Labour Market

TRENDS, OPPORTUNITIES

and PRIORITIES (TOP)

REPORT

Sudbury & Manitoulin
September 2004

TRENDS, OPPORTUNITIES AND PRIORITIES (TOP) REPORT 2004

Introduction

Local labour market information has been collected from a variety of sources. One major source has been the data collected in the 2001 census. Statistics Canada has determined that the three major trends for the Sudbury Census Metropolitan Area are:

1) Youth out-migration
2) Aging Population
3) Lack of diversity in our cultural base.

Community consultations confirm those trends but have determined that the shortages in skilled trades persons is more of a determinant in our labour market picture. The community, at all eight of its consultations, has identified its top three priorities as:

1) Youth and Talent Out-migration combined with an Aging Population
2) Lack of In-migration (foreign and domestic) and
3) Skills Shortage in the Trades, Health, Computer and Technology Sectors.

As much as the mandate of the Sudbury & Manitoulin Training and Adjustment Board (SMTAB) is toward workforce development and not on economic development, the realities of Northern Ontario - with its huge Youth outmigration issues and aging population - makes the employment needs of potential economic growth areas to be of prime importance in **workforce planning** – both in the short and long term. Combined with our geographic distances as well as our declining and aging population, the economic growth of our communities and the skill sets needed in those sectors must be the number one priority for the Sudbury and Manitoulin districts. This was confirmed in every community consultation done by every group.

Without fail, consultations determined it to be imperative that the five economic engines identified as potential growth areas needed to be included as part of the TOP Report.

These are:
1) Service and Supply to the Mining Sector
2) Creative City Concept (Richard Florida)
3) Tourism Destination
4) Health Research & Biotechnology Leaders and
5) Eco-Industry & Renewable Energy Model

Community committees are being established in the different areas. It makes sense for the interested stakeholders to work together on a common front, integrate the variety of activities and – together – address the main issues of stemming out-migration and attracting or developing the skills we need for a prosperous future. By focussing our energies on the economic strategic plans established for the City of Greater Sudbury, workforce planning and development can be incorporated as a major component of the primary focus of job creation.

The Education sector has its own issues but is absolutely integral to the workings and skills development planning of every employment area. Community consultations identified our education partners as essential to the workforce development process.

The centrefold chart (Pages 15 & 16) summarizes the statistical information and analysis of both the issues identification exercise for our community as well as the economic engines defined as growth areas for job creation.

Profile derived from Statistics Canada Data

The analysis of eleven tables of StatCan data was provided to the community on CD format and is available of the SMTAB website. That information formed the basis for the community consultations.

Regional Analytics, a Hamilton consulting firm contracted by the Ministry of Training, Colleges and Universities (MTCU) and Human Resources Skills Development Canada (HRSDC), provided a 30 page Profile (not including appendices) of the Sudbury and Manitoulin training board area. An abbreviated version of the Labour Market Profile follows the local commentary.[1]

Executive Summary of the Labour Market Information

The population of the Sudbury & Manitoulin Training and Adjustment Board area (hereafter referred to as "Sudbury Manitoulin" or the local board area) is aging rapidly and this could give rise to labour force shortages in the future. The 2001 census tells us that…

- Sudbury Manitoulin's 2001 population is considerably less concentrated in the 0-4 year, 5-9 year and 10-14 year cohorts than is Ontario overall;
- the local board area is also significantly more concentrated in the 55-74 year age group, and slightly less concentrated in the 80 years and older cohort than is Ontario;
- over the period from 1991 to 2001, Sudbury Manitoulin experienced drastic declines in all age groups between the ages of 0 and 34, while Ontario experienced some growth in the age groups between 5 and 19 years of age;
  - most noticeable is the 27 percent decline in the number of persons aged 0-4 years in the local area between 1991 and 2001 (Ontario experienced a 5 percent decline), and the 53 percent decline in the number of persons aged 25-29 over the same period (Ontario experienced a 19 percent decline); and,
- while Ontario outpaced the local board area somewhat in terms of growth in the age groups above 65 years, the difference was not significant enough to compensate for the drastic declines noted above;
- most occupations in Sudbury Manitoulin experienced:
  - an increase in the share of all workers aged 45 years and older;
  - an increase in the share of all workers aged 65 years and older; and,
- 17 out of 26 occupational groups experienced an increase in the proportion of workers aged 55 years and older, for example:
  - Labourers in Primary Industry (200.0 percent increase);
  - Paraprofessional Occupations in Law, Social Services, Education and Religion (183.3 percent); and
  - Professional Occupations in Business and Finance (69.2 percent).
- The most notable decreases for workers aged 55 or older were in:
  - Intermediate Occupations in Primary Industry (78.8 percent decrease);
  - Processing and Manufacturing Machine Operators and Assemblers (31.3 percent decrease); and
  - Processing, Manufacturing And Utilities Supervisors and Skilled Operators (30.8 percent decrease).

[1] Anyone wishing the pdf format of the complete document and appendices can contact the SMTAB office at (705) 675-5822 or ***ltab@smtab.on.ca*** or can download from the website at ***www.trainingboard.com***.

The education level of the Sudbury Manitoulin workforce in 2001 is slightly lower than Ontario as a whole but higher than it was in 1996. Skilled trades occupations are on the decrease.

- the difference between Sudbury Manitoulin and Ontario in terms of educational attainment in the workforce has widened since 1991;
- since 1991, the share of the employed labour force reporting a "Trades Certificate or Diploma" as the highest level of education attained has decreased in Sudbury Manitoulin as well as in Ontario overall, but Sudbury Manitoulin is still higher;
- Francophones, and Aboriginals have consistently shown lower educational attainment levels than the general employed labour force since 1996, but both groups have experienced an increase in the level of educational attainment since 1996;
  - in the case of Aboriginals, this is evidenced only by a decreasing share of all workers reporting "Less than Grade 9" as the highest level of education;
  - in the case of Francophones, this group experienced both a reduction in the share reporting "Less than Grade 9" and an increased share reporting "University" between 1991 and 1996;
- Immigrants (foreign and domestic) who immigrated to Sudbury Manitoulin between 1996 and 2001 appear to have a lower educational attainment level than those who immigrated into the local board area between 1991 and 1996; for example:
  - in 1996 9.3 percent of Immigrants reported receiving a Secondary School diploma, compared to only 8.6 percent in 2001;
  - in 2001 37.6 percent of Immigrants reported "university" as their highest level of educational attainment, whereas in 1996, the share was 42.1 percent; and
  - in 1996 only 1.4 percent of Immigrants reported having Trades education, while in 2001 4.7% reported Trades as their highest educational attainment level.

In terms of the occupational mix in Sudbury Manitoulin:

- the top 3 occupations in 2001 were:
  - Elemental Sales and Service Occupations (e.g. cashiers, security guards, nannies etc.) (11.9 percent);
  - Intermediate Sales and Service Occupations (e.g., retail salespersons, bartenders, sales representatives, travel agents etc.) (10.1 percent); and
  - Trades and Skilled Transport Equipment Operators (e.g. contractors, carpenters, electricians, plumbers etc.) (9.7 percent); and,
- relative to Ontario as a whole, Sudbury Manitoulin is more heavily concentrated in:
  - Intermediate Occupations in Transport, Equipment Operation, Installation and Maintenance (e.g. truck drivers, taxi drivers, heavy equipment operators);
  - Trades and Skilled Transport and Equipment Operators (e.g. contractors, machinists, carpenters, electricians, plumbers, aircraft mechanics etc.);
  - Intermediate Sales and Service Occupations (e.g., retail salespersons, bartenders, sales representatives, travel agents etc.); and
  - Elemental Sales and Service Occupations (e.g. cashiers, security guards, nannies etc.).
  - Sudbury Manitoulin also experienced a more pronounced decline, than did Ontario, in the prevalence of professional occupations between 1991 and 2001;
- among those occupations in the local board area that experienced the most rapid growth between 1991 and 2001 were:
  - Labourers in Processing, Manufacturing and Utilities (e.g., labourers in metal fabrication, labourers in fish processing, labourers in wood, pulp and paper processing etc.);
    - 77.4 percent increase in Sudbury Manitoulin;
    - 5.7 percent increase in Ontario;
  - Skilled Occupations in Primary Industry (e.g. forestry supervisors, greenhouse managers, farmers and farm managers, fishing vessel skippers and fishermen etc.);
    - 76.8 percent increase in Sudbury Manitoulin;

        - 9.4 percent decrease in Ontario; and,
    - Intermediate Occupations in Primary Industry (e.g. logging and forestry workers, underground mine service and support workers, general farm workers etc.);
        - 75.4 percent increase in Sudbury Manitoulin;
        - 22.5 percent decrease in Ontario.

Retail trade industries are the top employers in the Sudbury Manitoulin area. However, the 2001 census is showing strong performance in public sector activity such as health care and administration.

- Retail trade (13.4 percent);
- Health care and social assistance (11.8 percent);
- Public administration (8.2 percent); and
- Educational services (7.9 percent).

In 2001, out-commuting to other jurisdictions for the purpose of employment was insignificant in Sudbury Manitoulin with nearly 98% of the resident work force also working in the area.

Section 1: The Local Community Picture

It must always be remembered that the map of Northern Ontario is not drawn to scale. Ninety per cent (90%) of Ontario's land mass is home to only 9.6% of Ontario's population. The huge revenues that the riches of our natural resources continue to provide to the province and country as a whole offset low population numbers and lower-than-provincial income levels. The announcement that 102 provincial government jobs are coming to Sudbury in the fall of 2004 is welcome news.

The Sudbury & Manitoulin Training and Adjustment Board (SMTAB) is mandated to co-ordinate local labour market information, community perspectives and plans for the District of Sudbury and the District of Manitoulin. The former, which includes the City of Greater Sudbury, is predominantly urban and the latter is definitely rural.

The City of Greater Sudbury is located approximately 450 kilometers north of Toronto. The total population of the new City of Greater Sudbury (the 2001 amalgamation of seven municipalities) stands at 155,219. An annual 5% net loss in population, combined with aging and youth out-migration, are major challenges that face us as a community.

As long as the birth rate per family holds at 2.1 children, it is expected that Greater Sudbury's aging population will surpass our Youth numbers by 2011. As an economic attraction tool, this statistic also affects availability and location of schools over the long term. With youth numbers dwindling, in concert with out-migration issues across the North, developing pools of skill sets to address the needs of economic growth areas will be a monumental task requiring full community participation.

Greater Sudbury is a rich multicultural community where 28.2% of the community ranks French as their mother tongue and 40% identify themselves as bilingual. This statistic surpasses even that of Ottawa making language proficiency a valuable human resource for employers needing that skill.

Geographic distances for training opportunities or education is always a challenge in the north. Distance education is widely used in specific training areas. Availability of computers, Internet availability and access to human mentors/advisors continues to be problematic. The latter two are clearly due to geographic difficulties that will not be resolved in the short term or by using conventional methods.

The community has comprehensively identified the five economic engines for potential growth. Only one is an established economic "cluster" – Supply and service to the mining sector. The other four: Richard Florida's Creative City Concept; becoming a major Tourism destination; leading the north in health research and biotechnology and being a world model in eco-industry and renewable energy are areas where Sudbury and area has shown it has growth potential. City and community planning is being built around those five areas.

As a community, we have to be innovative. Since the concurrence of all community groups is that an increase in meaningful jobs will result in addressing many of the identified labour market concerns, it is necessary to look closely at the areas where that kind of job creation is most likely.

As can be seen below, the competitive advantage analysis[2] for the City of Greater Sudbury shows those five areas as well as other areas where there is potential job growth – either as an existing strength or an emerging one. Local competitive advantage analysis data must be reviewed in conjunction with collected data including labour force attributes, infrastructure and service capacity and the size and performance of local industries, compared to other communities. Only then can this knowledge be transformed into strategies where what the community has - is weighed against what is needed to support new industries or to retain and expand existing businesses.

The Greater Sudbury Chamber of Commerce, the Greater Sudbury Development Corporation, and the Sudbury & Manitoulin Training and Adjustment Board are partnering to begin a comprehensive Business Retention and Expansion Program (BR+E). It is a major community project that will require the participation and enthusiasm of all community stakeholders.

Employers have consistently advised that the local labour pool lacks an adequate level of skills that they seek. Despite major efforts for upgrading by the local Social Assistance and Human Resources Skills Development programs, the local labour pool continues to show a need for skills training as well as what is currently done around skills training in preparation for specific sectors.

The high-end jobs are usually targeted for specific skills in national and international job markets such as technicians for the Neutrino lab. Availability of personnel for minimum wage jobs has not met any barriers either. Nor is there a shortage of skills for the "second salary" types of employment. [These are jobs where there is a main earner in a household and a second income is employed in this sector.] Jobs that earn more than minimum wage and hover around the $10 range are generally considered 'second salary' positions.

Local Jobs Picture

High-end jobs (e.g. – Neutrino lab techs/scientists)	} Usually targeted for specific needs
Trades, Health, Tech, Computer — **Jobs requiring skills training**	} Local Labour Pool inadequate to meet needs

[2] Acknowledgement to Clare Wasteneys, Community Economic Analysis Program Lead, Ontario Ministry of Municipal Affairs and Housing. Anyone wishing the unedited document can contact the SMTAB office at (705) 675-5822 or go online at www.trainingboard.com It is important to keep in mind that each type of analysis will provide only one perspective about a community's economy. Every analysis should be grounded in what is known about the community from other sources, including business directories, municipal records, results of community surveys and discussions with other community members about the local economy.

"Second salary" kinds of jobs
(e.g. – call centres)

Minimum wage jobs

Available in local market

As discussed with HRSDC January 2004 / Confirmed August 2004

competitive advantage analysis Employed Resident Labour Force	*Location Quotient, Provincial Sector and Local Relative Growth*				*Sector Performance*
Sectors (Standard Industrial Classification)	**Location Quotient 2001 Greater Sudbury**	**Provincial Sector Relative Growth**	**Local Sectoral Relative Growth**		**Industry Targeting Classification**
Division D - Mining (including milling), quarrying and oil well industries	**20.94 Very High**	**Lagging(-)**	**Lagging**	**(-)**	**Prospects limited by external trends & declining competitiveness**
Major Group 06 - Mining industries	31.06 Very High	Lagging(-)	Lagging	(-)	Prospects limited by external trends & declining competitiveness
061 Metal mines	33.75 Very High	Lagging(-)	Lagging	(-)	Prospects limited by external trends & declining competitiveness
062 Non-metal mines (except coal)	0.78 Med.	Lagging(-)	Lagging	(-)	Prospects limited by external trends & declining competitiveness
Major Group 09 - Service industries incidental to mineral extraction	12.56 Very High	Lagging(-)	Leading	(+)	Prospects limited by external trends
092 Service industries incidental to mining	15.69 Very High	Lagging(-)	Leading	(+)	Prospects limited by external trends
152 Rubber hose and belting industry	0.66 Low	Lagging(+)	Leading	(+)	Emerging Strength
Major Group 16 - Plastic products industries	0.12 Low	Leading(+)	Leading	(+)	Emerging Strength
Major Group 25 - Wood industries	0.49 Low	Leading(+)	Leading	(+)	Emerging Strength
254 Sash, door and other millwork industries	0.5 Low	Leading(+)	Leading	(+)	Emerging Strength
272 Asphalt roofing industry	0 -	Lagging(-)	Lagging	(-)	Prospects limited overall
273 Paper box and bag industries	0.24 Low	Lagging(+)	Leading	(+)	Emerging Strength
281 Commercial printing industries	0.29 Low	Lagging(+)	Leading	(+)	Emerging Strength
Major Group 33 - Electrical and electronic products industries	0.1 Low	Leading(+)	Leading	(+)	Emerging Strength
Major Group 37 - Chemical and chemical products industries	0.17 Low	Lagging(-)	Lagging	(-)	Prospects limited overall
374 Pharmaceutical and medicine industry	0.09 Low	Lagging(+)	Lagging	(-)	Prospects limited due to weak base and declining local competitiveness
Major Group 39 - Other manufacturing industries	0.21 Low	Leading(+)	Leading	(+)	Emerging Strength
391 Scientific and professional equipment industries	0.17 Low	Lagging(+)	Leading	(+)	Emerging Strength
397 Sign and display industry	0.56 Low	Leading(+)	Leading	(+)	Emerging Strength
399 Other manufactured products industries	0.18 Low	Leading(+)	Leading	(+)	Emerging Strength
Division F - Construction industries	**0.97 Med.**	**Leading(+)**	**Lagging**	**(-)**	**High priority retention target**
Major Group 40 - Building, developing and general contracting industries	1.02 Med.	Lagging(+)	Lagging	(-)	High priority retention target
401 Residential building and development	0.97 Med.	Lagging(+)	Lagging	(-)	High priority retention target

competitive advantage analysis **Employed Resident Labour Force**	***Location Quotient , Provincial Sector and Local Relative Growth***				***Sector Performance***
Sectors (Standard Industrial Classification)	**Location Quotient 2001 Greater Sudbury**	**Provincial Sector Relative Growth**	**Local Sectoral Relative Growth**		**Industry Targeting Classification**
402 Non-residential building and development	1.28 High	Lagging(+)	Leading	(+)	Current Strength
Major Group 41 - Industrial and heavy (engineering) construction industries	2.29 High	Leading(+)	Lagging	(-)	High priority retention target
411 Industrial construction (other than buildings)	2.77 High	Lagging(+)	Lagging	(-)	High priority retention target
412 Highway and heavy construction	2.23 High	Leading(+)	Lagging	(+)	High priority retention target
Major Group 42 - Trade contracting industries	0.83 Med.	Leading(+)	Lagging	(+)	High priority retention target
421 Site work	0.67 Low	Leading(+)	Lagging	(-)	Prospects limited due to weak base and declining local competitiveness
422 Structural and related work	0.92 Med.	Leading(+)	Leading	(+)	Current Strength
423 Exterior close-in work	0.82 Med.	Leading(+)	Lagging	(-)	High priority retention target
424 Plumbing, heating and air conditioning, mechanical work	0.95 Med.	Leading(+)	Lagging	(-)	High priority retention target
425 Mechanical specialty work	1.14 Med.	Lagging(+)	Lagging	(-)	High priority retention target
426 Electrical work	0.81 Med.	Leading(+)	Lagging	(0)	High priority retention target
427 Interior and finishing work	0.77 Med.	Leading(+)	Leading	(+)	Current Strength
429 Other trade work	1 Med.	Leading(+)	Leading	(+)	Current Strength
Major Group 49 - Other utility industries	0.82 Med.	Lagging(+)	Lagging	(-)	High priority retention target
491 Electric power systems industry	0.74 Low	Lagging(+)	Lagging	(-)	Prospects limited due to weak base and declining local competitiveness
492 Gas distribution systems industry	1.07 Med.	Lagging(-)	Lagging	(-)	Prospects limited by external trends & declining competitiveness
493 Water systems industry	1.28 High	Leading(+)	Leading	(+)	Current Strength
499 Other utility industries, n.e.c.	0.74 Low	Lagging(-)	Lagging	(-)	Prospects limited overall
522 Beverages, wholesale	0.54 Low	Leading(+)	Leading	(+)	Emerging Strength
Major Group 53 - Apparel and dry goods industries, wholesale	0.51 Low	Lagging(+)	Leading	(+)	Emerging Strength
531 Apparel, wholesale	0.51 Low	Lagging(+)	Leading	(+)	Emerging Strength
592 Paper and paper products, wholesale	0.88 Med.	Leading(+)	Leading	(+)	Current Strength
598 General merchandise, wholesale	1.32 High	Leading(+)	Leading	(+)	Current Strength
Division J - Retail trade industries	**1.31 High**	**Lagging(+)**	**Leading**	**(+)**	**Current Strength**
Major Group 60 - Food, beverage and drug industries, retail	1.24 Med.	Lagging(+)	Lagging	(-)	High priority retention target

competitive advantage analysis **Employed Resident Labour Force**	***Location Quotient , Provincial Sector and Local Relative Growth***				***Sector Performance***
Sectors (Standard Industrial Classification)	**Location Quotient 2001 Greater Sudbury**	**Provincial Sector Relative Growth**	**Local Sectoral Relative Growth**		**Industry Targeting Classification**
601 Food stores	1.24 Med.	Lagging(+)	Lagging	(-)	High priority retention target
602 Liquor, wine and beer stores	1.57 High	Leading(+)	Lagging	(-)	High priority retention target
603 Prescription drugs and patent medicine stores	1.16 Med.	Lagging(+)	Leading	(+)	Current Strength
Major Group 61 - Shoe, apparel, fabric and yarn industries, retail	1.04 Med.	Lagging(+)	Leading	(+)	Current Strength
611 Shoe stores	1.67 High	Lagging(+)	Lagging	(-)	High priority retention target
612 Men's clothing stores	0.85 Med.	Lagging(-)	Lagging	(-)	Prospects limited by external trends & declining competitiveness
613 Women's clothing stores	0.98 Med.	Lagging(-)	Leading	(+)	Prospects limited by external trends
614 Clothing stores, n.e.c.	0.97 Med.	Leading(+)	Lagging	(+)	High priority retention target
615 Fabric and yarn stores	0.87 Med.	Lagging(+)	Lagging	(-)	High priority retention target
Major Group 62 - Household furniture, appliances and furnishings industries, retail	1.22 Med.	Leading(+)	Leading	(+)	Current Strength
621 Household furniture stores	1.32 High	Leading(+)	Lagging	(-)	High priority retention target
622 Appliance, television, radio and stereo stores	1.39 High	Lagging(+)	Lagging	(-)	High priority retention target
623 Household furnishings stores	0.85 Med.	Leading(+)	Lagging	(-)	High priority retention target
Major Group 63 - Automotive vehicles, parts and accessories industries, sales and service	1.31 High	Lagging(+)	Leading	(+)	Current Strength
631 Automobile dealers	1.34 High	Lagging(+)	Lagging	(-)	High priority retention target
632 Recreational vehicle dealers	2.07 High	Leading(+)	Lagging	(-)	High priority retention target
633 Gasoline service stations	1.65 High	Lagging(-)	Leading	(+)	Prospects limited by external trends
634 Automotive parts and accessories stores	1.39 High	Leading(+)	Lagging	(-)	High priority retention target
635 Motor vehicle repair shops	1.1 Med.	Lagging(+)	Leading	(+)	Current Strength
639 Other motor vehicle services	0.74 Low	Leading(+)	Lagging	(-)	Prospects limited due to weak base and declining local competitiveness
Major Group 64 - General retail merchandising industries	1.26 High	Lagging(+)	Leading	(+)	Current Strength
641 General merchandise stores	1.26 High	Lagging(+)	Lagging	(-)	High priority retention target
Major Group 65 - Other retail store industries	0.93 Med.	Lagging(+)	Lagging	(-)	High priority retention target
651 Book and stationery stores	0.93 Med.	Lagging(+)	Lagging	(-)	High priority retention target

competitive advantage analysis Employed Resident Labour Force	*Location Quotient , Provincial Sector and Local Relative Growth*				*Sector Performance*
Sectors (Standard Industrial Classification)	**Location Quotient 2001 Greater Sudbury**	**Provincial Sector Relative Growth**	**Local Sectoral Relative Growth**		**Industry Targeting Classification**
652 Florists, lawn and garden centres	0.71 Low	Lagging(+)	Lagging	(0)	Prospects limited due to weak base and declining local competitiveness
653 Hardware, paint, glass and wallpaper stores	1.52 High	Lagging(-)	Leading	(+)	Prospects limited by external trends
654 Sporting goods and bicycle shops	1.15 Med.	Leading(+)	Lagging	(-)	High priority retention target
655 Musical instrument and record stores	0.5 Low	Lagging(+)	Lagging	(-)	Prospects limited due to weak base and declining local competitiveness
656 Jewellery stores and watch and jewellery repair shops	1 Med.	Leading(+)	Lagging	(-)	High priority retention target
657 Camera and photographic supply stores	0.46 Low	Leading(+)	Lagging	(-)	Prospects limited due to weak base and declining local competitiveness
658 Toy, hobby, novelty and souvenir stores	0.68 Low	Lagging(+)	Leading	(+)	Emerging Strength
659 Other retail stores	0.93 Med.	Leading(+)	Leading	(+)	Current Strength
Major Group 69 - Non-store retail industries	3.95 High	Leading(+)	Leading	(+)	Current Strength
691 Vending machine operators	1.87 High	Lagging(-)	Lagging	(-)	Prospects limited by external trends & declining competitiveness
692 Direct sellers	4.07 High	Leading(+)	Leading	(+)	Current Strength
Division K - Finance and insurance industries	**0.49 Low**	**Leading(+)**	**Leading**	**(+)**	**Emerging Strength**
741-749 Other financial intermediary industries	0.5 Low	Leading(+)	Leading	(+)	Emerging Strength
Division M - Business service industries	**0.62 Low**	**Leading(+)**	**Leading**	**(+)**	**Emerging Strength**
Major Group 77 - Business service industries	0.62 Low	Leading(+)	Leading	(+)	Emerging Strength
775 Architectural, engineering and other scientific and technical services	0.77 Med.	Leading(+)	Leading	(+)	Current Strength
853 University education	1.25 High	Lagging(+)	Lagging	(-)	High priority retention target
Division P - Health and social service industries	**1.31 High**	**Lagging(+)**	**Leading**	**(+)**	**Current Strength**
Major Group 86 - Health and social service industries	1.31 High	Lagging(+)	Lagging	(+)	High priority retention target
861 Hospitals	1.44 High	Lagging(-)	Lagging	(-)	Prospects limited by external trends & declining competitiveness
862 Other institutional health and social services	1.16 Med.	Lagging(+)	Lagging	(-)	High priority retention target
863 Non-institutional health services	1.71 High	Leading(+)	Lagging	(-)	High priority retention target
864 Non-institutional social services	1.13 Med.	Leading(+)	Leading	(+)	Current Strength

competitive advantage analysis Employed Resident Labour Force	Location Quotient , Provincial Sector and Local Relative Growth				Sector Performance
Sectors (Standard Industrial Classification)	**Location Quotient 2001 Greater Sudbury**	**Provincial Sector Relative Growth**	**Local Sectoral Relative Growth**		**Industry Targeting Classification**
865 Offices of physicians, surgeons and dentists, private practice	1.06 Med.	Lagging(+)	Lagging	(-)	High priority retention target
866 Offices of other health practitioners	1.74 High	Leading(+)	Lagging	(-)	High priority retention target
867 Offices of social services practitioners	0 -	Leading(+)	Lagging	(-)	Prospects limited due to weak base and declining local competitiveness
868 Medical and other health laboratories	1.71 High	Lagging(+)	Leading	(+)	Current Strength
869 Health and social service associations and agencies	1.66 High	Lagging(-)	Leading	(+)	Prospects limited by external trends
Division Q - Accommodation, food and beverage service industries	**1.11 Med.**	**Lagging(+)**	**Leading**	**(+)**	**Current Strength**
Major Group 91 - Accommodation service industries	0.85 Med.	Lagging(-)	Lagging	(-)	Prospects limited by external trends & declining competitiveness
911 Hotels, motels and tourist courts	0.82 Med.	Lagging(-)	Lagging	(-)	Prospects limited by external trends & declining competitiveness
912 Lodging houses and residential clubs	2.45 High	Lagging(-)	Lagging	(-)	Prospects limited by external trends & declining competitiveness
913 Camping grounds and travel trailer parks	0.4 Low	Leading(+)	Lagging	(-)	Prospects limited due to weak base and declining local competitiveness
Major Group 92 - Food and beverage service industries	1.15 Med.	Leading(+)	Leading	(+)	Current Strength
921 Food services	1.16 Med.	Leading(+)	Lagging	(+)	High priority retention target
922 Taverns, bars and night clubs	1.01 Med.	Leading(+)	Lagging	(-)	High priority retention target
Division R - Other service industries	**0.94 Med.**	**Lagging(+)**	**Leading**	**(+)**	**Current Strength**
Major Group 96 - Amusement and recreational service industries	0.8 Med.	Leading(+)	Lagging	(-)	High priority retention target
961 Motion picture, audio and video production and distribution	0 -	Leading(+)	Lagging	(-)	Prospects limited due to weak base and declining local competitiveness
962 Motion picture exhibition	1.23 Med.	Leading(+)	Leading	(+)	Current Strength
963 Theatrical and other staged entertainment services	0.35 Low	Leading(+)	Leading	(+)	Emerging Strength
964 Commercial spectator sports	1.46 High	Leading(+)	Leading	(+)	Current Strength
965 Sports and recreation clubs and services	1.08 Med.	Lagging(-)	Leading	(+)	Prospects limited by external trends
966 Gambling operations	1.23 Med.	Leading(+)	Lagging	(+)	High priority retention target
969 Other amusement and recreational services	0.76 Med.	Lagging(+)	Lagging	(-)	High priority retention target

Section 2: Documents and References

Data used for discussion purposes was derived and incorporated from the following sources:

Organizations/Committees
* Statistics Canada (2001 Census data)
* HRSDC Sudbury (local jobs)
* City of Greater Sudbury
* Greater Sudbury Chamber of Commerce
* Manitoulin Economic Advisory Committee
* Health Research and Human Resources
* Lacloche and Manitoulin Business Assistance Corporation
* Social Planning Council – Sudbury and District
* Independent Living Resource Centre
* Espanola Chamber of Commerce
* Espanola Economic Development Department
* Community Economic Development Network
* Waubetek Economic Development Corporation

Presentations
* Sudbury Profile - Doug Hewson (StatCan) presentation
* State of the City Address – Mayor Dave Courtemanche
* Northern Ontario Aboriginal Conference
* N'Swakomok Native Friendship Centre
* Laurentian University Social Work Doctorate Program

Documents/Materials
* Greater Sudbury – Building for the City of Tomorrow
* GSDC Strategic Plan for Sudbury
* SMTAB community consultations
* Senior Friendly Sudbury Study
* INORD (Socio-economic studies) – Laurentian University Economics Department
* Youth Community Forum – Youth.Comm
* Earthcare Sudbury Local Action Plan
* Newspaper articles (Sudbury Star, Northern Life, Le Voyageur, Manitoulin Expositor)
* Community agency reports
* Reference groups
* Advisory Committees

Section 3: Consultation Process

The Local Labour Market Picture

Analysis of eleven Statistics Canada tables by Dr. Chris Southcott of Lakehead University was provided to community groups in CD format (available on www.trainingboard.com) in July through September 2003:

- Population Changes in Northern Ontario
- Youth Out-migration
- Aging Population in the North
- Mobility and Migration
- Changes in Labour Force Participation in the North

- Workforce Changes by Industry
- Workforce Changes by Occupation
- Women: by Industry, Occupation and Unpaid Work
- Education in Northern Ontario
- Changes in Incomes in Northern Ontario
- Aboriginal Communities in Northern Ontario

Almost 250 compact discs were disseminated throughout the community. The information from the above-noted documents and sources was used in all the community sessions as resource material.

Synopsis of eleven Tables from 2001 Census selected for Analysis

* Substantial and increasing youth out-migration.
* Substantial and increasing seniors population.
* Lower levels of education, training, literacy, income, and wage rates.
* Fewer manufacturing, industrial, & professional positions.
* A slowing of growth overall.
* Very low levels of in-migration and cultural diversity.
* Aboriginal Youth numbers are growing while elders are diminishing.

As noted in the Introduction, the three top trends identified by Statistics Canada for the Census Metropolitan Area of Sudbury are:

1) Youth out-migration
2) Aging Population
3) Lack of diversity in our cultural base.

The local information gathering process extended over both 2003 and 2004. There were a total of eight community consultations held from June 2003 through to November 2003. A cross-section of the community was invited to participate in each session, resulting in attendance of 150 to 200 at each session.

The City of Greater Sudbury held two sessions; one in June and the second in October as part of the process to develop a community strategic plan. The Greater Sudbury Development Corporation (GSDC) held three, looking at the different aspects of economic development and job creation. The Sudbury and District Social Planning Council held one session looking at employment and poverty and getting people off government support. The Older Adults developed a Seniors Study and the Youth Services community brought together the stakeholders involved in labour market and Youth. Representatives from SMTAB participated in each consultation.

Community committees are now established in a variety of sectors and continuously provide relevant information from their areas. The Sudbury and Area Mining Supply and Service Association, Earthcare Sudbury, Tourism and Leisure, Health, Apprenticeship, Technology and Bioresearch all offer information and expertise to the process. Each group acts in an advisory or reference capacity for its' particular bailiwick.

The community discussions confirmed the StatCan analysis but the community identified a third, more urgent trend for our community in terms of the labour market. Consultations agreed that lack of cultural diversity was a concern but it was a component of what is identified as our community's third labour market issue, as seen below:

1) Youth and Talent Out-migration combined with an Aging Population
2) Low In-migration, both domestic and foreign
3) Skills Shortage in Trades, Health, and Technology/Computers Sectors.

Community individuals and agencies were asked to review the draft TOP Report. Each was asked to submit **actions, activities and events** planned for the short and the long term **AS THE EVENT OR ACTIVITY RELATES TO SKILLS OR WORKFORCE DEVELOPMENT**. They were asked to look at their organization's strategic plans or identify activities of which they were aware. The following is a list of those asked to provide input:

Community Contacts

It should be noted that in the organizations listed below, generally more than one individual is involved with the consultation.

- Greater Sudbury Chamber of Commerce
- Sudbury and District Labour Council and its affiliates
- Greater Sudbury Development Corporation
- E-sudbury.com
- Regional Business Centre
- Sudbury & District Social Planning Council
- Sudbury Vocational Resource Centre
- Sudbury Action Centre for Youth
- Youth Employment Services
- Sudbury & District Building Trades Council
- Sudbury Construction Association
- Waubetek Economic Development Corporation
- Lacloche Manitoulin Business Advisory Corporation (LAMBAC)
- Espanola Economic Development office
- Espanola Chamber of Commerce
- Manitoulin Chamber of Commerce
- Shkagamik-Kwe Health Centre
- Community Care Access Centre
- Continuing Education Offices at Cambrian, Boréal and Laurentian
- Social Services at City of Greater Sudbury
- Mayor and Councillors for the City of Greater Sudbury
- Socio-economic department at Laurentian University– INORD
- Sudbury Regional Hospital Human Resources
- Northeastern Ontario Medical Education Corporation (NOMEC)
- Education Leaders for all seven local institutions
- Mid-North Network of Adult Learning
- Mid-North Literacy Network
- New Leaf Literacy
- St. Albert's Adult Learning Centre
- Northern Centre for Advanced Technology
- Earthcare Sudbury
- Rainbow Country Travel Association
- Ministry of Training, Colleges and Universities
- Ministry of Northern Development and Mines
- FedNor
- Human Resources Skills Development Canada
- Community activists in specified sectors

EXAMPLE

TOP Planning Chart

ISSUE

<table>
<tr><td colspan="5">High Out-Migration / Aging Population
Youth out-migration is the most noticeable with drastic declines from ages 0 to 34 over the period 1991 to 2001.
Significant growth in the 50+ age group. How do we retain our population.</td></tr>
<tr><td colspan="2">FACTS:
- Population in continuous decline - annual 5% net loss
- Aging population to surpass youth in 2011
- Youth leave for post-secondary elsewhere
- Self-employment not seen as a career
- Lack of human resource replacement planning</td><td colspan="3">COMMUNITY IMPACT:
- Skill levels in local labour pool are poor
- Severe effect on economic growth
- Job creation limited by skills available
- Have not been able to create or sustain the 'Bohemian' factor</td></tr>
<tr><td rowspan="2">PRIORITY</td><td>HIGH</td><td colspan="2">MEDIUM</td><td>LOW</td></tr>
<tr><td colspan="2">LONG TERM</td><td colspan="2">SHORT TERM</td></tr>
<tr><td>NEXT STEP (S)/
PROPOSED ACTION</td><td colspan="4">– Apply for funding to FedNor to begin a formalized Business Visitation program - BUSINESS RETENTION AND EXPANSION (BR+E)
– Apply to HRSDC for a JCP to act as Administrative Assistant
– Develop survey questionnaire attuned to Sudbury needs
– Begin list of community leaders to participate in the project as resource and visitation volunteers
– Hire a co-ordinator
– Project marketing to begin
– Begin training of community volunteers</td></tr>
<tr><td>PARTNERS
(Lead first)</td><td colspan="4">Greater Sudbury Chamber of Commerce
Greater Sudbury Development Corporation
Sudbury & Manitoulin Training and Adjustment Board
} Joint Venture</td></tr>
<tr><td>TIMELINES</td><td colspan="4">- Summer of 2004 begin groundwork with a joint venture agreement
- Phase 1 – October 04 to December 05
- September 04 – Funding to be approved
- October 04 – hire co-ordinator
- January 05 – volunteer training to begin</td></tr>
<tr><td>EXPECTED RESULTS/
OUTCOMES</td><td colspan="4">- Areas of business growth and consequent job creation identified
- Skills needed clearly identified
- Gaps identified
- A current database of employers and the skills they need</td></tr>
<tr><td>CURRENT STATUS</td><td colspan="4">- Budget finalized
- Funding application submitted
- Survey questions prepared
- List of community leaders begun</td></tr>
</table>

DATE	September 30, 2004

JOB CREATION continues to be the basic issue in all sectors. Creating more jobs in the identified areas of potential growth

ECONOMIC ENGINES
- Identified by community stakeholders

The Greater Sudbury Development Corporation (GSDC), through community consultations, has identified five "engines" - economic areas of potential growth and consequent job creation.

SERVICE AND SUPPLY TO THE MINING SECTOR

- the only economic "CLUSTER" at this date
- the springboard for gaining world-class recognition
- technologically complex processes
- exporting our expertise in mining
- a need for collaboration of small, medium AND large businesses to provide innovative and essential products and services around the world
- as a unit, plan human resources for the long term

A CITY FOR THE CREATIVE, CURIOUS & ADVENTURESOME

- become a 'people' place
- welcomes and encourages talented individuals of diverse cultural backgrounds and lifestyles
- appeal to the 'under 35' , be youth-friendly
- cater to a range of interests
- provide entrepreneurial supports and infrastructure

ONE OF THE TOP 4 TOURISM DESTINATIONS

- leverage Sudbury's superior natural assets, existing high quality attractions and tourist infrastructure, and its unique geological history
- position ourselves as an outstanding vacation destination
- identify ourselves as a quality place to live and work
- market our safety and security
- advertize how we are leaders in environmental stewardship
- appeal to visitors and the 'knowledge' workers

HEALTH RESEARCH & BIOTECHNOLOGY LEADERS

- build on Sudbury's history of advances in cancer care, clinical research, biotechnology products, rural medicine and healthy community systems
- Northern Ontario Medical School (NOMS) to be opened in 2005 will be unique in its curriculum development and in dealing with rural and northern communities
- collaboration and innovation by researchers and practitioners to better leverage Sudbury as a growing area of expertise

ECO-INDUSTRY & RENEWABLE ENERGY MODEL

- accelerate Sudbury's world role as an environmental steward through implementation of the local action plan developed by Earthcare Sudbury
- eco-industrialism and eco-sensitive behaviours to be the norm
- long-term environmental planning will be the payoff for community health
- environmentally responsible actions can aid in the development of business both financially and in community health benefits
- investigate potential innovation and entrepreneurial opportunities

1 High Out-Migration / Aging Population

Youth out-migration is the most noticeable with drastic declines from ages 0 to 34 over the period 1991 to 2001. Significant growth in the 50+ age group.

FACTS:
- Population in continuous decline - annual 5% net loss
- Aging population to surpass youth in 2011
- Youth leave for post-secondary elsewhere
- Self-employment not seen as a career
- Lack of human resource succession plans
- Family businesses need to start succession planning earlier

- Only the young aboriginal population on Manitoulin Island is growing
- Aging population - 60+ are diminishing

COMMUNITY IMPACT:
- Skill levels in local labour pool are poor
- Severe effect on economic growth
- Job creation limited by skills available
- Lack of investment opportunities of decision-makers who have a local interest in keeping business local
- Have not been able to create or sustain the 'bohemian' factor

- Elders not there to act as role models
- Idle youth without job prospects

2: Low In-migration

Includes all groups or individuals who move to reside in this area, foreign and domestic. 'Immigrants' refers to out-of-country.

FACTS:
- 83 immigrants located here in 2003
- Targeted skills sets sought - generally job specific
- Not a destination of choice for immigrants
- Sudbury not on the radar screen at entry-point immigrant centres
- Low return rate of Youth who leave
- Unemployment numbers discourage in-migration

COMMUNITY IMPACT:
- Skills in labour pool inadequate
- Vibrant ethnic and cultural communities are not developing

3: Skills Shortages

Education levels and training availability significantly impact the skills available within the local labour pool. The lack of skills succession planning by employers must be addressed.

FACTS:
- Higher illiteracy rates
- Customer service skills identified as poor
- Lack of succession planning around training and attrition
- Lack of info for the technology sector
- Larger employers recruit skilled personnel from smaller operations (SME's)
- Cost and time for smaller employers reduces the amount of training done
- Seasonal and economic influences are a major factor
- Short term, job-specific training not available for numerous small employers

COMMUNITY IMPACT:
- Four areas where shortages are identified will impact economic growth

Skilled Trades
Computer Sector
Health Careers
Technology

- Lower sets of skills available to the labour market
- Local training opportunities minimized
- Significant impact on smaller employers
- Fewer local apprenticeship opportunities
- Reduces local training and apprenticing

Chart prepared by

Sudbury & Manitoulin
Training and Adjustment Board

(705) 675-5822 / www.trainingboard.com

EDUCATION SECTOR

THE FOUNDATION OF ALL COMMUNITY ACTIVITIES

Cambrian College
Collège Boréal
Conseil scolaire catholique du Nouvel-Ontario
Conseil scolaire du district du grand nord de l'Ontario
Laurentian University
Rainbow District School Board
Sudbury Catholic District School Board

will begin to address the labour market concerns identified in the community consultations.

PLAYERS	ACTIONS	TIMEFRAME
Co-Leaders: GSCC SMTAB GSDC Other Community Partners: Educational Institutions Government Partners: FedNor MNDM HRSD Community Volunteers: From all sectors: Business Labour Retirees Students Educators Equity Groups	BUSINESS RETENTION AND EXPANSION **BR+E** A FORMALIZED BUSINESS VISITATION PROGRAM since 80% of all new jobs are created by existing businesses.	- March 9, 2004 - all-day workshop with MNDM - March 10, 2004 - the 3 Boards of Directors (Co-Leaders) meet with Municipal Affairs to discuss a local BR+E - April 2004 - the 3 Boards agree to a joint venture contingent upon outside funding - May 2004 - draft a proposal with budget - June - August 2004 - develop local portion of the survey - September/October - align resource task force - September 2004 - funding approved - October 2004 - Hire co-ordinator - November 2-4,2004 - BR+E Consultant training - October/November - develop marketing strategy - January 2005 - Schedule volunteer training sessions - January - April 2005 - Business visitations -
GSDC and City of Greater Sudbury lead the exercise - SMTAB facilitates, assists or initiates committees not currently present - sectoral advisory groups	LOCAL INDUSTRY COMMITTEES in the targeted areas identified by the community related to the five engines: - mining sector supply and service - environment - tourism/hospitality - health/biotechnology - apprenticeship - self-employment - technology	- To begin immediately and continue - Each Committee determines its meeting times, aims and objectives separately
The City of Greater Sudbury - Lead - Heritage Canada	DIVERSITY THRIVES HERE ! - *Conversation Cafes* - *Community Mapping* - *Building Bridges to the Native Community* - *Youth Leadership Training* - *Capacity Building Forum* - *Coalition Building Forum* - *Diversity Summit* - *Action Plan for Diversity*	- April 2004 - Hire Co-ordinator - May 25, 2004 - Native Groups - May to June 2004 - collect information - September 22, 2004 - Youth - September 23, 2004 - SWOT analysis by Stakeholders - October 15, 2004 - Coalitions - November 26 & 27, 2004 - Summit - December 2004 - Analysis and develop report - January 2005 - Submit report and recommendations
SMTAB - lead - Business sector - Education sector - Government sector - Non-Governmentt Organizations (NGO's)	SKILLS SYMPOSIUM bringing together business & labour, government, non-government organizations, educators & parents to determine specific actions to address skill shortages	February 2005
SMTAB delivers the program - funded by the Ministry of Education - supported by Ministry of Training Colleges and Universities (MTCU) - Business and Education sectors	PASSPORT TO PROSPERITY (P2P): An Employer Recruitment Strategy a program funded by the Ministry of Education and supported by the Ministry of Training, Colleges and Universities, asks employers to involve themselves in the schools through job shadowing, mentoring, workplace tours, taking co-op or apprenticeship students, being guest speakers in the classroom or similar activities. The program is administered through SMTAB.	Annual funding July to June
EDUCATION MAESTROS Directors of Education, School Board Chairs and Post-secondary Presidents where all seven educational institutions are represented (currently meet annually - arranged through SMTAB)	Investigate the possibility of adapting Pistage COLOMBO (a data collection method currently used by all 12 French School Boards) into an English format	
EDUCATION CO-ORDINATING TEAM The ECT, chaired by SMTAB and composed of representatives from all seven educational institutions, meets monthly		

TOP Planning Chart

ISSUE

<table>
<tr><td colspan="2">Low In-migration
Includes all groups or individuals who move to reside in this area, foreign and domestic.
'Immigrants' refers to those who enter the area from out-of-country.</td></tr>
<tr><td>FACTS:
- 83 immigrants located here in 2003
- Targeted skills sets sought - generally job specific
- Not a destination of choice for immigrants
- Sudbury not on the radar screen at entry-point immigrant centres
- Low return rate of Youth who leave
- Unemployment numbers discourage in-migration
- Aboriginal Youth numbers are growing</td><td>COMMUNITY IMPACT:
- Skills in labour pool inadequate to meet employer needs
- Vibrant ethnic and cultural communities are not developing</td></tr>
</table>

<table>
<tr><td rowspan="2">PRIORITY
(as identified by the community)</td><td>HIGH</td><td colspan="2">MEDIUM</td><td>LOW</td></tr>
<tr><td colspan="2">LONG TERM</td><td colspan="2">SHORT TERM</td></tr>
<tr><td>NEXT STEP (S)/ PROPOSED ACTION</td><td colspan="4">- Diversity Thrives Here! Website to be established
- Build coalitions within the community
- Youth Leadership training
- Inventory available services and gaps
- Community capacity building in Youth, aboriginal and Francophone communities
- Establish a community working group
- Culmination in a Diversity Summit
- Make recommendations to City and Federal government</td></tr>
<tr><td>PARTNERS (Lead first)</td><td colspan="4">City of Greater Sudbury – funded through Canadian Heritage</td></tr>
<tr><td>TIMELINES</td><td colspan="4">- April 2004 to December 31, 2004
- April 04 – hire co-ordinator
- Community sessions – October, November
- Strategic planning community meeting – November 2004
- Recommendations submitted – January 2005</td></tr>
<tr><td>EXPECTED RESULTS/ OUTCOMES</td><td colspan="4">-</td></tr>
<tr><td>CURRENT STATUS</td><td colspan="4"></td></tr>
<tr><td>DATE</td><td colspan="4"></td></tr>
</table>

Section 4: Next Steps

Community groups have confirmed the collected labour market information and have collectively determined the local priorities <u>as they relate to workforce development</u>.

Those issues are summarized in the centrefold pullout section.

As can be seen, the concerns identified at our community consultations have been with us for a long time and they will not be resolved overnight. However, each agency, group or institution is trying to address the skills needs of our community in diverse ways. Each little piece chinks away at the armour of workplace skills development specific to Northern Ontario and the Sudbury and Manitoulin Districts.

Each organization has developed its short and long-term strategic plans and is aware of the activities, events and programs that might address a part of any or all the issues that lead to the development of a local skills pool.

Each agency or group is now asked to provide a brief outline of any and all activities, events or programs that address any of the identified issues.

Two sample **Trends, Opportunities and Priorities (TOP) Charts** have been provided as **guidelines**.

Blank TOP Charts, one for each of the major issues, is provided for your use. Please make as many copies as you may need or copy the form and save electronically. Fill them in as per the specified categories (bullet points are all that is necessary) and send them back to SMTAB by
Tuesday, September 14th by fax or e-mail.

* * * PLEASE FORWARD TO THE APPROPRIATE DEPARTMENTS * * *

As information from each agency and/or community group is received, the activities or events will be added to the chart so that a Community Action Plan will be developed from the information received.

Obviously, the TOP Chart for our community will only be as good as the information we receive.

SMTAB will call to confirm receipt of activity data and will forward a completed ACTION PLAN to all community stakeholders who have participated.

TOP Planning Chart

ISSUE

<table>
<tr><td colspan="6">High Out-Migration / Aging Population
Youth out-migration is the most noticeable with drastic declines from ages 0 to 34 over the period 1991 to 2001. Significant growth in the 50+ age group. How do we retain our population?</td></tr>
<tr><td colspan="3">FACTS:
- Population in continuous decline - annual 5% net loss
- Aging population to surpass youth in 2011
- Youth leave for post-secondary elsewhere
- Self-employment not seen as a career
- Lack of human resource replacement planning</td><td colspan="3">COMMUNITY IMPACT:
- Skill levels in local labour pool are poor
- Severe effect on economic growth
- Job creation limited by skills available
- Have not been able to create or sustain the
- ‘Bohemian’ factor</td></tr>
<tr><td rowspan="2">PRIORITY
(as identified by the community)</td><td colspan="2">HIGH</td><td colspan="2">MEDIUM</td><td>LOW</td></tr>
<tr><td colspan="2">LONG TERM</td><td colspan="3">SHORT TERM</td></tr>
<tr><td>NEXT STEP (S)/
PROPOSED ACTION</td><td colspan="5"></td></tr>
<tr><td>PARTNERS (Lead first)</td><td colspan="5"></td></tr>
<tr><td>TIMELINES</td><td colspan="5"></td></tr>
<tr><td>EXPECTED RESULTS/
OUTCOMES</td><td colspan="5"></td></tr>
<tr><td>CURRENT STATUS</td><td colspan="5"></td></tr>
</table>

DATE September 30, 2004	

TOP Planning Chart

ISSUE

Low In-migration

Includes all groups or individuals who move to reside in this area, foreign and domestic. 'Immigrants' refers to those who enter the area from out-of-country.

FACTS:	**COMMUNITY IMPACT:**
- 83 immigrants located here in 2003 - Targeted skills sets sought - generally job specific - Not a destination of choice for immigrants - Sudbury not on the radar screen at entry-point immigrant centres - Low return rate of Youth who leave - Unemployment numbers discourage in-migration - Aboriginal Youth numbers are growing	- Skills in labour pool inadequate to meet employer needs - Vibrant ethnic and cultural communities are not developing

PRIORITY (as identified by the community)	**HIGH**	**MEDIUM**	**LOW**
	LONG TERM		**SHORT TERM**
NEXT STEP (S)/ PROPOSED ACTION			
PARTNERS (Lead first)			
TIMELINES			
EXPECTED RESULTS/ OUTCOMES			

CURRENT STATUS		
DATE	September 30, 2004	

TOP Planning Chart

ISSUE

Skills Shortages Education levels and training availability significantly impact the skills available within the local labour pool. The lack of skills succession planning by employers must be addressed.	
FACTS: - Higher illiteracy rates in this area - Customer service skills identified as poor - Lack of succession planning around training and attrition - Lack of info for the technology sector - Larger employers recruit skilled personnel from smaller operations (SME's) - Cost and time for smaller employers reduces the amount of training done - Seasonal and economic influences are a major factor - Short term, job-specific training not available for numerous small employers	**COMMUNITY IMPACT:** - Four areas where shortages are identified will impact economic growth Skilled Trades Computer Sector Health Careers Technology - Lower sets of skills available to the labour market - Local training opportunities minimized - Significant impact on smaller employers - Fewer local apprenticeship opportunities - Reduces local training and apprenticing

PRIORITY (as identified by the community)	**HIGH**	**MEDIUM**	**LOW**
	LONG TERM	**SHORT TERM**	
NEXT STEP (S)/ PROPOSED ACTION			
PARTNERS (Lead first)			
TIMELINES			
EXPECTED RESULTS/ OUTCOMES			

CURRENT STATUS		
DATE	September 30, 2004	