ecotb
east central ontario training board

March 2011

TOP ACTION PLAN UPDATE

a member of
Workforce Planning Boards

Champions of Ontario's Local Labour Market Solutions

Mission Statement - *We build positive and lasting collaborations to identify community need, facilitate solutions, and advocate for the development of a skilled, inclusive and adaptive labour force in the counties of Prince Edward, Hastings and Lennox & Addington.*

The East Central Ontario Training Board (ECOTB) is part of a Local Board Network, comprised of 21 Local Boards across Ontario. ECOTB is governed by a volunteer board of directors and has a jurisdiction of Hastings, Prince Edward and Lennox & Addington counties.

This Action Plan Update to the 2010 Trend's Opportunities and Priorities (TOP) report is funded by the Ministry of Training, Colleges and Universities as part of an agreement with ECOTB to conduct local labour market planning and partnership development as a means to address local challenges and priorities in the region. The report provides an update on the issues and activities related to labour force, the population and local industries and occupations.

The Government of Ontario funds this Employment Ontario project. The views expressed in this document do not necessarily reflect those of Employment Ontario.

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Executive Summary

This Action Plan Update forms part of an overall strategy to develop and implement 'evidence-informed' planning and activities that address local labour market challenges. It combines external information in the form of data analysis and research, with local experience, judgement and expertise to develop new and report on existing 'strategic actions' in response to identified community priorities.

This document is a companion to the 2010 Trends, Opportunities and Priorities (TOP) Report. The 2010 TOP report developed a Base Profile of the region using 'Local Labour Market Indicators' derived from a variety of data sources, including: the Census (2001 and 2006), Canadian Taxfiler, Labour Force Survey, Canadian Business Patterns Survey and the Ontario Labour Market Adjustment Data. This Update Report revisits these indicators with more current data from the 2010 Canadian Business Patterns Survey and 2008 Canadian Taxfiler.

While ECOTB makes every effort to access the most current data, data by its nature is dated, some more than others. As a result, the recent downturn in the economy may not be fully represented in these data sets. This statistical picture of the region provides a focus and context for the local community consultation process.

This report continues to focus on Small and Medium Enterprises (SME), those companies with under 100 employees. Their smaller size means that they often need, and can benefit from labour market initiatives.

Over the past several months, ECOTB has met with local employers to hear their perspectives on the challenges and opportunities that their industry is currently facing and what the future may hold. We have also met with the local Economic Development Offices, Community Employment Services Providers and Temporary Employment Agencies.

The discussions with Economic Development offices, industry associations and others have identified a potential for growth in the Agri-food and Food Processing Sector. As a result, this Update focused on the 'Food Processing Sector NAICS 311 a subset of the broader Manufacturing Sector.

On behalf of East Central Ontario Training Board, a sincere Thank You to all of the employers, business owners, service providers and organizations who generously shared their time, observations and ideas.

Targeted Sector Analysis

There are many similarities in the labour force skill requirements and occupational profiles in both the Food Processing Sector and the broader Manufacturing Sector. Due to these similar job duties, education/training requirements and their transferable nature, there can be considerable opportunities for worker mobility between the sectors. As a result, a short overview of the Manufacturing Sector forms part of our research.

Manufacturing

This sector employs substantial numbers of skilled workers and faces a number of challenges. Firms in the Manufacturing Sector tend to be particularly important in rural areas. They often produce an exportable product, which means that the firm is not limited to selling its products or services in the immediate area. Consequently there is more potential to grow, since it is less constrained by the size and spending ability of the local population. However, this also makes them more vulnerable to global competition. Research shows a general movement towards firms developing more local and niche markets.

The Manufacturing Sector has been enduring relentless competition from low-cost off shore operations, escalating material and energy costs, an erratic loonie and the prospect of mounting costs associated with pending environmental policies and regulations. Although the worst of the economic downturn is supposed to be over, economists and analysts predict the recovery will be slow and gradual. A recent TD Bank report suggested growth over the next decade to average only 2% per year.

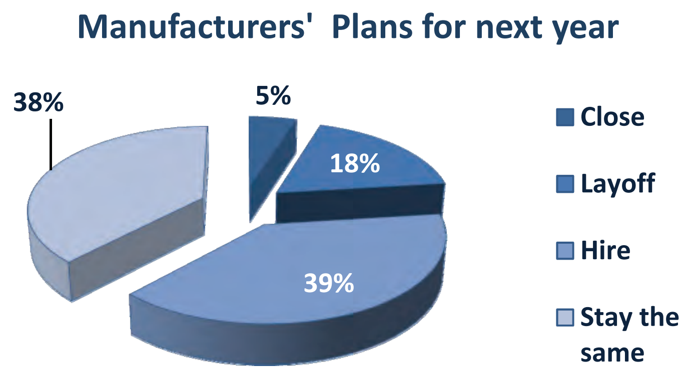
> *As the US dollar declines, the loonie inflates – with each 1% increase; manufacturing jobs on this side of the border are estimated to drop by $2 billion – the equivalent of about 25,000 jobs.*
> *Canadian Manufacturers & Exporters*

The National Scene

A recent national survey by PLANT – Canada's Industry Newspaper, Grant Thornton and the Italian Trade Commission showed manufacturers to be cautiously optimistic about their prospects, but mindful of changing business conditions. The majority are anticipating rebuilding lost revenue and discovering new revenue sources through innovation, new lines of business and partnerships.

There were 503 responses to this online survey with most (57%) being from Ontario and the majority (66%) were small manufacturers, employing less than 100 staff. This size range is very reflective of the local manufacturing sector.

These respondents indicated that they were expecting higher revenues, orders to increase and profits for the most part to increase or at least to hold steady. A small percentage (5%) planned to close within the year, and a further 18% anticipated layoffs. However, 39% intended to add new lines and hire more employees. While the remainder felt that they could 'stay the course'.



Source: Canadian PLANT Insights and Strategies for industry Leaders 'Outlook 2010 – Navigating the Recovery'

Manufacturers face a number of challenges, global competition, currency fluctuations, and market demands. These financial pressures become even weightier to smaller companies. Smaller companies often fail to recognize the importance of formal Sustainability and Risk Management Plans, less than half of those surveyed had a risk management strategy.

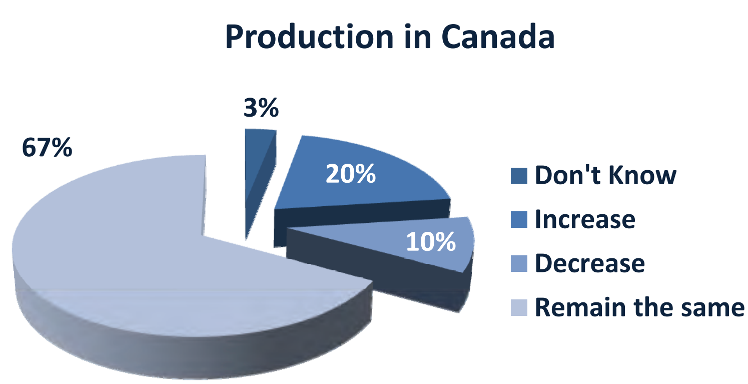
New Markets

More than one third of the survey respondents indicated that they intended to enter new markets in 2010. Most were in North America, the USA, Canada and Mexico respectively. However, many were thinking more globally, with Central and South America, Europe, India and China being most often cited. Entering the international marketplace is not a simple matter for medium and smaller sized manufacturers, they often lack the resources that the large manufacturers and multi-nationals have for overseas expansion.

The move to international markets has a number of labour force implications for training and recruiting, since many companies indicated that success in foreign markets often requires the local manufacturer's representative to speak the language of the target market country.

'Out-sourcing' versus 'Near-sourcing'

While many respondents were looking for exotic markets, the majority (67%) indicated that their Canadian production levels will remain the same. (See chart below) As logistics costs increase, many companies are taking a closer look at the challenges and costs of out-sourcing and considering 'near-sourcing' as more viable and cost effective. While foreign labour costs may remain relatively appealing, the associated outlay of managing a long



Source: Canadian PLANT Insights and Strategies for industry Leaders 'Outlook 2010 – Navigating the Recovery' supply chain, with increasing transportation costs and a fluctuating dollar has caused many to reconsider their supplier network. Not only is the economic stability of the country important but the 'political' stability must be considered prior to investment. Manufacturers that have a significant repetitive labour component continue to benefit most from labour outsourcing. However for many, technology and automation has greatly reduced this repetitive component of their labour force.

> *"Quality is going to be the feature that allows Canadian companies to survive in the face of stark competition from low labour cost countries."*
> *Paolo Ponti, Italian Trade Commission*

Going 'Green'

In this national survey, 64% of respondents agreed that not being green or environmentally sustainable was a risk to both their corporate brand and reputation, but only 16% viewed it as a priority for 2010. In fact, nearly a third viewed 'green' investments as a *cost* to the company. However the tide is turning, since 29% saw 'green' as an effective way to reduce costs. The Manufacturing firms that are 'going green' are creating demand for green specialists in a variety of occupations, including: managers, engineers, machine operators and labours to name a few.

Small and Medium Sized Enterprises (SMEs) will find funding support from the Federal Economic Development Agency for Southern Ontario to increase their productivity by means of LEAN manufacturing, energy efficiency and design improvement. The SMART program provides grants up to $50,000.

The increasing importance of being green is underscored by a trend in Request for Proposals (RFPs) that shows an increasing number containing questions related to the environment. Additionally, many employers agreed that employees prefer to work for a company that is viewed as environmentally responsible and/or offers 'green' products. It is also encouraging that for many, training and upgrading the skills of staff was rated only second to Process Improvement as an investment priority. The firms ranked the following in order of priority for the coming year:

1. Process Improvement
2. Training
3. R & D
4. Machinery / Equipment
5. Energy Efficiency
6. Plant Facilities
7. Advanced Technologies
8. Business Intelligence
9. Automation
10. Green Tech / Sustainability
11. No Investment Planned

Technology and Increased Productivity

Many economists have credited the adoption of Information and Communication Technology (ICT) as a key driver of productivity growth and wealth enhancement. This is underscored by the Statistics Canada research which indicates that firms using a greater number of advanced technologies experienced productivity gains. However Canadian SME's tend less than larger businesses, to draw upon this productivity enhancement. 'A significant percentage of SME's indicate that they have difficulty in seeing quantifiable benefits from their ICT investments. Other barriers include the lack of specialized staff and challenges in integrating new investments with existing systems'. *(Source: Enhancing the Productivity of Small and Medium Enterprises with Greater Adoption of Information and Communication Technology).*

A recent OECD study, *Does ICT Use Matter for Firm Productivity*, found that a firm that adopted a series of ICT factors realized a 12 percent higher productivity level than one that had not. However, for the ICT investment to be worthwhile the firms must also invest in financial and managerial resources to change production processes and train staff.

There is strong evidence to suggest a positive link between higher educational attainment and the successful adoption of technology. As a result for firms to realize a productivity 'return' on their ICT investment, they must focus their recruitment efforts on more highly educated/trained applicants, in addition to investing in upgrading the skills of their existing workers.

Targeted Local Sector Analysis

Food Processing NAICS 311

Agri-food / Food Processing Trends

Canadian agriculture and food industry are significant elements of our economy. Agri-food, particularly the food processing sector is a key contributor of jobs and a driver of economic activity. While Canada continues to enjoy the safest and most abundant food supplies in the world, there will be an increased scrutiny regarding food sourcing and food safety. This is in part due to improved testing technology that can find ever-smaller traces of bacteria or residues. For the food processing sector this means an increased focus on prevention, preparation and staff training to avoid these events, and the financial and public relations fallout associated with a food recall or an outbreak of food-borne illness. A recent survey of Canadian food and beverage processors indicated that over 50% had undertaken concrete measures towards improving food safety – either through process improvements or working towards a recognized safety certification.

> *'Agriculture is now being viewed by many, including major national media, as the solution for some environmental and energy issues and for improving our health and wellness. This means our sector will continue to be at the forefront of the national movement towards sustainability – this will provide new opportunities, as well as more scrutiny, for agriculture and food in 2011 and beyond."*
> *Rob Hannam, President of Synthesis Agri-Food Network*

This industry sector has shown a steady growth both in sales and employment at a time when many other manufacturing sectors have declined. However rapid increases in input costs and a higher Canadian dollar have tended to reduce the competitiveness of Ontario food products. In response, innovative food and beverage processors are building a bright future based on products that espouse health, quality, innovation, choice and value to consumers. Realizing this future will require closer relationships with supply chain members (farmers/food producers, retailers and consumers). Successful operations will enjoy competitive advantages by investing in innovation, research and development to reposition or differentiate their products. Those operations with products seen as being healthy, environmentally sensitive, and providing their customers with quality, variety and value will enjoy a growing demand based on increasing consumer expectations.

The Labour Force

Key to the success of the sector is a skilled and adaptive labour force. By most measures, the food processing industry's workforce generally has lower educational attainment compared to the general labour force. Over one quarter of the domestically born workers in the industry have less than a high school education with the largest occupation cohort being process / production labourers. (*Ontario Food Processing Industry Labour Study Summary*).

Retaining a qualified workforce can be a challenge, since some sectors within the food processing industry may present less than ideal working conditions. Some workplaces may require employees that are capable of performing repetitive motions, be able to stand for long periods, work in cold or heat, and/or noisy environments, in addition to being physically adept at heavy lifting. Also, split shifts and weekend work may be required to allow maximum production efficiency. These factors can contribute to employee turnover.

Turnover is an ordinary event in the workplace, however it becomes a problem when it is especially high and causes hiring and training costs to increase. Technological advances are reducing some of the requirements for repetitive manual labour, but in turn, require more specialized staff training.

Attrition is the general decline in the workforce due to retirement and resignation. Worker age is an important part of attrition. The average age of workers in the food processing industry is slightly higher than that of the general labour force and most industries will be impacted by the exit of 'Baby Boomer' workers. Many 'key' plant positions are filled by experienced, and typically older employees that have the training and expertise to solve line and equipment issues. Local firms will be wise to implement phased retirement schemes and mentoring programs to ensure the transfer of this critical knowledge.

Local Consultation

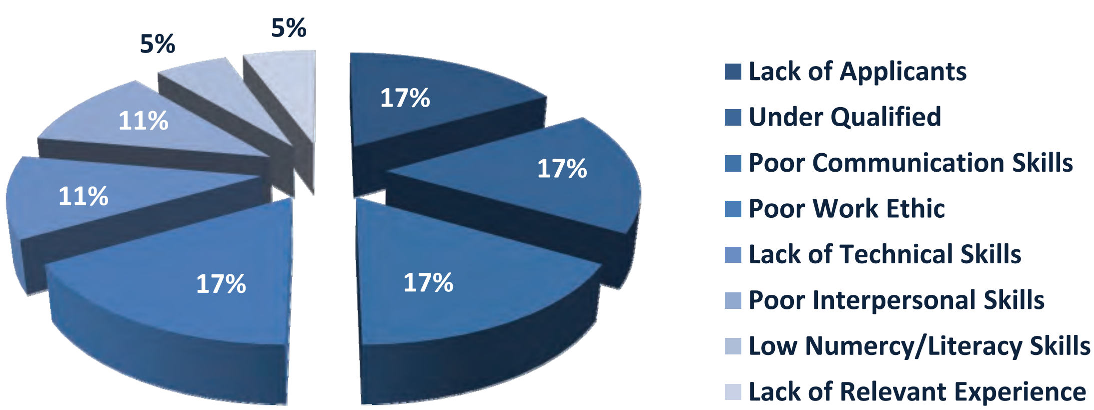
Local food processing firms were surveyed as to their labour force needs. The majority of respondents were in the 25 – 99 employee size range. The effects of an aging workforce is apparent, with nearly two thirds of the respondents anticipating employees to be retiring in the next twelve months, however, it is a promising sign that each firm indicated that they intended to replace these retirees.

There is a wide variety of employment opportunities within the food processing sector. Keeping a plant operational and competitive requires many skilled workers, including: engineers, scientists, chemists, laboratory workers, managers, quality controllers, and production workers. More than half of the employees of most plants are 'production workers' this includes: skilled precision workers, machine operators, labourers, shippers and receivers, inspectors, graders and sorters, to name a few. Many of the skill sets and abilities necessary to work in the food processing sector are highly transferable to other manufacturing firms. As a result, many firms risk having staff poached by their competition or employers in other sectors of the industry.

Similar to their national counterparts, 80 percent of the respondents were optimistic and as such, indicated that they intended to hire additional workers in the coming year. Of those firms hiring, all indicated that they would require Production workers. The other positions most often identified were: Engineers, Maintenance and Quality Controllers.

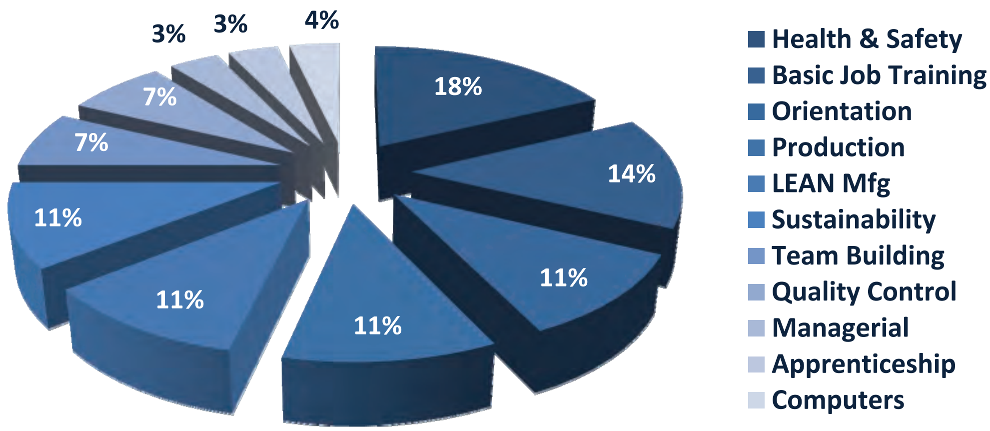
Staffing Issues

When queried about their staffing issues/challenges, local employers ranked four issues equally as being the most significant. These were: Lack of Applicants, Under Qualified Applicants, Poor Communication Skills and Poor Work Ethic. The lack of qualified and suitably engaged workers severely limits a firm's ability to expand and realize it growth potential. Next employers indicated that they were troubled by employees that Lacked Technical Skills and had Poor Interpersonal Skills.



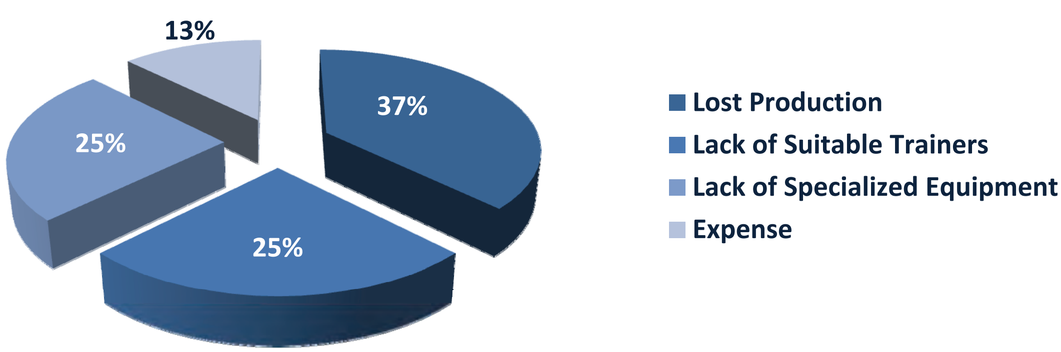
Employer Training

It is not surprising that local employers indicated that Health & Safety was their primary training focus. A recent provincial survey found similar results, employers in that study ranked food safety and workplace health and safety nearly twice as important as supervisor, machine operator, industry orientation and interpersonal skills training. Local firms next indicated that the training priority was Basic Job Training, followed by Orientation. The remaining training topics focused on Production, with the exception of Team Building. Few employers appear to be addressing the issues around 'poor work ethic', even though the majority of them rank it as a significant staffing issue.



Challenges to Providing Training

Employers were then asked to identify the most significant training challenges facing their organizations. Not surprisingly, the Loss of Production Time was ranked first. Small and Medium sized firms can feel the 'opportunity cost' of staff training time more acutely then their larger counterparts. Next, the local employers identified the Lack of Suitable Trainers and Specialized Equipment for Training as barriers to providing appropriate training. Finally they indicated the Expense of providing training as a barrier to their staff training. This cost factor also identified under 'Lost Production Time' underlines the fact that smaller firms often lack the resources both human and financial to undertake thorough and systematic training for their employees.

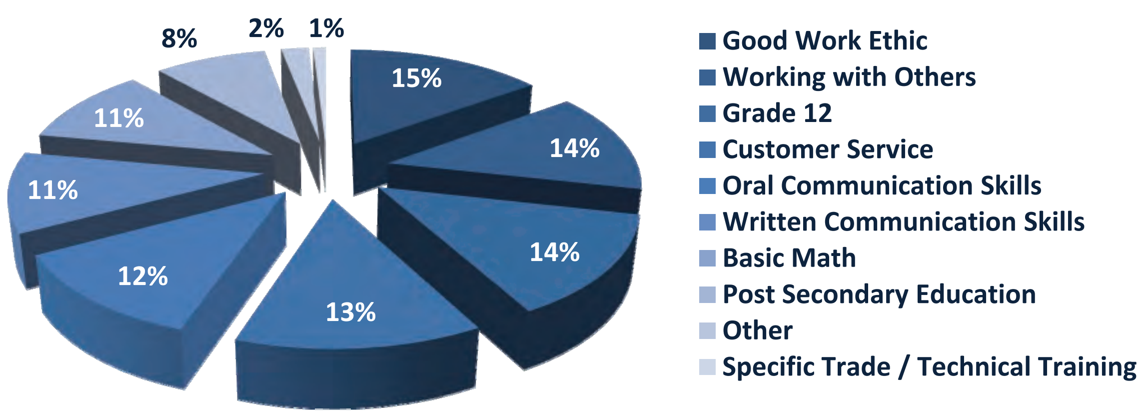


Community Employment Service Providers

Local Employment Service providers play an important role in connecting job seekers with local employers. Their experience and expertise provides insight into the skill requirements of local employers, the demand side of the labour equation. They also work closely with their Job Seeker clients to find them secure and meaningful employment. As a result they are acutely aware of the skills and training on the 'supply' side of the local labour force. Their responses assist in highlighting the gaps and/or mix-matches in the local skills supply and demand.

Skills Sought by Local Employers

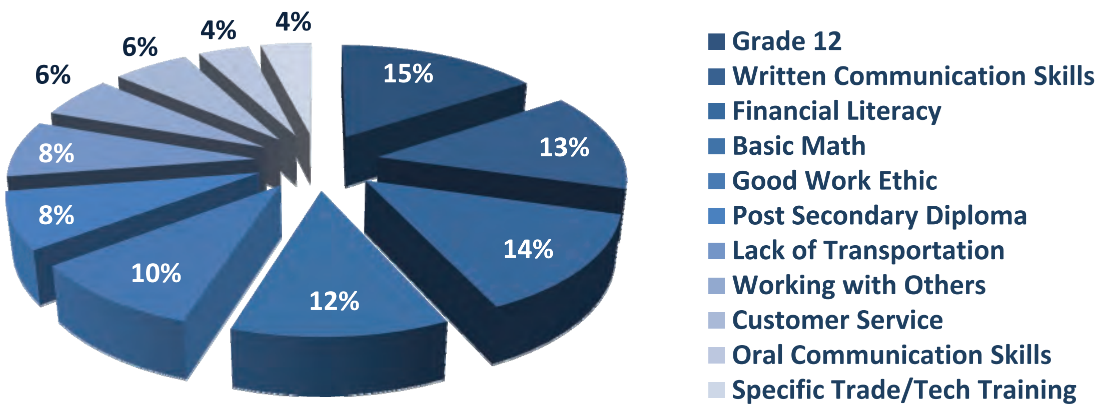
First, the job developers and employment counsellors were asked to identify the skills that local employers are seeking in their employees. The most often cited abilities were almost evenly ranked, and related to soft or work skills (Good Work Ethic and Working with Others). Next, they indicated that employers were requiring a High School Diploma as a minimum requirement. It is not surprising that Customers Service experience and Communication Skills, both Oral and Written were ranked highly as well.



Skills / Training the Job Seekers are Lacking

The Employment Service providers were then queried regarding the Job Seekers that they service. When asked what the main skills or training their clients were lacking, the majority indicated a Grade 12 diploma. This is particularly troubling, since this appears to be a minimum standard held by most local employers. As a result, low educational attainment can severely limit the employment options for these job seekers. This may reflect a relatively high rate of young people transitioning from high school to the workplace without their diploma, and/or it could indicate a cohort of older displaced workers trying to re-enter the labour force. The job seekers were lacking Written Communication Skills and to a lesser extent Basic Math, which could be indicative of their lower educational attainment.
Many indicated that these Job Seekers were lacking an understanding of Financial Literacy; the consequences of this deficiency can be profound for those on fixed or limited incomes. Many of the Employment Counsellors / Job Developers felt that they witnessed a lack of a 'Good Work Ethic' in

many of their job seeking clients. Again, not surprisingly this ethos was highly prized by employers. As a result, many of these job seekers become confused and discouraged by their cyclical unemployment, and the equally frustrated employers are incurring ongoing costs to recruit and train employees. Lack of Transportation was a significant factor limiting these Job Seekers ability to find steady employment. Transportation issues plague rural job seekers, restricting access to not only the numbers of jobs available to them, but the variety as well.



Labour Force and Training Implications

- An older workforce and subsequent retirements will continue to impact on the sector
- Negative perceptions of the workplace can adversely impact the ability of firms to attract suitable applicants
- Companies anticipating expansion into other countries should consider recruiting and hiring foreign trained and multi-lingual staff as representatives
- Being ‘green’ can have a positive impact on attracting skilled labour as well as reducing overhead costs
- Plant technologies have increased the demand for workers with strong math, analytical and literacy skills
- Employers are requiring related work experience even for unskilled positions
- Local unemployment and climate change point to the need for a green jobs strategy – there is tremendous potential to develop, good ‘green’ jobs
- Minimum requirement for job seekers is Grade 12 with post secondary education becoming increasingly sought after
- Proper training and certification of employees in food safety, safe food handling and prevention will become a necessary portion of every plant’s Risk Management Plan
- Literacy – oral, written and computer – is a necessity
- Positions such as, Production Workers, Machine Operators, Quality Controllers, and multi skilled staff will be in demand
- Increasing demand for ‘green’ specialists in a variety of occupations in the Manufacturing sector

2011-12 Priorities and Actions

The following represents only a partial listing of the activities being undertaken within our community. There are countless local innovative activities and initiatives related to: business attraction, expansion and retention, entrepreneurism tourism and social issues to name only a few. Many of which ECOTB actively promotes and supports. However, for the purposes of this Action Plan Update, the focus is on those actions that are directly related to the local labour force and its development. Many of these actions are noted as ongoing, since to have a significant impact, they will require a strong commitment and a number of years to realize results.

The Local Priorities and Actions are in response to identified local work force issues and challenges, such as:

- An older workforce*
- Slower population growth* (replacement workers)
- Higher out-migration of youth* (replacement workers)
- Lower educational attainment*
- Lower average annual employment income* (23.5% lower than the provincial average)
- Exceptionally low Self Employment Incomes* (regional average $11,379)
- Higher rates of Economic Dependency* (E.I., Social Assistance)
- Lack of current, specific local data

**in comparison to the provincial average*

It is clear, that for our community to prosper, we can ill afford to have significant numbers of the potential labour force that have little formal education, are unskilled, unemployed and underemployed. However there are many local community partnerships and actions that are addressing these labour force issues and there are increasing prospects to realize the economic, social and labour force training opportunities emerging with the 'Green Economy', particularly in the Manufacturing and Construction sectors. There is optimism locally that the local Agriculture, Agri-food and Food Processing sectors show growth potential.

Priority – Reduce youth out-migration and unemployment Encourage Youth to be more engaged in their education, community and the local workforce	
Goal	Improve the retention of youth in the region by assisting youth in developing stronger ties to both the community and the labour force.
Action	Foster relationships with local employers, universities, colleges and secondary schools to develop more internship opportunities, co-op placements, workplace tours and special events that allow youth to experience the range of career possibilities available locally.
Update	ECOTB and our community partners continue to encourage, support and facilitate experiential activities and career events that connect youth with local employers. A few examples events are TradeWise, Career Fairs, and Way to Work.
Action	Provide a supportive community that encourages and welcomes youth, with a focus on assisting youth at risk of leaving school without achieving their Grade 12 diploma.
Update	ECOTB supports such community youth programs as Alternative Centre Trenton (ACT) and Community for Innovative Thinking for Youth (CITY) that provide alternatives for youth to gather, recreate and continue their education.
Timelines	Ongoing

Priority – Successfully engage and integrate under-represented groups in the local labour force Three groups identified locally as underrepresented - aboriginals, persons with disabilities and older women	
Goal	Collect the educational and employment data/information for the Tyendinaga Territory and identify activities and initiatives that explore and facilitate improved workforce transitions for the local Aboriginal workforce population.
Action	Conduct a house to house Labour Force and Training Survey for the Tyendinaga Territory. Analyze the data and provide a Summary Report with Recommendations
Partners	Tyendinaga Band Council, Mohawks of the Bay of Quinte, residents of the Territory
Timeline	Fall 2011 - ongoing
Goal	To better equip youth with disabilities with the skills, opportunities and linkages needed to assume meaningful careers, by providing hands-on exposure to the world of work, as well as information about the local job market and career options.
Action	Develop a Work/Career Experience summer camp model that will provide a variety of placement activities including: guest speakers, workplace tours, and hands on work experience.
Partners	ODSP, Sir James Whitney School for the Deaf, Algonquin Lakeshore Catholic District and Hastings Prince Edward District School Boards, local employers and others TBD
Timelines	TBD

Priority – Increase local educational attainment levels Encourage more young people to complete their OSSD and adults to embrace the concept of 'lifelong learning'	
Goal	Increase the numbers of local youth that are graduating from high school to avoid their exclusion from the work force.
Action	Develop activities and resources for youth that provide more defined links between education and specific careers, with a particular focus on 'essential skills' and Math and Science.
Potential Partners	Youth agencies, Community Employment Services, School Boards, employers and others. TBD
Timelines	Ongoing
Goal	Develop the resources and skills necessary for youth to become successful peer mentors. Peer mentors provide important extra support and advice, and serve as role models for the younger students. Assistance with school work, study skills, dealing with peer pressures and issues of attendance and behaviour, can aid in their successful completion of high school. These experiences can also help them make a more successful transition into the workplace
New Action	ECOTB with our community partners will research and develop a 'Mentoring' handbook as well as host a Mentoring Training Forum for senior secondary student mentors. The Forum may include motivational Guest Speakers, Panel Discussion, and a variety of training sessions including: Managing My Time, Conflict Resolution, Teamwork, Values, Communication, Goal Setting, and Understanding Boundaries to name a few. This project will provide training, accreditation (where possible), resources and skills necessary to assist young mentors, not only in mentoring their peers, but in developing valuable life skills and experience that will stand them in good stead whatever their post secondary destinations .
Potential Partners	Youth agencies, local school boards and others. TBD
Timelines	Fall 2011 and ongoing

Priority – Address local Labour Market Information/Data Gaps Improve/increase the collection and access to Data that is current, specific and local	
Goal	Develop a cooperative approach to data collection, analysis and information sharing.
New Action	Conduct a regional Local Food BR+E that will form part of a broader economic development effort that encompasses the retention and expansion of existing enterprises, as well as the attraction of new businesses to the region. This project will provide the data necessary to define the strengths and weaknesses of the sector. Armed with this knowledge the community can work together to prioritize, develop and implement appropriate actions.
Partners	Counties of Peterborough, Kawartha, Northumberland, Hastings, Prince Edward, Lennox & Addington and Frontenac, and the cities of Peterborough, Quinte West, Belleville and Napanee Economic Development Offices, OMAFRA and others. TBD
Timelines	Ongoing
New Action	Conduct a local Industry (Manufacturing) BR+E
Partners	City of Belleville Economic and Strategic Initiatives, Quinte Economic Development Commission, Quinte Manufacturers' Resource Centre and others. TBD
Timeline	2011
New Action	Community partners to collaborate on joint purchases of custom data sets from Statistics Canada etc.
Potential Partners	Local economic development offices, others. TBD
Timelines	May 2011 - ongoing
Goal	Identify existing informal local training programs, industry recognized local trainers and best practices related to workplace training.
New Action	Develop an accessible inventory of existing informal employer training programs to develop collaborative training opportunities for local SMEs.
Potential Partners	Local economic development offices, local employer associations and other. TBD
Timelines	TBD

Priority – Encourage and support sustainable growth the agricultural and food sectors	
Goal	Support and encourage sustainable growth in the Agriculture and Agri-Food Sectors.
Action	Research and develop an accessible online inventory of the region's local food producers, resources (incubator kitchens), and trainers/mentors.
Partners	OMAFRA, local Economic Development Offices, Ontario Federation of Agriculture, associations. TBD
Update	Online Agriculture Inventory on Harvest Hastings website, with over 30 fields of information with survey and reporting capabilities.
Timelines	Database and website design complete, data collection is ongoing.
Goal	Facilitate the transfer of knowledge from older farmers to the new 'urban' farmers.
Action	Research, recruit, catalogue and publish potential mentors and subject areas.
Update	Ongoing collection of data on Harvest Hastings website.
Partners	OMAFRA, local Economic Development Offices, Ontario Federation of Agriculture, SkillShare.
Timelines	Ongoing

Priority – Realize the social, environmental and economic opportunities associated with the emerging 'green' economy Look at the trends and prepare for the future in order to preserve and create good jobs	
Goal	Facilitate an effective transition from a traditional labour force to one that is enriched with 'green' knowledge in response to regulatory and consumer demands.
New Action	Identify the local demand for green skills and the accessibility of appropriate and certified training. Coordinate training that will enhance the skills of existing workers and broaden the potential markets for local contractors and firms.
Potential Partners	Regional Economic Development Offices, Quinte Home Builders Association, Quinte Construction Association, Prince Edward Home Builders, Loyalist College, St. Lawrence College and others. TBD
Timelines	Ongoing

Priority – Aging workforce Extend the 'careers' of the existing workforce and facilitate a knowledge transfer to the next generation of workers	
Goal	Facilitate older and displaced workers to re-integrate, or maintain them in the labour market, with a particular focus on those with Gr. 12 or less education.
Action	Support the development of programs and initiatives that recognise and support the learning culture of older workers.
Potential Partners	ALFICan (Adult Learner Friendly Institutions Canada), Local literacy agencies.
Timelines	Ongoing
Goal	Prolong the participation of older workers in the labour force and encourage the transfer of knowledge and skills to the next generation of workers or business owners.
Action	Develop and support Mentorship initiatives that pair young workers with older workers who are phasing into retirement.
Potential Partners	SkillShare Advisory Committee, Economic Development Offices, Chambers of Commerce. TBD
Timelines	Ongoing
Goal	Encourage employers to provide a wider variety of employment opportunities including: part time, flex time and phased retirement opportunities.
Action	Establish a task force to research and review promising practices of SMEs in other regions.
Potential Partners	TBD
Timelines	Ongoing

Priority - Retention of workers ***Work Ethic***, or the lack thereof, was an employment concern echoed by employers and employment placement agencies throughout the community consultation process.	
Goal	To develop an enhanced understanding in employers and trainers of the motivations, specific needs and environments to better engage and retain the current generation in the workplace.
Action	Develop a 'Toolkit'' to assist employers in developing an environment that successfully meshes younger workers with more mature groups.
Potential Partners	Community Employment Service providers, professional organizations, Chambers of Commerce.
Update	Ongoing
Action	Research and develop tools/best practices for SMEs to increase their capacities to support employees' work-life balance, especially during a time of increased economic pressure.
Potential Partners	Community Employment Service providers, professional organizations, Chambers of Commerce.
Action	Provide employers, job developers and teachers with a better understanding of the motivations, goals and trends affecting youth through a series of 'train the trainer' and awareness workshops.
Update	Deliver Smart Work Ethics 'Train the Trainer' series to influencers such as Job Developers, Employment Counsellors and Teachers – first sessions completed.
Partners	Community Employment Service providers, school boards, professional organizations, Chambers of Commerce.
Timeline	Initial Train the Trainer sessions completed, March 2011. Ongoing

Priority – Encourage youth to consider and explore employment in technical and skilled trades careers	
Goal	Encourage young people to consider entering careers in the Manufacturing and Construction Sectors.
Action	Research, write, produce and distribute a Manufacturing Career Guide (CD Rom) that profiles the career opportunities, skill and educational requirements, salary rates and career paths available in the manufacturing sector. Integrate this resource into the Grade 10 Career Studies program.
Update	Manufacturing Your Career Guide (DVD) – '*Think Inside the Box!'* – completed
Partners	Quinte Economic Development Commission, Quinte Manufacturers' Association, MTCU Apprenticeship Branch, SHSM Manufacturing (HPEDSB).
Action	Research, update, produce and distribute the Skilled Trades Handbook, profiling the skilled trades careers, educational and apprenticeship criteria. Provide class sets to local schools (senior elementary, Grade 10).
Update	New Skilled Trades Handbook – completed.
Partners	MTCU Apprenticeship Branch, Algonquin Lakeshore Catholic District and Hastings, Prince Edward District school Boards.

Priority – Address issues of the region's higher than average economic dependency ratio and lower employment income levels. ***Financial Literacy*** is an important cornerstone in lifelong learning and key to independent living. These skills and knowledge can allow individuals to make more informed and effective decisions through their understanding of finances.	
Goal	Increase the 'financial capability' of our community with an emphasis on youth and those on fixed or limited incomes. Impart this information to as many 'influencers' as possible, to ensure that an understanding of 'Financial Literacy' reaches as many in the community as possible, in particular: those on limited or fixed incomes, the unemployed, the working poor and youth.
Action	Facilitate the training of a Financial Literacy program to local 'influencers' such as Job Developers, Community Employment Services Providers, teachers and others. TBD
Timelines	Fall 2011 - ongoing

Appendix A - Indicator / Sector Update

Industrial Structure

Businesses are divided into industry sectors according to their activities. These sectors are based on the 2007 North American Industry Classification System (NAICS) The industrial composition of the region and more significantly, any shifts in that structure can have considerable impact on the local labour market. The top ten local industry sectors with the greatest number of employers were examined and ranked in the tables below.

Hastings County - Top 10 Employment Sectors - 2010

NAICS	0	1 - 4	5 - 9	10 - 19	20 - 49	50 - 99	SME Total	Rank
238 - Specialty Trade Contractors	259	217	84	38	13	1	612	1
531 - Real Estate	476	102	17	8	6	0	609	2
541 - Professional, Scientific and Technical Services	327	156	45	28	4	2	562	3
561 - Administrative and Support Services	134	88	41	16	17	3	299	4
484 - Truck Transportation	219	53	10	8	7	4	301	5
722 - Food Services and Drinking Places	62	61	52	66	42	14	297	6
236 - Construction of Buildings	151	89	27	16	7	2	292	7
811 - Repair and Maintenance	129	95	41	14	3	0	282	8
112 - Animal Production	180	53	10	1	1	0	245	9
523 - Securities, Commodity Contracts, and Other Financial Investment and Related Activities	181	34	7	2	2	0	226	10

Source: Canadian Business Patterns - 2010

Prince Edward County - Top 10 Employment Sectors - 2010								
NAICS	0	1 - 4	5 - 9	10 - 19	20 - 49	50 - 99	SME Total	Rank
722 - Food Services and Drinking Places	12	27	102	123	334	66	664	1
238 - Specialty Trade Contractors	68	99	143	53	30	0	393	2
541 - Professional, Scientific and Technical Services	111	116	59	27	59	0	372	3
721 - Accommodation Services	27	25	13	56	149	70	340	4
445 - Food and Beverage Stores	7	22	39	27	61	141	297	5
522 - Credit Intermediation and Related Activities	3	2	6	43	222	N/A	282	6
236 - Construction of Buildings	46	53	45	105	0	0	249	7
531 - Real Estate	94	31	13	52	30	0	220	8
112 – Animal Production	106	67	19	26	0	0	218	9
813 – Religious, Grant-Making, Civic, and Professional and Similar Organizations	12	57	45	0	30	69	213	10

Lennox & Addington County Top 10 Employment Sectors - 2010								
NAICS	0	1 - 4	5 - 9	10 - 19	20 - 49	50 - 99	SME Total	Rank
722 - Food Services and Drinking Places	11	34	82	109	273	132	641	1
238 - Specialty Trade Contractors	71	139	149	145	59	0	564	2
541 - Professional, Scientific and Technical Services	73	72	79	67	0	135	425	3
445 - Food and Beverage Stores	14	34	46	27	122	141	382	4
236 - Construction of Buildings	31	55	97	26	118	0	328	5
522 - Credit Intermediation and Related Activities	2	9	0	29	194	N/A	234	6
561 - Administrative and Support Services	27	61	45	66	30	0	230	7
447 - Gasoline Stations	8	13	54	64	84	N/A	222	8
112 - Animal Production	87	39	19	13	55	0	213	9
812 - Personal and Laundry Services	12	17	25	53	0	65	172	10

Source: Canadian Business Patterns - 2010

In each of the counties, 238 - Specialty Trades Contractors, 541 – Professional Scientific & Technical Services and 722 - Food Services and Drinking Places figured prominently. The relative importance of these sectors reflects a continued growth in construction and renovation activity; increased demand for analytical skills and judgement (the creative economy); and finally the region's strong focus as a tourism destination.

Number of Employers

The number of employers, the size of employers and the changes to the number and size of the employers over time affects employment levels and employment opportunities within the region. The rate of change in the total number of employers in all company size ranges was compared to that for the province as a whole. The table below show the total numbers and rates of change by county. Both Hastings and Lennox & Addington Counties experienced a decline in the number of employers over the December 2008 and June 2010 period. Hastings County experienced a significant decline; however the decline in Lennox & Addington is staggering in comparison to the province. At the same time Prince Edward County experienced a remarkable growth, far exceeding that of the province as a whole.

County	Number of Employers Dec 08	Number of Employers June 10	Absolute Change	% Change	% Ontario Change
Hastings	7,475	7,368	-107	-1.43	-.60
Prince Edward	1,460	1,768	308	21	-.60
Lennox & Addington	1,782	1,539	-243	-13.64	-.60

Source Canadian Business Patterns (December 2008 and June 2010)

Not all sectors experienced decline during this time period. The top five industry sectors showing the greatest absolute growth for the 2008-2010 period is displayed by county in the tables below.

Hastings County Top Five Industry Sectors Showing Greatest Growth in Employment 2008 - 2010					
NAICS	**2008**	**2009**	**2010**	**Absolute Change 2008 - 2009**	**Absolute Change 2008 - 2010**
446 - Health and Personal Care Stores	508	596	686	88	**178**
444 - Building Material and Garden Equipment and..	589	637	730	48	**141**
722 - Food Services and Drinking Places	3,541	3,780	3,665	239	**124**
333 - Machinery Manufacturing	91	159	176	67	**85**
111 - Crop Production	150	162	223	12	**73**

Source: 2010 Canadian Business Patterns

Prince Edward County Top Five Industry Sectors Showing Greatest Growth in Employment 2008 - 2010					
NAICS	**2008**	**2009**	**2010**	**Absolute Change 2008 - 2009**	**Absolute Change 2008 - 2010**
485 - Transit and Ground Passenger Transport.	46	46	127	0	**81**
238 - Specialty Trade Contractors	311	317	392	6	**81**
523 - Securities, Commodity Contracts, and Other Financial Investment and Related Activities	54	58	135	3	**80**
452 - General Merchandise Stores	25	51	103	26	**78**
321 - Wood Product Manufacturing	29	33	101	3	**72**

Source: 2010 Canadian Business Patterns

Lennox & Addington County Top Five Industry Sectors Showing Greatest Growth in Employment 2008 - 2010					
NAICS	**2008**	**2009**	**2010**	**Absolute Change 2008 - 2009**	**Absolute Change 2008 - 2010**
713 - Amusement, Gambling and Recreation Ind.	105	135	141	30	**36**
721 - Accommodation Services	65	53	81	-12	**15**
812 - Personal and Laundry Services	160	161	172	1	**12**
493 - Warehousing and Storage	19	20	28	1	**9**
418 - Miscellaneous Wholesaler-Distributors	23	37	33	14	**9**

Source: 2010 Canadian Business Patterns

Size of Businesses

Firms are divided into size categories according to the number of persons they employ. Businesses with fewer than 100 employees collectively represent a significant share of the total employment base for the region, and they can be a source of the next generation of large enterprises. However, due to their smaller size they often are more acutely affected by labour market adjustment challenges. When the employee size is noted as '0', this refers to those who are self employed with no employees and have a total income greater than $30,000. Small businesses with under $30,000 are not reported. As a result, the decline in this size range could be far greater than indicated here.

Hastings County
Change in Number of SME Employers by Size Range
June 2009 - June 2010

Employee Size Range	Number of Employers June 2009	Number of Employers June 2010	Absolute Change	% Change
0*	3,491	3,404	-87	-2.56
1 – 4	1,944	1,991	47	2.36
5 – 9	932	892	-40	-4.48
10 – 19	530	562	32	5.69
20 - 49	328	327	-1	-0.31
50 – 99	110	107	-3	-2.80
Total	7,398	7,283	-115	-1.58

*Self Employed with no employees income greater than $30,000

During the last year, June 2009 to 2010, Hastings County experienced a very significant decline in self employment numbers and in firms with 5 – 9 employees. However at the same time there was considerable growth in the number of 1 - 4 sized companies and 10 – 19. What the statistics can't tell us is whether these changes are a result of the smaller sized firms prospering and expanding into the next size category, or if the business in those size categories that declined actually failed or left the region.

Prince Edward County Change in Number of SME Employers by Size Range June 2009 - June 2010				
Employee Size Range	Number of Employers June 2009	Number of Employers June 2010	Absolute Change	% Change
0*	768	940	172	18.30
1 – 4	409	478	69	14.44
5 – 9	138	171	33	32.03
10 – 19	73	103	48	46.60
20 - 49	55	56	1	1.79
50 – 99	8	13	5	38.46
Total	1,451	1,761	310	17.60

*Self Employed with no employees income greater than $30,000

It appears that Prince Edward County is experiencing unparalleled growth in all the SME size categories. The last year statistics reveal remarkable growth in self employment numbers, with over 18 percent rate of change. All smaller firms, those with fewer than 20 employees enjoyed remarkable growth; however the 10 – 19 size range realized a staggering 46 percent positive change.

Lennox & Addington County Change in Number of SME Employers by Size Range June 2009 - June 2010				
Employee Size Range	Number of Employers June 2009	Number of Employers June 2010	Absolute Change	% Change
0*	873	741	-132	-17.81
1 – 4	475	448	-27	-6.02
5 – 9	195	172	-23	-13.37
10 – 19	103	91	-12	-13.19
20 - 49	62	59	-3	-5.08
50 – 99	20	17	-3	-17.65
Total	1,728	1,528	-200	-13.09

The statistics reveal quite a different story for Lennox & Addington, which experienced significant declines in all size categories. The largest changes were in the categories of self employment and mid-sized firms with 50 – 99 employees. In the latter category it is important to note that the absolute change was only a decline of 3 firms, but due to the limited number of firms in that category, it translates into a significant percentage.

Appendix B - Migration Characteristics

Communities offering employment opportunities tend to attract more people than they lose, conversely those communities with fewer employment opportunities are apt to lose more people than they attract. Each county in the region experienced a net out-migration of the 18-24 age group. This age range represents the *future* supply of workers; as a result, these losses cause some concern. This unease is somewhat tempered by the knowledge that many in this age cohort may have left to pursue a post secondary education, and could possibly return. The largest net in-migration for all counties was in the 45 – 64 age category. Both Hastings and Prince Edward County experienced a decline in the 65+ age category.

Hastings County Migration Characteristics – 2004 - 2009			
Age Group	In-migrants	Out-migrants	Net-migrants
0-17	7,034	6,465	569
18-24	4,434	5,542	-1,108
25-44	10,714	10,294	420
45-64	6,307	4,799	1,508
65+	2,537	2,549	-12
Total	31,026	29,649	1,377

Prince Edward County Migration Characteristics – 2004 - 2009			
Age Group	In-migrants	Out-migrants	Net-migrants
0-17	1,538	1,399	139
18-24	945	1,293	-348
25-44	2,186	2,051	135
45-64	2,192	1,168	1,024
65+	781	829	-48
Total	7,642	6,740	902

Lennox & Addington County Migration Characteristics – 2004 - 2009			
Age Group	In-migrants	Out-migrants	Net-migrants
0-17	2,876	2,564	312
18-24	1,526	2,038	-512
25-44	4,374	4,149	225
45-64	2,565	1,925	640
65+	1,051	974	77
Total	12,392	11,650	742

Source: Statistics Canada

Appendix C - Analysis of 2008 Canadian Taxfiler Data

ECOTB continues its annual analysis of local area income and economic dependency statistics using information derived from Statistics Canada Tax Filer Profile Data. This analysis provides insight into the economic wellbeing of the region's residents. There is, approximately a two year delay in the reporting of tax filer data. Analysis of the most recently released data, 2008, was used for this report. Additionally, analyses of the corresponding indicators for the province of Ontario as a whole serve as benchmarks for the interpretation of all regional indicators.

Average Annual Incomes – 2008

Geography	Average Annual Employment Income		Average Annual Wages, Salaries & Commissions		Average Annual Self-Employment Income	
	$	% of Ontario	$	% of Ontario	$	% of Ontario
Ontario	$42,322	100%	$43,062	100%	$19,109	100%
ECOTB Region	$32,385	76.5%	$33,681	78.2%	$11,379	59.5%

Geography	Average Annual Total Income		Average Annual Private Pension Benefits		Average Annual RRSP Income	
	$	% of Ontario	$	% of Ontario	$	% of Ontario
Ontario	$42,377	100%	$20,106	100%	$7,509	100%
ECOTB Region	$34,949	82.5%	$19,696	98.0%	$6,159	82.0%

Source: 2008 Canadian Taxfiler

In every income category, except Private Pensions, the region trails the province as a whole by a significant margin. The greatest gaps are in the average annual employment income categories: Employment Income (from all sources) (76.5% of Ontario), Wages, Salaries & Commissions (78.2%), and Self-Employment Income (59.5%).

The one exception is average annual Private Pension Benefits, where the region posted a value almost as large as that of the province (98% of Ontario). Regional average annual Total Income (82.5% of Ontario as a whole), and average annual RRSP Income (82%) were also significantly lower than their corresponding provincial income levels.

Economic Dependency Indicators 2008

Geography	Total Government Transfers		Employment Insurance Benefits		Social Assistance Benefits	
	# of Taxfilers	% of Taxfilers	# of Taxfilers	% of Taxfilers	# of Taxfilers	% of Taxfilers
Ontario	6,179,420	66.0%	739,660	7.9%	538,880	5.8%
ECOTB Region	107,320	70.7%	12,730	8.4%	11,300	7.4%

Geography	CPP Benefits		OAS Benefits	
	# of Taxfilers	% of Taxfilers	# of Taxfilers	% of CPP Recipients
Ontario	2,022,840	21.6%	1,645,280	81.3%
ECOTB Region	46,220	30.4%	34,880	75.5%

Source: 2008 Canadian Taxfiler

In every economic dependency category, the region had a higher percentage of taxfilers in receipt of government transfers, with the exception of Old Age Security benefits.

The most significant gaps between the region and the province as a whole occurred with respect to Total Government Transfers (i.e. total economic dependency), Social Assistance Benefits, and Canada Pension Plan Benefits. The CPP gap is primarily a reflection of the relatively older population in the region.

The other significant gap occurred with respect to OAS, where the province had a significantly higher percentage of CPP recipients who were also in receipt of OAS. This suggests that a higher percentage of provincial CPP recipients had total incomes low enough to qualify for OAS payments.

It is important to note that there is not always a direct correlation between the number of taxfilers in receipt of government transfers and overall economic dependency in any transfer category. It is possible to have relatively fewer recipients of transfers, but with a higher average transfer amount per recipient, so that overall economic dependency is actually higher for the geography with the relatively lower number of transfer recipients.
In addition, the relatively lower employment incomes earned in the Region result in relatively higher economic dependency ratios (EDRs).

Among the cities, Belleville had the highest average annual Self-Employment Income at $17,020 or 89.1% of the province, which was far above average for the region as a whole. At the other end of the scale, Napanee and Trenton posted average annual Self-Employment incomes of $11,728 and $11,710, respectively, or only 61.4% and 61.3% of the province, respectively.

In 2008, the region and all of its constituent geographies trailed the province as a whole in average annual Self-Employment Income by significant margins.

Appendix D – Reference Documents

- A Future Full of Potential – An Economic Development Action Plan for Hastings County – 2009 – 2012
- Literacy in Ontario – Ontario Learning Coalition – June 2009
- 2009 Development / Construction Business Retention and Expansion Report – Economic & Strategic Initiatives Department, City of Belleville - 2009
- People Without Jobs – Jobs Without People – Dr. Rick Miner – February 2010
- Outlook 2010 Navigating the Recovery – PLANT
- Enhancing the Productivity of Small and Medium Sized Enterprises Through Greater Adoption of Information and Communication Technology – Institute for Competitiveness & Prosperity - 2007
- Growing the Creative Rural Economy in Prince Edward County – PELA Institute for Rural Development – April 2008
- Ontario in the Creative Age – Martin Prosperity Institute – February 2009
- Hastings County Investment Attraction Strategy 2010-2012 – Miller, Dickinson, Blais Inc – August 2009
- A Tale of Ten Cities: Attracting and Retaining Talent – Michael Luis & Associates – November 2009
- Enhancing the Productivity of Small and Medium Enterprises through Greater Adoption of Information and Communication Technology – Roger L. Martin and James B. Milway – March 2007
- A Future Full of Potential – An Economic Development Action Plan for Hastings County 2009 – 2012 – Hastings County Economic Development Office – 2008
- Aboriginal Youth in Canada: Emerging Issues, Research Priorities, and Policy Implications – Genevieve Kroes – March 2008
- Workforce Ahead Summary – A Labour Study of Ontario's Food Processing Industry – Alliance of Ontario Food Processors
- Agri-Business Retention and Expansion- Understanding the Potential of BR&E as applied to the Agricultural Sector – Ohio State University - The Centre for Farmland Policy Innovation – 2007
- A Strategy for Ontario's Food and Beverage Processing industry – Alliance of Ontario Food Processors, Association of Ontario chicken Processors, Ontario Dairy Council, Ontario Independent Meat Processors, Wine Council of Ontario
- Diagnostic Assessment and Definition of the Food Industry in Canada – National Seafood Council - 2008
- Greening the Economy – Transitioning to New Careers – Peel, Halton Workforce Development Group, Toronto Workforce Innovation Group and York Region workforce Planning Board
- Belleville Community Profile 2011 – Economic and Strategic Initiatives Department – March 2011
- Community Shared Agriculture Survey - Organic Council of Canada – February 2009

Appendix E – Glossary of Terms

(Source: *Statistics Canada*, 2006 Neighbourhood Income & Demographics, Users Guide)

Economic Dependency
Refers to the degree of government assistance a region receives in the form of transfer payments. It is measured by the Economic Dependency Ratio, which relates annual government transfers into a region to the total annual employment income earned within the region.

Employment Income
Includes wages and salaries, commissions from employment, training allowances, tips and gratuities, self-employment income (net income from business, profession, farming, fishing and commissions), and Indian Employment Income (new in 1999).

Employment Insurance (EI)
Comprises all types of benefits paid to individuals under this program, regardless of reason, including regular benefits for unemployment, fishing, job creation, maternity, parental/adoption, retirement, self-employment, sickness, training and work sharing.

Government Transfer Payments
For the purpose of these 2006 data, transfer payments denote the following payments made to individuals by the federal or provincial governments: Employment Insurance, GST/HST credit, Canada Child Tax Benefit, Old Age Security pension/net federal supplements, Canada Pension plan, non-taxable income and provincial refundable tax credits, Family Employment Tax Credit, Ontario child care supplement for working families. The individuals in this case receive these payments without providing goods or services in return.

Taxfilers
Most taxfilers are people who filed a tax return for the reference year and were alive at the end of the year. Those taxfilers who died within the tax year and who had a non-filing spouse had their income and their filing status attributed to the surviving spouse.

Total Income

All income amounts are gross, with the exception of net rental income, net limited partnership income and all forms of net self-employment income.

Includes income reported by taxfilers from any of the following sources:

Labour income
Employment income
Wages/salaries/commissions
Other employment income as reported on line 104 of the tax form (tips, gratuities, royalties, etc.)
Net self-employment
Indian Employment Income
Employment Insurance (EI) benefits
Pension income
Old Age Security/net federal supplements (the latter including the Guaranteed Income Supplement and Spouses' Allowance)
Canada Pension Plan
Superannuation and other (private) pensions
Ontario Child Care Supplement for Working Families
Interest and other investment income
Dividend income
RRSP income (taxfilers 65+ only)
Net limited partnership income
Alimony
Net rental income
Income for non-filing spouses
Other incomes as reported on line 130 of the tax form (fellowships, bursaries, grants, etc.)
Goods and services tax (GST) credit
Harmonized sales tax (HST) credit
Canada Child Tax Benefit
Other non-taxable income
Workers' compensation payments
Social assistance payments
Guaranteed Income Supplement
Provincial refundable tax credits

Monies not included in income above are: veterans' disability and dependent pensioners' payments, war veterans' allowances, lottery winnings and capital gains.

Wages, Salaries and Commissions

Include employment pay and commissions as stated on T4 information slips, training allowances, tips, gratuities and royalties. The total of wages, salaries and commissions includes tax-exempt employment income earned on an Indian reserve. Wage and salary income of non-filing spouses can be identified, in some cases, from T4 earnings statements.

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