking for specific skill-sets and the job-seekers' ability to do certain jobs.

These issues are not new issues, and in fact, some of these were quite predictable. Equipping ourselves with the data and evidence from other sources will help us to find those key policies, strategies, and interventions needed to better bridge some of the current gaps between education/training and meaningful employment. WPSM is committed to continuing to work with industry, government, education and employment leads to initiate efforts to minimize these gaps and mitigate some of the pressures that impact on both employers and employees now and into the future. Only together can we make any real change, but we still have a very long way to go.

Participating Stakeholders

Government:
Employment Ontario Services (MTCU)
Greater Sudbury – Mayor & City Council
NOHFC
Ontario Ministry of Agriculture & Food
Service Canada

Labour:
Various unions/locals
Sudbury & District Labour Council

Associations:
MiHR
Northeast Regional Tri-partite
Ontario Construction Secretariat
SAMSSA
Sudbury Construction Association

Aboriginal Organizations:
Gehtzoojig Employment and Training
Kenjgewin Teg Educational Institute
N'Swakamok
M'Chigeeng First Nation

Training, Education and Employment:
Cambrian College
Collège Boréal
Conseil scolaire de district catholique du Novel-Ontario
Conseil Scolaire de district du Grand Nord de l'Ontario
Employment Support Services
Laurentian University
Learning City Initiative (Greater Sudbury)
NORCAT
Mid North Literacy
Professions North
Rainbow District School Board
Sudbury Catholic District School Board
YMCA Employment Services

Disabilities:
Accessibilities Office, Laurentian University
Independent Living Sudbury Manitoulin

Economic Development/Business:
Greater Sudbury Development Corporation
Institute for Northern Ontario Research & Development (INORD)
LAMBAC
Regional Business Centre - Greater Sudbury
Sudbury Chamber of Commerce

Health & Social Services:
Health & Safety Centre
Manitoulin – Sudbury District Services Advisory Board
March of Dimes
Ontario Works
Social Planning Council
Sudbury Vocational Resource Centre

Immigration:
Local Immigration Partnership
Professions North/NORD
YMCA - newcomer services

Industry/sectors:
Finance
Hospitality & Tourism
Independent business owners & contractors
Mining companies
Mining supply services
Real Estate
Retail
Stylists
Health

Media:
CBC
Northern Life
Sudbury Star

Tourism:
Science North
Regional Tourism Organization

COMMONLY-USED TERMS

EO:	Employment Ontario
GSDC:	Greater Sudbury Development Corporation
INORD:	Institute for Northern Ontario Research & Development
IPP:	Individual Personal Plan (Ministry of Education)
KTEI:	Kenjgewin Teg Educational Institute
LAMBAC:	LaCloche Manitoulin Business Assistance Corporation
LBS:	Literacy and Basic Skills
LC:	Learning City Initiative (Greater Sudbury)
LHIN:	Local Health Integration Network
LIP:	Local Immigration Partnership
LLMP:	Local Labour Market Plan
LMI:	Labour Market Indicators
MNDM:	Ministry of Northern Development & Mines
MOHLTC:	Ministry of Health & Long Term Care
MTCU:	Ministry of Training, Colleges and Universities
NAICS:	North American Industry Classification System
NOC:	National Occupational Classification
NOSM:	Northern Ontario School of Medicine
OMAF:	Ontario Ministry of Agriculture & Food
OYAP:	Ontario Youth Apprenticeship Program
RTO:	Regional Tourism Organization
SAMSSA:	Northern Ontario Mining Supply and Services Association
SHSM:	Specialist High Skills Major
SME:	Small and Medium Enterprises
SPC:	Social Planning Council
WPSM:	Workforce Planning for Sudbury & Manitoulin
YEP:	Youth Employment Fund

LIST OF TABLES:

REFERENCES:

Campbell, Heather. **NORCAT delivers health and safety training to Kenya.** Sudbury Mining Solutions Journal. August 13, 2013.

CBC News. **Xstrata-Glencore merger prompts name change.** August 6, 2013.

Gasparini, Janet. **Pathways to Employment.** Project discussion. September 2013.

Gregorini, Laura. **Making movies: lights, cameras, jobs.** Sudbury Living Magazine. February 20, 2013.

Labour Force Survey for Ontario, 2012,

Laurentian University. **Laurentian University to Lead Unique $12m Research Project.** Laurentian University. News release. At: www.laurentian.ca/content/laurentian-university-lead-unique-12m-research-project. May 14, 2013.

MacDonald, Darren. **FedNor invests $350K to help stem youth outmigration.** Northern Life. August 16, 2013.

Migneault, Jonathan. **School of Architecture Gives new 'voice'.** The Sudbury Star. September 14, 2013.

Ministry of Northern Development and Mines. **Province Launches Northern Policy Institute.** August 31, 2012.

Ministry of Training, Colleges and Universities. **Apprenticeship.** Employment Ontario data. July 31, 2013.

Ministry of Training, Colleges and Universities. **Employment Service.** Employment Ontario data. July 31, 2013.

Ministry of Training, Colleges and Universities. **Literacy and Basic Skills.** Employment Ontario data. July 31, 2013.

Ministry of Training, Colleges and Universities. **Literacy and Basic Skills.** At: *www.tcu.gov.on.ca/eng/apprentices/lbs.html*

Ministry of Training, Colleges and Universities. **Second Career.** Employment Ontario data. July 31, 2013.

Ministry of Training, Colleges and Universities. **Second Career.** At: *www.tcu.gov.on.ca/eng/secondcareer/whatitis.html*

Ministry of Training, Colleges and Universities. **Youth Employment Fund.** At: www.tcu.gov.on.ca/eng/employmentontario/youthfund/

Mulligan, Carol. **Vale Faces 'new world.'** The Sudbury Star. April 15, 2013.

Northern Ontario Business. **Feds fund Ring of Fire alliance.** August 9, 2013.

Northern Ontario Business staff. **Vale cuts Sudbury smelter to single furnace.** Northern Ontario Business. January 11, 2013 at: www.northernontariobusiness.com

Perth, Sebastien. **Sudbury contractors feeling bullish.** Sudbury Star, May 2, 2013.

Reuters and Star Staff. **Vale mulls hedge tactic.** The Sudbury Star. August 9, 2013.

StatCan CANSIM Table 282-0002

StatCan CANSIM Table 282-0004

Sudbury Northern Life Staff. **Northern Policy Institute appoints founding president.** July 5, 2013.

Sudbury Northern Life Staff. **Shelter animals focus of revamped Vet Tech program.** Northern Life. May 7, 2013.

The Canadian Chamber of Commerce. **Canada's Skills Crisis: What We Heard – A Canadian Chamber of Commerce report on Cross-Country Consultations in 2012.** 2012.

The Sudbury Star. **Making health research happen in Sudbury.** July 31, 2013.