Local Labour Market Plan

Waterloo Wellington Dufferin
2011

Trends, Opportunities, Priorities

Workforce Planning Board
of Waterloo Wellington Dufferin

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The Workforce Planning Board of Waterloo Wellington Dufferin (WPB) covers one of twenty-five (25) local planning zones across Ontario. Our role is to engage communities and community partners in local labour market development. WPB is responsible for communities across Waterloo Region, Wellington County and Dufferin County. Our neutral position within the community allows us to act as a mechanism to bring together divergent labour market partners (labour, business, service providers, education/training, economic development, equity groups) to develop local solutions to local workforce development issues.

In operation since 1997, The Workforce Planning Board is a community directed, non-profit corporation leading Waterloo Region, Wellington County and Dufferin County in their approach to workforce development and labour market planning.

Our Vision: We envision the continuous development of a leading edge workforce.

Our Mission: Engage partners to find solutions to local workforce development needs.

This Employment Ontario Project is funded by the Government of Ontario.

EMPLOYMENT ONTARIO

The views expressed in this document do not necessarily reflect those of Employment Ontario
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We would like to express our thanks to all those who participated in the development of this report.

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Executive Summary

The last couple of years have been hard on local employment however, we are seeing employment levels increase in most of the communities within the Waterloo Wellington Dufferin planning zone with the exception of Guelph, which has seen a dramatic decline in the labour force over the past few months.

Last year's report focused on labour market demand in a number of industries including several manufacturing industries which were hit hard by the recession. This current report provides an update on all of these industries. Industry updates are provided for the following industries including:

- NAICS 111/112 – Crop/Animal Production
- NAICS 332 – Fabricated Metal Product Manufacturing
- NAICS 311 – Food Manufacturing
- NAICS 326 – Plastics and Rubber Product Manufacturing
- NAICS 336 – Transportation Equipment Manufacturing
- NAICS 541 – Professional, Scientific and Technical Services

This report will also look at two new industries facing challenges and opportunities. The first is Truck Transportation (NAICS 484) which is experiencing employment challenges and the second is Finance/Insurance (NAICS 523/524) where we are seeing an increase in local employment opportunities. This report will also include information on local issues regarding labour market supply.

We have focused this report mainly on Small and Medium sized Enterprises (SME) with under 100 employees in the identified industries. We have also incorporated larger industry data where local knowledge has indicated a need for more information.

Consultation Process

Since the labour market planning process is continuous, ongoing information is gathered through participation and involvement in local committees and community events. Examples include the Guelph Inclusiveness Alliance, Community Employment Linkages Committee and the Employment and Income Support Advisory Committee (Waterloo Region). Events such as the Lens on Local Industry series have also provided valuable information to the planning process.

Since December 2010, a more formal process of developing this report has required the following methodology:

- Review of year over year statistical information from Labour Market Indicators
- Review of local municipal economic development strategies
- Development of industry pre-consultation documents
- One on one interviews with industry key informants
- Three consultation meetings with employment service providers
- Two community consultations in Cambridge and Guelph
- Draft review with local Ministry of Training, Colleges and Universities staff

Actions identified in the Action Plan starting on page 30 will be monitored by the Workforce Planning Board to provide future updates on relevant actions and activities over the coming year.

Waterloo Wellington Dufferin – The Big Picture

Employment by Industry

The closest we can get to monthly/annual employment figures for the entire planning zone of Waterloo Wellington Dufferin is through Statistics Canada's Monthly Labour Force Survey. This data provides employment information by industry sector. We will provide some breakdown for sub-industries at the 3-digit level of North American Industry Classification System (NAICS) in later sections of the report.

Table 1 **Employment by Industry**
Economic Region 540[1] – 2008-2010

Industry	2008	2009	2010	Abs Change 2008-2010
Total employed (K)[2]	**661.8**	**646.6**	**663.0**	**+1.2**
Goods-producing sector	**187.2**	**185.5**	**185.1**	**-2.1**
Agriculture	9.4	14.2	12.5	+3.1
Forestry, fishing, mining, oil and gas	X[3]	1.6	2.0	+2.0
Utilities	4.4	5.3	4.3	-0.1
Construction	46.3	50.4	51.4	+5.1
Manufacturing	125.8	114.1	114.9	-10.9
Services-producing sector	**474.6**	**461.1**	**477.9**	**+3.3**
Trade	105.6	99.7	104.7	-1.5
Transportation and warehousing	30.2	26.7	29.7	-0.5
Finance, insurance, real estate and leasing	36.4	38.4	41.2	+4.8
Professional, scientific and technical services	36.1	36.0	39.5	+3.4
Business, building and other support services	25.7	22.4	27.7	+2.0
Educational services	57.5	55.5	52.0	-5.5
Health care and social assistance	61.3	67.5	61.3	0
Information, culture and recreation	26.5	22.8	24.5	-2.0
Accommodation and food services	39.6	39.2	42.6	+3.0
Other services	28.4	26.8	30.4	+2.0
Public administration	27.3	26.1	24.3	-3.0

Manufacturing employment fell dramatically during the recession but has stabilized. A variety of employment opportunities are appearing in this sector, particularly in green technology areas such as solar and a number of local employers are actively hiring at the time this report is being written. With three (3) Universities and three (3) Colleges with multiple campuses, it is somewhat surprising that the second largest decline was in Educational services.

As of January 2011, we now have access to data for two (2) Census Metropolitan Areas. Their coverage areas are as follows:
Kitchener CMA (KCMA) – Waterloo Region minus the Townships of Wilmot and Wellesley
Guelph CMA (GCMA) – The City of Guelph and the Township of Guelph Eramosa

Having access to this data will enable us to develop more detailed trend lines for these communities.

1 Economic Region 540 ER540 covers the counties of Waterloo Wellington Dufferin and Simcoe
2 K = 000's
3 X = Numbers suppressed - not available

Labour Market Supply

During consultations with the community and service providers regarding labour market supply, several concerns were raised including the mismatch of skills and current employment requirements. This includes evidence that increasing social services (Ontario Works) caseloads may be the result of workers who lost their jobs during the recession and have been unable to find new employment. We already know that many of the manufacturing labourers displaced during the recession had less than grade 12 education levels. If these displaced workers are now appearing on Ontario Works caseloads, they will likely require immediate access to academic and literacy upgrading. Others have left the labour force entirely as appears to be the case in Wellington County. Long term unemployed youth are also becoming disengaged.

Many potential workers have unrealistic expectations of the skill requirements of various industries and/or how much can realistically be earned with minimal skill levels. Other issues impacting potential workers include the need for flexibility in working hours, particularly with respect to availability of childcare and transportation.

Access to training for older workers through the Targeted Initiative for Older Workers (TIOW) is available only in selected communities across the planning zone with populations of over 250,000. An issue that has been raised is around the distinction between types of certification which can or cannot be supported versus employment training.

Front line staff with local service providers need to have quick access to the most up to date information as to where employment opportunities exist today or in the near future in order to be able to direct clients to the most appropriate training. The Workforce Planning Board will be developing a series of labour market workshops for front line employment services and social services staff over the next few months. Also, there is recognition of the need to develop a more collaborative approach when working to link clients with potential employers.

What's Happening in Waterloo Region?

Labour Force

Table 2 Employment by Industry

Kitchener CMA	2008	2009	2010
Total employed (K)[4]	**259.9**	**255.4**	**263.7**
Goods-producing sector	**73.8**	**70.9**	**72.3**
Agriculture	1.8	2.2	X[5]
Forestry, fishing, mining, quarrying, oil and gas	X	X	X
Utilities	1.8	1.8	X
Construction	17.1	16.2	15.7
Manufacturing	52.7	50.4	53.7
Services-producing sector	**186.1**	**184.5**	**191.5**
Trade	40.6	37.7	39.3
Transportation and warehousing	11.6	8.6	10.9
Finance, insurance, real estate and leasing	18.9	18.8	22.3
Professional, scientific and technical services	15.8	16.5	17.6
Business, building and other support services	9.4	9.2	10.8
Educational services	27.5	29.0	24.2
Health care and social assistance	20.2	23.4	22.3
Information, culture and recreation	9.2	8.3	8.8
Accommodation and food services	13.8	15.0	15.8
Other services	11.0	10.0	11.5
Public administration	8.3	8.1	8.1

Table 3 KCMA Labour Force

Kitchener CMA (Adjusted)	February 2009	February 2010	February 2011
Population (K)	385.8	390.9	405.7
Labour Force (K)	278.9	273.7	290.4
Employment (K)	253.4	246	271.3
Unemployment (K)	25.5	27.7	19.1
Participation Rate %	72.3	70.0	71.6
Unemployment Rate %	9.1	10.1	6.6
Employment Rate %	65.7	62.9	66.9

Although Waterloo Region was hit hard by the recession, the diversity of industry sectors has allowed the Region to recover much more quickly than in other jurisdictions. As the population has increased in KCMA, so has the labour force. The unemployment rate has not returned to pre-recession levels but is getting closer, dropping steadily month over month. The employment rate is also increasing.

4 K = 000's
5 X = Numbers suppressed - not available

Table 4 Migration Characteristics 2003 to 2008 - Waterloo

Age Group	In-migrants	Out-migrants	Net-migrants
0 - 17	21,242	16,830	4,412
18 - 24	17,522	12,729	4,793
25 - 44	43,400	33,710	9,690
45 - 64	12,425	12,461	-36
65 +	5,310	4,263	1,047
Total	**99,899**	**79,993**	**19,906**

Source: Statistics Canada, Taxfiler

From 2001 to 2006, the number of net-migrants was +24,420. From 2003-2008, Waterloo Region continued to have high in-migration numbers among younger populations however the number of out-migrants exceeded the number of in-migrants in the 45-64 age range. This is the first time in several years where we are seeing the number of net migrants in any category in a minus situation. This may warrant further investigation.

Business Patterns

Table 5 Number of Businesses by Size Range

Employee Size Range	Number of Businesses Dec 2008	Number of Businesses Dec 2010	Absolute Change	Percent Change (%)
0	16,947	17,763	816	4.8
1 - 4	7,131	7,652	521	7.3
5 - 9	3,244	3,254	10	0.3
10 - 19	1,994	2,107	113	5.7
20 - 49	1,401	1,426	25	1.8
50 - 99	457	465	8	1.7
100 - 199	230	201	-29	-12.6
200 - 499	120	121	1	0.8
500 +	45	41	-4	-8.9
Total	**31,569**	**33,030**	**1,461**	**4.6**

We have seen an increase of 1,461 businesses across all employee size ranges in the two years from 2008 to 2010. The number of employers declined by four (4) in those with over 500+ employees and by 29 in the 100-199 employee size range. Almost half of these businesses have between 1 and 50 employees. The number of self employed has risen by 816 or almost 5%.

The percent change in the total number of businesses in Waterloo Region is 4.6% while, for comparison, Ontario's percent change is only 1.7%, Wellington is 0.3% and Dufferin is 3.8%.

Growth/Decline in Industry Sectors

Table 6 Top 10 Business Growth 2008-2010

NAICS	Total Businesses 2008	Total Businesses 2010	Absolute Change	Percent Change (%)
531 - Real Estate	2,785	3,238	453	16.27
112 - Animal Production	822	1,141	319	38.81
621 - Ambulatory Health Care Services	1,233	1,379	146	11.84
623 - Nursing and Residential Care Facilities	93	213	120	129.03
238 - Specialty Trade Contractors	2,434	2,536	102	4.19
111 - Crop Production	234	321	87	37.18
561 - Administrative and Support Services	1,283	1,355	72	5.61
236 - Construction of Buildings	985	1,052	67	6.80
813 - Religious, Grant-Making, Civic, and Professional and Similar Organizations	803	868	65	8.09
722 - Food Services and Drinking Places	1,011	1,067	56	5.54

Table 7 Top 10 Business Decline 2008-2010

NAICS	Total Businesses 2008	Total Businesses 2010	Absolute Change	Percent Change (%)
551 - Management of Companies and Enterprises	1,669	1,601	-68	-4.07
447 - Gasoline Stations	224	179	-45	-20.09
484 - Truck Transportation	1,199	1,155	-44	-3.67
418 - Miscellaneous Wholesaler-Distributors	285	259	-26	-9.12
532 - Rental and Leasing Services	253	231	-22	-8.70
711 - Performing Arts, Spectator Sports and Related Industries	204	183	-21	-10.29
333 - Machinery Manufacturing	284	267	-17	-5.99
541 - Professional, Scientific and Technical Services	4,004	3,988	-16	-0.40
517 - Telecommunications	55	40	-15	-27.27
414 - Personal and Household Goods Wholesaler-Distributors	213	201	-12	-5.63

Change in Employment

Table 8 indicates SME industries which have seen a decline of more than 200 jobs since 2008. Not surprisingly, two (2) of the three (3) are in the manufacturing sector, while the third, Truck Transportation will be reviewed in more detail in the Industry Profiles section.

Table 8 **SME Employment Decline (under 100 employees)**

NAICS	# Employed 2008	# Employed 2010	Absolute Change	Percent Change (%)
333 - Machinery Manufacturing	3,348	2,859	-489	-14.61
332 - Fabricated Metal Product Manufacturing	4,374	4,029	-344	-7.87
484 - Truck Transportation	3,985	3,710	-275	-6.90

Table 9 shows those SME industries where more than 200 jobs have been created since 2008. The highest job creation has been in Food Services, with 1,348 new jobs and Nursing and Residential Care Facilities, with 1,223 jobs, an increase of almost 75%.

Table 9 **SME Employment Growth (under 100 employees)**

NAICS	# Employed 2008	# Employed 2010	Absolute Change	Percent Change (%)
722 - Food Services and Drinking Places	13,959	15,307	1,348	9.66
623 - Nursing and Residential Care Facilities	1,653	2,876	1,223	73.96
112 - Animal Production	1,376	1,805	429	31.18
416 - Building Material and Supplies Whole.-Dist.	2,172	2,455	282	13.00
561 - Administrative and Support Services	6,046	6,307	261	4.32
446 - Health and Personal Care Stores	2,048	2,277	230	11.23
621 - Ambulatory Health Care Services	4,993	5,200	207	4.14

What's Happening in Wellington County?

Labour Force

Labour force data for the entire County is not collected by Statistics Canada, but is part of the larger Economic Region 540 which covers Waterloo, Wellington, Dufferin and Simcoe counties. Only the Guelph Metropolitan Area (GCMA) (consisting of the City of Guelph and the Township of Guelph Eramosa) data is available separately.

Table 10 **Employment by Industry**

Guelph CMA	2008	2009	2010
Total employed (K)[6]	**77.4**	**75.3**	**75.5**
Goods-producing sector	**21.9**	**19.8**	**17.0**
Agriculture	X[7]	X	X
Forestry, fishing, mining, quarrying, oil and gas	X	X	X
Utilities	X	X	X
Construction	2.7	3.6	3.3
Manufacturing	18.1	14.9	12.7
Services-producing sector	**55.5**	**55.5**	**58.5**
Trade	11.2	11.3	10.2
Transportation and warehousing	3.0	2.4	2.3
Finance, insurance, real estate and leasing	4.4	4.8	4.0
Professional, scientific and technical services	4.7	6.2	5.9
Business, building and other support services	2.4	2.1	2.3
Educational services	9.0	8.3	10.4
Health care and social assistance	7.1	7.7	7.9
Information, culture and recreation	2.8	2.6	3.2
Accommodation and food services	4.6	4.5	5.3
Other services	2.6	2.4	3.4
Public administration	3.8	3.2	3.6

The lack of diversity of employment, particularly in Manufacturing in Guelph, has had a much more dramatic impact on the community than perhaps in other jurisdictions. We see a slight increase in population as expected however the labour force has shrunk dramatically over the past several months. This is an indicator that many people have simply stopped looking for work. The employment rate has dropped by almost 7% from previous average annual levels. This lack of labour market participation is a major concern and could indicate a serious skills mismatch. Although some displaced workers may currently be involved in further education and therefore not counted, this also likely indicates that older laid off workers have given up and opted for retirement. At the other end of the spectrum, young people have become disengaged from the workforce. This could have a serious impact on the supply of labour in Wellington County.

6 K = 000's
7 X = Numbers suppressed - not available

Table 11 GCMA Labour Force

Guelph CMA (Adjusted)	February 2009	February 2010	February 2011
Population (K)	109.8	111.3	112.7
Labour Force (K)	83.4	84.8	77.6
Employment (K)	77.7	77.1	72.3
Unemployment (K)	6.3	7.6	5.2
Participation Rate %	76.0	76.2	68.9
Unemployment Rate %	7.6	9.0	6.7
Employment Rate %	70.2	69.3	64.2

The closest indicator for the remaining municipalities within Wellington County is to use Economic Region 540 (ER540) data with the large metropolitan area data removed as can be seen in Table 12.

Table 12 ER540 Labour Force (Minus KCMA, GCMA and Barrie CMA)

ER540 minus KCMA, GCMA and Barrie CMA	February 2009	February 2010	February 2011
Population (K)	340.8	345.8	351.5
Labour Force (K)	239.4	235.5	245.9
Employment (K)	222.2	215.7	223.2
Unemployment (K)	17.4	19.8	22.8
Participation Rate %	70.2	68.1	70.0
Unemployment Rate %	7.3	8.4	9.3
Employment Rate %	65.2	62.4	63.5

Table 13 Migration Characteristics 2003 to 2008 - Wellington

Age Group	In-migrants	Out-migrants	Net-migrants
0 - 17	10,504	8,623	1,881
18 - 24	8,101	7,317	784
25 - 44	20,924	17,903	3,021
45 - 64	7,645	7,027	618
65 +	3,538	2,896	642
Total	**50,712**	**43,766**	**6,946**

Source: Statistics Canada, Taxfiler

From 2001 to 2006, the number of net-migrants in Wellington County was +9,027. Although the number of net-migrants has decreased from 2003 to 2008, the 25-44 age group is still attracting most new in-migrants which is healthy for the labour force.

Business Patterns

Table 14 **Number of Businesses by Size Range**

Employee Size Range	Number of Businesses	Number of Businesses	Number of Businesses	Absolute Change 2008-2009	Absolute Change 2008-2010	Percent Change (%) 2008-2010
0	8,672	7,705	8,627	-967	-45	-0.52
1 - 4	3,299	3,130	3,438	-169	139	4.21
5 - 9	1,389	1,279	1,380	-110	-9	-0.65
10 - 19	858	831	836	-27	-22	-2.56
20 - 49	583	538	588	-45	5	0.86
50 - 99	174	162	162	-12	-12	-6.90
100 - 199	99	91	88	-8	-11	-11.11
200 - 499	45	51	48	6	3	6.67
500 +	16	15	15	-1	-1	-6.25
Total	**15,135**	**13,802**	**15,182**	**-1,333**	**47**	**0.31**

Since 2008 we have seen an increase of only 47 businesses in Wellington County. 2009 was a very bad year for business decline. Fortunately, we see a slight rebound by December 2010 among very small businesses to bring us back to approximately 2008 levels however there is still decline in both smaller and larger establishments. Although still positive, Wellington's percent change is only 0.31%. For comparison, Ontario's percent change is 1.7%, Waterloo is 4.6% and Dufferin is 3.8%.

Growth/Decline in Industry Sectors

Table 15 Top 10 Business Growth 2008-2010

NAICS	Total Businesses 2008	Total Businesses 2010	Absolute Change	Percent Change (%)
531 - Real Estate	1,089	1,252	163	14.97
621 - Ambulatory Health Care Services	521	609	88	16.89
541 - Professional, Scientific and Technical Services	1,823	1,874	51	2.80
238 - Specialty Trade Contractors	983	1,024	41	4.17
813 - Religious, Grant-Making, Civic, and Professional and Similar Organizations	333	363	30	9.01
561 - Administrative and Support Services	571	591	20	3.50
623 - Nursing and Residential Care Facilities	54	74	20	37.04
454 - Non-Store Retailers	41	60	19	46.34
624 - Social Assistance	88	105	17	19.32
814 - Private Households	78	93	15	19.23

Table 16 Top 10 Business Decline by 2008-2010

NAICS	Total Businesses 2008	Total Businesses 2010	Absolute Change	Percent Change (%)
112 - Animal Production	1,551	1,335	-216	-13.93
551 - Management of Companies and Enterprises	685	634	-51	-7.45
484 - Truck Transportation	442	412	-30	-6.79
447 - Gasoline Stations	108	86	-22	-20.37
337 - Furniture and Related Product Manufacturing	58	41	-17	-29.31
332 - Fabricated Metal Product Manufacturing	142	127	-15	-10.56
333 - Machinery Manufacturing	96	82	-14	-14.58
492 - Couriers and Messengers	43	29	-14	-32.56
417 - Machinery, Equipment and Supplies Wholesaler-Distributors	201	189	-12	-5.97
451 - Sporting Goods, Hobby, Book and Music Stores	97	85	-12	-12.37

Change in Employment

Table 17 shows that six (6) SME industries have lost more than 200 jobs since December 2008 with Animal Production leading the job loss with more than 600 jobs lost.

Table 17 **SME Employment Decline (under 100 employees)**

NAICS	# Employed 2008	# Employed 2010	Absolute Change	Percent Change (%)
112 - Animal Production	2,170	1,556	-614	-28.31
561 - Administrative and Support Services	2,625	2,224	-401	-15.26
484 - Truck Transportation	1,546	1,158	-388	-25.08
333 - Machinery Manufacturing	1,184	805	-379	-32.02
722 - Food Services and Drinking Places	5,279	4,996	-283	-5.36
417 - Machinery, Equipment and Supplies W/D	1,439	1,184	-256	-17.76

Table 18 **SME Employment Growth (under 100 employees)**

NAICS	# Employed 2008	# Employed 2010	Absolute Change	Percent Change (%)
551 - Management of Companies and Enterprises	1,419	1,513	94	6.63
623 - Nursing and Residential Care Facilities	1,275	1,361	86	6.73
713 - Amusement, Gambling and Recreation Ind.	709	791	82	11.50
237 - Heavy and Civil Engineering Construction	715	791	76	10.63
327 - Non-Metallic Mineral Product Manufacturing	287	350	63	21.87
115 - Support Activities for Agriculture and Forestry	360	415	55	15.31
453 - Miscellaneous Store Retailers	592	644	53	8.93
541 - Professional, Scientific and Technical Ser.	4,871	4,921	51	1.04

In Wellington County in SME's, the highest number of jobs created by a single industry was 94 and only eight (8) industries created 50 jobs or more from December 2008 to June 2010.

Wellington County has recently struck a new committee comprised of representatives from economic development and municipal offices. The Wellington County Municipal Economic Development Group intends to develop an Economic Development Strategic Plan for the County which will also likely identify workforce development strategies that can be incorporated into future labour market plans.

What's Happening in Dufferin County?

Labour Force

Although we can't break out monthly employment data specifically for Dufferin County, we can get a good idea of what's happening by using the Economic Region 540 data with the information pertaining to the largest municipal areas (i.e. KCMA and the new Guelph and Barrie CMAs) removed.

Table 19 **ER540 Labour Force (Minus KCMA, GCMA and Barrie CMA)**

ER540 minus KCMA, GCMA and Barrie CMA	February 2009	February 2010	February 2011
Population (K)[8]	340.8	345.8	351.5
Labour Force (K)	239.4	235.5	245.9
Employment (K)	222.2	215.7	223.2
Unemployment (K)	17.4	19.8	22.8
Participation Rate %	70.2	68.1	70.0
Unemployment Rate %	7.3	8.4	9.3
Employment Rate %	65.2	62.4	63.5

As the population is increasing fairly quickly, so too is the labour force. Participation rates are fairly stable but unemployment is up substantially from 2009. A decline in the number of businesses may mean that unemployed workers in Dufferin have not been able to find other local work or are now working outside the area.

Table 20 **Migration Characteristics 2003 to 2008 - Dufferin**

Age Group	In-migrants	Out-migrants	Net-migrants
0-17	3,708	3,277	431
18-24	1,725	2,286	-561
25-44	6,088	5,072	1,016
45-64	2,644	2,743	-99
65+	1,199	1,041	158
Total	15,364	14,419	945

Source: Statistics Canada, Taxfiler

From 2001 to 2006, the number of net-migrants was +2,134. From 2003 to 2008, that number has dropped to 945. This could create challenges for the labour force by limiting supply however most growth is still in the 24-44 age group which is positive. The number of net-migrants in the 18-24 age group has more than doubled from 2001-2006 numbers so hopefully this means that more young people are leaving for education purposes and then returning to the community when part of the 25-44 age group.

8 K = 000's

Business Patterns

Table 21 **Number of Businesses by Size Range**

Employee Size Range	Number of Businesses 2008	Number of Businesses 2010	Absolute Change	Percent Change (%)
0	2,462	2,330	-132	-5.36
1 - 4	941	1,011	70	7.44
5 - 9	370	390	20	5.41
10 - 19	217	207	-10	-4.61
20 - 49	125	123	-2	-1.60
50 - 99	42	38	-4	-9.52
100 - 199	17	17	0	0.00
200 - 499	9	8	-1	-11.11
500 +	0	0	0	0.00
Total	**4,183**	**4,341**	**158**	**3.78**

We are seeing growth in businesses with 1-4 and 5-9 employees which could be a result of owner operators hiring additional staff as they grow, which is a positive indicator. As in other jurisdictions, SME businesses are the only ones where we are seeing growth in the number of businesses. Total business growth is almost 4%, while Waterloo is at 4.6% and Guelph at 0.3% so overall, Dufferin County is holding its own compared to Ontario where business growth is only 1.7%.

Growth/Decline in Industry Sectors

Table 22 Top 10 Business Growth 2008-2010

NAICS	Total Businesses 2008	Total Businesses 2010	Absolute Change	Percent Change (%)
531 - Real Estate	298	329	31	10.40
523 - Securities, Commodity Contracts, and Other Financial Investment and Related Activities	94	104	10	10.64
561 - Administrative and Support Services	220	228	8	3.64
814 - Private Households	28	36	8	28.57
722 - Food Services and Drinking Places	104	111	7	6.73
811 - Repair and Maintenance	170	177	7	4.12
111 - Crop Production	70	75	5	7.14
454 - Non-Store Retailers	19	22	3	15.79
485 - Transit and Ground Passenger Transportation	7	10	3	42.86
524 - Insurance Carriers and Related Activities	29	32	3	10.34

Table 23 Top 10 Business Decline 2008-2010

NAICS	Total Businesses 2008	Total Businesses 2010	Absolute Change	Percent Change (%)
112 - Animal Production	230	204	-26	-11.30
551 - Management of Companies and Enterprises	148	133	-15	-10.14
484 - Truck Transportation	195	184	-11	-5.64
237 - Heavy and Civil Engineering Construction	64	54	-10	-15.63
541 - Professional, Scientific and Technical Services	486	476	-10	-2.06
441 - Motor Vehicle and Parts Dealers	39	31	-8	-20.51
417 - Machinery, Equipment and Supplies Wholesaler-Distributors	55	48	-7	-12.73
447 - Gasoline Stations	27	20	-7	-25.93
713 - Amusement, Gambling and Recreation Industries	41	35	-6	-14.63
238 - Specialty Trade Contractors	402	397	-5	-1.24

Change in Employment

Table 24 shows those SME industries which have lost more than 50 jobs since 2008.

Table 24 **SME Employment Decline (under 100 employees)**

NAICS	# Employed 2008	# Employed 2010	Absolute Change	Percent Change (%)
561 - Administrative and Support Services	1,024	896	-128	-12.47
441 - Motor Vehicle and Parts Dealers	521	456	-64	-12.34
238 - Specialty Trade Contractors	1,188	1,127	-61	-5.17
484 - Truck Transportation	414	361	-53	-12.74

Table 25 shows those industries where 50 or more jobs have been created since 2008.

Table 25 **SME Employment Growth (under 100 employees)**

NAICS	# Employed 2008	# Employed 2010	Absolute Change	Percent Change (%)
111 - Crop Production	251	348	97	38.68
811 - Repair and Maintenance	434	508	74	16.94
326 - Plastics and Rubber Products Man.	208	280	72	34.59
112 - Animal Production	375	445	71	18.83
611 - Educational Services	168	221	53	31.78
541 - Professional, Scientific and Technical Ser.	925	976	50	5.44
237 - Heavy and Civil Engineering Construction	228	278	50	21.97
623 - Nursing and Residential Care Facilities	177	227	50	28.32

Industry Analysis

Updates from Last Report – 2010

The 2010 planning report highlighted employment information and action strategies on several local industries where statistical analysis and key informant feedback indicated workforce development challenges and opportunities.

Those industries included:

- NAICS 111/112 – Crop/Animal Production
- NAICS 332 – Fabricated Metal Product Manufacturing
- NAICS 311 – Food Manufacturing
- NAICS 326 – Plastics and Rubber Product Manufacturing
- NAICS 336 – Transportation Equipment Manufacturing
- NAICS 541 – Professional, Scientific and Technical Services

This section will provide a brief update on the current status of these industries.

Agriculture: Crop Production – NAICS 111 / Animal Production – NAICS 112

Crop Production (NAICS 111) is comprised of establishments, such as farms, orchards, groves, greenhouses and nurseries, primarily engaged in growing crops, plants, vines, trees and their seeds (excluding those engaged in forestry operations).

Animal Production (NAICS 112) is comprised of establishments, such as ranches, farms and feedlots, primarily engaged in raising animals, producing animal products and fattening animals.

Number of Businesses

The number of Crop Production businesses increased from 655 to 676 businesses between June 2009 and June 2010. During that time, there was an increase of 15 businesses in Dufferin County, an increase of 85 businesses in Waterloo Region but a decrease of 79 businesses in Wellington County. The total number of businesses rose to 744 in December 2010.

Table 26 **NAICS 111 Crop Production**

County	# Businesses June 2009	# Businesses June 2010	# Businesses Dec 2010	Absolute Change June 2009-Dec 2010
Waterloo	236	321	321	+85
Wellington	347	268	348	+1
Dufferin	72	87	75	+3
Totals	**655**	**676**	**744**	**+89**

From June 2009 to June 2010, the number of Animal Production businesses decreased from 2,595 to 2,497. There was an increase of 35 businesses in Dufferin County and an increase of 335 in Waterloo Region however there was a decrease of 468 businesses in Wellington County. Here again, by December 2010 the total number of businesses increased overall by 85.

Table 27 **NAICS 112 Animal Production**

County	# Businesses June 2009	# Businesses June 2010	# Businesses Dec 2010	Absolute Change June 2009-Dec 2010
Waterloo	814	1,149	1,141	+327
Wellington	1,554	1,086	1,335	-219
Dufferin	227	262	204	-23
Totals	**2,595**	**2,497**	**2,680**	**+85**

Strategic actions underway or completed since last report

In November 2010, the Workforce Planning Board held an Agriculture Education and Training Forum to discuss specific educational/training challenges of those currently working in or entering the agriculture industry. The forum identified a number of training needs.

A “Growing the Food Continuum” conference, planned for May 2011 will highlight workforce development issues which could impact the entire food employment continuum.

Professional Scientific and Technical Services – NAICS 541

Professional, Scientific and Technical Services (NAICS 541) are primarily engaged in activities in which human capital is the major input. These establishments make available the knowledge and skills of their employees, often on an assignment basis.

Professional, Scientific and Technical industry is an economic development priority among all of the local municipalities who currently have economic development strategies in place.

Number of Businesses

The number of Professional, Scientific and Technical Services businesses has increased from 6,101 to 6,180 from June 2009 to June 2010. During that time there was an increase of 79 businesses in Dufferin County and an increase of 67 in Waterloo Region however there was a decrease of 9 businesses in Wellington County. By December 2010, the total number of businesses had increased by 237.

Table 28 **NAICS 541 Professional, Scientific and Technical Services**

County	# Businesses June 2009	# Businesses June 2010	# Businesses Dec 2010	Absolute Change June 2009-Dec 2010
Waterloo	3,854	3,921	3,988	+134
Wellington	1,779	1,770	1874	+95
Dufferin	468	489	476	+8
Totals	**6,101**	**6,180**	**6,338**	**+237**

Strategic actions underway or completed since last report

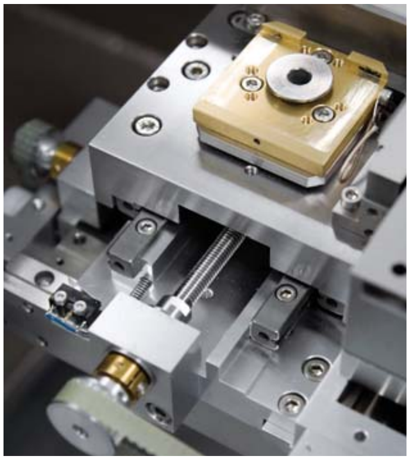
Workers in the Professional, Scientific and Technical Services are often referred to as part of the Creative Class. The Creative Class concept was developed by Dr. Richard Florida and refers to workers in the knowledge based economy. Research done in 2010 by the Workforce Planning Board for our economic development partners in Waterloo Region indicate that Creative Class employment is growing at a much faster pace here than in Ontario. However, the number of people employed within the Creative Class in Waterloo Region still lags behind Ontario as a percentage of the total labour force.

Table 29 **Example of Workers by Class - Waterloo**

Workers by Class, 2006					
		Share of Workforce		Growth Rate 2001 to 2006	
	Workers in Waterloo Region	Waterloo Region	Ontario	Waterloo Region	Ontario
Total All Occupations	238,480			12%	6%
Creative Class	74,115	31%	34%	14%	8%
Super Creative Core	39,325	17%	17%	23%	12%
Service Class	100,900	42%	45%	16%	9%
Working Class	59,210	25%	18%	3%	-2%
Fishing/Farming/Forestry	4,255	2%	2%	1%	-5%

Source: Creative Class Workers in Waterloo Region, WPB 2010

Manufacturing Industries



Advanced Manufacturing has been identified as a key economic development focus in a number of area municipalities.

Fabricated Metal Product Manufacturing (NAICS 332) establishments are primarily engaged in forging, stamping, forming, turning and joining processes to produce ferrous and non-ferrous metal products, such as cutlery and hand tools, architectural and structural metal products, boilers, tanks and shipping containers, hardware, spring and wire products, turned products, and bolts, nuts and screws.

Food Manufacturing (NAICS 311) comprises establishments primarily engaged in producing food for human or animal consumption.

Plastics and Rubber Product Manufacturing (NAICS 326) is the processing of raw rubber and plastic materials into goods, including packaging for most products, tires, hoses, and countless other rubber and plastic goods.

Transportation Equipment Manufacturing (NAICS 336) is the manufacturing of equipment for transporting people and goods, including various modes of transportation such as road, rail, air and water.

Number of Businesses

The number of Fabricated Metal Product Manufacturers (NAICS 332) declined from 499 to 496 businesses from June 2009 to June 2010. During that time there was an increase of two (2) businesses in Dufferin County and an increase of 13 in Waterloo Region however there was a decrease of 18 businesses in Wellington County. By December 2010, the total number of businesses lost overall from June 2009 was four (4).

Table 30 **NAICS 332 Fabricated Metal Product Manufacturers**

County	# Businesses June 2009	# Businesses June 2010	# Businesses Dec 2010	Absolute Change June 2009 - Dec 2010
Waterloo	332	345	344	+12
Wellington	141	123	127	-14
Dufferin	26	28	24	-2
Totals	**499**	**496**	**495**	**-4**

The number of Food Manufacturers (NAICS 311) increased from 185 to 189 businesses from June 2009 to June 2010. The number of businesses increased by one (1) and 10 respectively in Dufferin County and Waterloo Region however there was a decrease of seven (7) businesses in Wellington County. By December 2010, the total number of businesses continued to grow for a net increase overall of seven (7) businesses from 2009.

Table 31 **NAICS 311 Food Manufacturers**

County	# Businesses June 2009	# Businesses June 2010	# Businesses Dec 2010	Absolute Change June 2009 - Dec 2010
Waterloo	109	119	115	+6
Wellington	63	56	62	-1
Dufferin	13	14	15	+2
Totals	**185**	**189**	**192**	**+7**

The number of Plastics and Rubber Product Manufacturers (NAICS 326) decreased from 128 to 118 businesses from June 2009 to June 2010. Dufferin County remained stable while there was a decrease of three (3) businesses in Waterloo Region and a decrease of seven (7) businesses in Wellington County. The industry appears to have stabilized somewhat by December 2010.

Table 32 **NAICS 326 Plastics and Rubber Product Manufacturers**

County	# Businesses June 2009	# Businesses June 2010	# Businesses Dec 2010	Absolute Change June 2009 - Dec 2010
Waterloo	85	82	83	-2
Wellington	34	27	27	-7
Dufferin	9	9	9	0
Totals	**128**	**118**	**119**	**-9**

The number of Transportation Equipment Manufacturers (NAICS 336) decreased from 153 to 149 businesses from June 2009 to June 2010. Dufferin County decreased by two (2) business while Waterloo Region and Wellington County both decreased by one (1) business each. Continued decline led to a total loss of eight (8) businesses by December 2010.

Table 33 **NAICS 336 Transportation Equipment Manufacturers**

County	# Businesses June 2009	# Businesses June 2010	# Businesses Dec 2010	Absolute Change June 2009 - Dec 2010
Waterloo	83	82	82	-1
Wellington	59	58	55	-4
Dufferin	11	9	8	-3
Totals	**153**	**149**	**145**	**-8**

Strategic actions underway or completed since last report

Starting in March 2011, and throughout 2011, the Workforce Planning Board will be conducting research into the supply and demand for labour in the manufacturing sector in Wellington County. The County's manufacturing sector is much less diverse in make-up than that of neighbouring Waterloo Region. Although manufacturing employment has stabilized somewhat after the economic downturn, the number of manufacturing businesses in Wellington continues to decline.

The Workforce Planning Board has supported promoting employment opportunities in the sector through a variety of activities including Farm to Fork career awareness events and proposed job fairs. The national Food Processing Human Resources Sector Council industry recently announced National Occupational Classification standards for Food Process Operator in the Food industry. Locally the Alliance of Ontario Food Processors and Conestoga College's new Centre for Excellence in Food Processing have been marketing local programming and the college is now taking registrations for Fall 2011 courses.

A Plastics Advisory Committee was established in Dufferin County late 2010. Facilitated by the Workforce Planning Board, this group will work with economic development and the Georgian College campus to identify possible joint training opportunities among the local plastics industry cluster. This group will also provide local input to a broader Plastics training development project in Ontario which is being led by our colleagues at the Workforce Planning Board of Grand Erie.

New Industries for 2011

Finance: Securities – NAICS 523/Insurance Carriers – NAICS 524

Securities, commodity contracts and other financial investment and related activities (NAICS 523) comprises establishments primarily engaged in putting capital at risk in the process of underwriting securities issues or in making markets for securities and commodities; acting as intermediaries between buyers and sellers of securities; providing securities and commodity exchange services (furnishing space, marketplaces, and often facilities for the purpose of facilitating the buying and selling of stocks, stock options, bonds or commodity contracts); facilitating the marketing of financial contracts; asset management (managing portfolios of securities); and providing investment advice, trust, fiduciary, custody and other investment services.

Insurance Carriers and related activities (NAICS 524) comprises establishments primarily engaged in underwriting annuities and insurance policies, reinsurance, and the retailing of insurance and the provision of related services to policy holders. Industries are defined in terms of the type of risk being insured against, such as death, loss of employment due to age or disability, and property damage. Establishments that pool risk invest premiums to build up a portfolio of financial assets to be used against future claims. Contributions and premiums are set on the basis of actuarial calculations of probable payouts based on risk factors from experience tables and expected investment returns on reserves.

Number of Businesses

The number of Securities, commodity contracts and other financial investment and related activities (NAICS 523) businesses rose from 1,991 to 2,049 between June 2009 and December 2010. 104 of these businesses are located in Dufferin County, 604 in Wellington County and 1,341 in Waterloo Region.

During the same time period, the number of Insurance Carriers and related activities (NAICS 524) businesses rose from 395 to 404 between June 2009 and December 2010. 32 of these business are located in Dufferin County, 102 in Wellington County and 270 in Waterloo Region.

Table 34 **NAICS 523/NAICS 524 Securities/Insurance Carriers**

County	# Businesses June 2009	# Businesses June 2010	# Businesses December 2010
NAICS	523/524	523/524	523/524
Waterloo	1,308/266	1,347/261	1,341/270
Wellington	591/98	562/95	604/102
Dufferin	92/31	115/30	104/32
Total	**1991/395**	**2024/386**	**2049/404**

Table 35 NAICS 523/NAICS 524 Securities/Insurance Carriers - SME Employment (under 100 employees)

County	# Employed June 2009	# Employed June 2010
NAICS	523/524	523/524
Waterloo	2,063/2,073	2,096/2,122
Wellington	881/639	812/569
Dufferin	96/137	122/128
Total	**3,040/2,849**	**3,030/2,819**

Unlike most other industries, Statistics Canada's Monthly Labour Force Survey results indicate growth among larger employers across the entire Finance sector. For example the total number employed in the KCMA grew from 19,000 in June 2009 to 20,000 in June 2010 and by October 2010 employment sat at 24,000.

According to Statistics Canada, 2006 Census:

- There were 2,285 local jobs in Securities, commodity contracts and other financial investment and related activities while there were 2,440 local residents who worked in the industry. This indicates that of all the people commuting in and out of the area for work, there was a net difference of people leaving the three (3) counties for work. This is likely due to the proximity of employment opportunities in the Greater Toronto Area.
- In Insurance Carriers and related activities, there were 11,590 local jobs and 11,120 local residents who worked in the industry. This indicates that of all the people commuting in and out of the area for work, there was a net difference of people entering the three (3) counties for work.
- The top five (5) occupations employed 1,050 or approximately 46% of all people employed in the Securities, commodity contracts and other financial investment and related activities industry. The chart below describes the top five occupations within the industry across the WPB area by total number employed in each county.

Table 36 Top 5 Occupations NAICS 523 Securities, commodity contracts and other financial investment and related activities

NOC	Occupation	Dufferin	Waterloo	Wellington
1114	Other financial officers	55	870	250
1411	General office clerks	245	4,075	1,650
1113	Securities agents, investment dealers and brokers	10	190	50
1112	Financial and investment analysts	50	635	155
0122	Banking, credit and other investment managers	30	660	270

- The top five (5) occupations employed 4,980 or approximately 43% of all people employed in the Insurance Carriers and related activities industry. The chart below describes the top five (5) occupations within the industry across the WPB area by total number employed in each county.

Table 37 Top 5 Occupations NAICS 524 Insurance Carriers and related activities

NOC	Occupation	Dufferin	Waterloo	Wellington
6231	Insurance agents and brokers	95	1,245	275
1434	Banking, insurance and other financial clerks	25	1,240	205
1233	Insurance adjusters and claims examiners	40	855	80
1234	Insurance underwriters	10	635	190
2171	Information systems analysts and consultants	50	2,115	480

Industry Strengths

This area has long standing roots in the finance and insurance sector. Many large companies have been stable employers for many years. Unlike most other industries, where we are seeing the vast majority of growth in SME's, we are also seeing employment growth here among larger businesses. Coming out of the recession, Canada's finance sector is strong and well recognized in the world as being far less unstable than those in other countries. In the property and casualty insurance sub sector alone, it is estimated that almost 42,000 are working in Ontario.

Industry Challenges

Stable employment can also create challenges. Lack of staff turnover is not bringing enough new blood into the industry and could lead to succession planning issues over the next several years as long tenured staff start to retire. Most people entering the industry do so primarily because they have grown up knowing someone in the industry rather than through career exploration. The average age in the industry is high and long term job stability increases the ability to be able to retire early. This is causing concerns regarding the loss of skilled professionals. Training can be lengthy, in some cases up to three (3) years or more.

Availability of Labour

Most employers reported the availability of labour as good or fair.

Training Need

Standard training programs have long been available at Mohawk and Fanshawe Colleges. With the addition of more recent programming at Conestoga and Seneca, the industry could see more than 100 new recruits annually from this stream.

Transferable Skills

Numeracy, computer skills, presentation and written and verbal communication skills were identified. Specific skills mentioned include accounting, sales, construction or finance background and investigative techniques.

Occupational Risks/Opportunities

Employment in the industry is generally life-long with growth potential and access to training in a variety of specialties. Most employees will exit due to retirement. Retirements will open up opportunities to those with an interest in the industry.

Employer Recommendations

- Development of older worker retention strategies
- Better marketing of the industry to potential new workers
- Targeting students at a young age re the diversity of employment opportunities

Truck Transportation – NAICS 484

Truck Transportation (NAICS 484) comprises establishments primarily engaged in the truck transportation of goods. These establishments may carry general freight or specialized freight. Specialized freight comprises goods that, because of size, weight, shape or other inherent characteristics, require specialized equipment for transportation. Establishments may operate locally, that is within a metropolitan area and its hinterland, or over long distances, that is between metropolitan areas.

Number of Businesses

The number of Truck Transportation (NAICS 484) businesses declined from 1,820 to 1,751 between June 2009 and December 2010. The bulk of these losses occurred between June 2009 and June 2010. 184 of these businesses are located in Dufferin County, 412 in Wellington County and 1,155 in Waterloo Region.

Table 38 **NAICS 484 Truck Transportation**

County	# Employers June 2009	# Employers June 2010	# Employers December 2010
Waterloo	1,185	1,177	1,155
Wellington	441	375	412
Dufferin	194	200	184
Total	**1820**	**1752**	**1751**

Table 39 **NAICS 484 Truck Transportation - SME Employment (under 100 employees)**

County	# Employed June 2009	# Employed June 2010
Waterloo	4,033	3,710
Wellington	1,442	1,158
Dufferin	407	361
Total	**5,882**	**5,229**

According to Statistics Canada, 2006 Census, there were 6,260 local jobs in Truck Transportation while there were 8,000 local residents who worked in the industry. This indicates that of all the people commuting in and out of the area for work, there was a net difference of 1,740 people leaving the three (3) counties for work.

In 2006, the top five (5) occupations employed 4,530 or approximately 72% of all people employed in the Truck Transportation industry. The chart below describes the top five occupations within the industry across the WPB area by total number employed in each county.

Table 40 **Top 5 Occupations NAICS 484 Truck Transportation**

NOC	Occupation	Dufferin	Waterloo	Wellington
7411	Truck drivers	215	4,210	1,605
1475	Dispatchers and radio operators	20	635	245
7452	Material handlers	190	4,075	1,205
7321	Automotive service technicians, truck and bus mechanics and mechanical repairers	330	2,505	985
1411	General office clerks	245	4,075	1,650

Industry Strengths

The industry is ranked #11 among SME employment and provides lots of opportunities for self employment to grow into offering employment to others. Our geographic location makes this a key area for truck transportation. Unlike other industries the impact of technology on this industry is currently minimal. Employment turnover among non-driving jobs is relatively low.

Industry Challenges

Many large employers are indicating the need for extensive experience. Although demand remains very high, the supply of qualified drivers has declined over the past couple of years. Many new drivers are likely required to be away from home for extended periods of time. There appears to be a lack of understanding as to realistic on the job requirements prior to entering training and/or employment. New legislative requirements in the United States will impact cross border shipping and since it raises driver requirements to meet specific criteria before entry, could compound the driver shortage even further.

Availability of Labour

Many employers indicated that the supply of adequately trained drivers was fair to poor. Apprenticeship and mentor programs in some larger companies are enabling them to hire and then upgrade training however most still expected that the majority of new hires would have to have 2-5 years of experience.

Training Need

There is a huge variation in the types of training offered through accredited trainers as well as their ability to support successful placement into employment. Often pre-screening of applicants to determine that they are a good fit for driving is not done. This can result in newly trained drivers being unable to find employment that realistically best suits them. For example expectation of local runs which are generally given to longer tenured employees; bad driver abstracts stopping them from being able to cross the border, etc.

Transferable Skills

In non-driving occupations such as HR and Finance, workers could bring skills from other industries however no other definitive skills were identified specifically for drivers. A realistic view of truck driving would be more appropriate in most cases.

Occupational Risks/Opportunities

There will be lots of opportunities for drivers now and in the foreseeable future. Those wishing to enter the industry and those directing potential drivers to training must take adequate care to ensure that the training being offered will be recognized by local employers and that the candidate has the right personality traits to fit as a driver.

Employer Recommendations

- Industry needs to work on image to attract more suitable new entrants
- Development of flexible upgrading to partially trained drivers who have already completed a training program
- Greater enforcement of training standards in driving
- Incentives to provide mentorship to create employment opportunities
- Provide student access to practical/actual experience in the cab

Strategic Priorities and Action Plans

Five Strategic Priorities have been identified and validated. They are:

- Alignment of existing training/education programs to match shifting skill requirements
- Marketing of existing employment opportunities to new workers and workers in transition
- Rising Skill Demands/Shift in Key Employment Sector
- Older Worker Retention
- Engaging Underutilized Talent Pools – Incorporating under represented populations into the workforce

Strategic Priority #1
Alignment of existing training/education programs to match shifting skill requirements

Actions Since Last Report:

- One-day Agriculture Training and Education planning forum to discuss the changing education/training needs of the industry and identify strategies to address these needs locally and collaboratively
- Development of Dufferin Training Program Advisory Committee – Plastics

Action 1

One day food industry conference to highlight how innovation across the entire continuum is impacting employment

Lead	Confirmed Partners	Timelines	Expected Results
Workforce Planning Board	University of Guelph Conestoga College Ontario Institute of Agrologists OMAFRA Agricultural Management Institute	May 2011	100 industry and community participants will learn about shifting employment opportunities

Action 2

Research: Employment needs analysis for Professional, scientific and technical/creative class workers in Wellington and Dufferin

Lead	Potential Partners	Timelines	Expected Results
Workforce Planning Board	Municipal Economic Development offices in Orangeville, Shelburne, Guelph	May 2011 - August 2011	Research reports documenting a large scale analysis of the employment needs of the industry, synthesis of results and recommendations for local actions

Action 3

Development of advanced standing training upgrade program for unemployed truck drivers

Lead	Potential Partners	Timelines	Expected Results
Workforce Planning Board (facilitator)	Local trainers Local employers Service providers	August 2011 - March 2012	A short term training upgrade program will be developed Local employers will approve minimum criteria and acknowledge training as a pre-cursor to possible employment

Action 4

Development/reinstatement of part-time, flexible programming to upgrade workers to:

- Mechanical Technician and Technologist
- Machine Operator and CNC Machinist - Action carried forward from 2010 report

Potential Lead	Potential Partners	Timelines	Expected Results
Conestoga College	Chambers of Commerce Local employers	September 2011	Current employees will have access to part-time, flexible programming to allow for upgrading while still employed No action to date

Strategic Priority #2

Marketing of existing employment opportunities to new workers and workers in transition

Actions Since Last Report:

- Farm to Fork employment and career/job fair events held in Kitchener and Guelph
- Zoom Health Care Career Days

Action 1

Promotion of Manufacturing Industry to local youth

Co-Lead	Potential Partners	Timelines	Expected Results
Manufacturing Innovation Network Workforce Planning Board	MIN employers Local school boards	August 2011 - October 2011	2 video vignettes will be developed to highlight local manufacturing opportunities to youth via social media outlets

Action 2

Working in Rural Wellington Career Event

Lead	Potential Partners	Timelines	Expected Results
Workforce Planning Board	Town of Minto Township of Mapleton Township of North Wellington	October 2011	150 people will attend to learn about existing rural employment opportunities

Action 3

Outreach to students/transitioning workers re Finance/Insurance industry careers

Lead	Potential Partners	Timelines	Expected Results
Insurance Institute of Canada	Workforce Planning Board Career Education Council of Guelph Wellington Business and Education Partnership of Waterloo Region	October 2011 - March 2012	A local awareness event will be held for students and transitioning workers

Action 4

Labour Market Information (LMI) Workshops

Lead	Confirmed Partners	Timelines	Expected Results
Workforce Planning Board	Employment service providers Social Services	May 2011 - December 2011	A series of LMI workshops will be developed and delivered to Employment Ontario and Ontario Works front line staff

Action 5

Networking events for Engineers in Dufferin/N. Wellington

- Carried forward from 2010 report

Co-Lead	Potential Partners	Timelines	Expected Results
Town of Orangeville Workforce Planning Board	Local employers Skillsinternational.ca	April 2011 - November 2011	Two networking events will be held

Strategic Priority #3
Rising Skill Demands/Shift in Key Employment Sectors

Actions Since Last Report:

- Research report – Enhancing Pathways: The Literacy and Language Continuum – Phase 1 completed – Project Read Literacy Network
- Research: Industry employment needs analysis for Professional, Scientific and Technical/Creative Class workers in Waterloo Region – Pilot project completed

Action 1

Development of a Creative Talent Strategy for Waterloo Region

Lead	Confirmed Partners	Timelines	Expected Results
City of Waterloo Canada's Technology Triangle Inc.	Workforce Planning Board Waterloo Region Economic Development offices Post secondary institutions Communitech Creative Enterprise Enabling Organization Local employers	March 2011 - December 2011	A talent strategy will be developed and actions identified

Action 2

Transitioning in New Times

Lead	Confirmed Partners	Timelines	Expected Results
Lutherwood	Workforce Planning Board ComDev Sun Life, Faith Life, Open Text; and other local employers Conestoga College Waterloo Region Labour Council Communitech	June 2010 - June 2012	Training programs will be developed to support youth, older workers and new Canadians upgrade to minimum industry requirements

Action 3

Research: Skill Demands, Diversification and Shifting Employment in Wellington County

Lead	Confirmed Partners	Timelines	Expected Results
Workforce Planning Board	City of Guelph – Economic Development Wellington County Municipal Economic Development Group	March 2011 - January 2012	Research report documenting a large scale analysis of the employment needs of the industry, synthesis of results and recommendations for local actions

Strategic Priority #4
Older Worker Retention

Action 1

Research/literature review of current older worker retention strategies in the finance industry

Lead	Potential Partners	Timelines	Expected Results
Workforce Planning Board	Insurance Institute of Canada Local employers	April 2011 - October 2011	A report on current or proposed strategies within the industry will be shared with local employers

Strategic Priority #5
Engaging Underutilized Talent Pools – Incorporating under represented populations into the workforce

Actions since last report

- Youth unemployment research underway to be completed June 2011
- Development of Making Cents of Abilities Coalition 3 year Strategic Plan
- Global Skills Conference held March 2011 – immigrant employment
- Discussions underway to determine how to integrate WRIEN programming into new Local Immigration Partnership Council (LIPC) structure

Action 1

Meeting to discuss potential for a local Job Developer Network

Lead	Potential Partners	Timelines	Expected Results
Workforce Planning Board (facilitator)	Employment service providers Job developers	June 2011 - September 2011	A planning meeting will be held for job developers to determine the potential for the establishment of, and support for, a local Job Developer Network/Website

Action 2

Meeting to identify strategies to engage/re-engage youth into the workforce

Lead	Potential Partners	Timelines	Expected Results
TBD Workforce Planning Board (facilitator)	Making Cents of Abilities Coalition Employment service providers WRIEN Local employers	June 2011	3 engagement/ re-engagement strategies will be identified to the community for action development and implementation From research currently underway

Appendices

Appendix 1 – Labour Market Indicators

Statistical Labour Market Data comes from Canadian Business Patterns, Taxfiler and Census data and the indicators used are the following:

Total employment and sector employment

Employment in SMEs

Total number of employers

Industrial structure of employers

Population dynamics

Migration

Occupational Data

Education

Appendix 2 - References

Economic Development Strategies

Town of Orangeville Economic Development Strategy, Final Report, November 2007.
Key focus areas include: Manufacturing, Professional, scientific and technical and Tourism and the Creative Industries.

Designing the Future: An Economic Development Strategy for the City of Cambridge, December 2008.
Key industries identified include: Advanced manufacturing, Life sciences, Small knowledge-based industries and the Environment.

Building New Bridges: The City of Waterloo 10-Year Economic Development Strategy 2008-2017, December 2008.
Key industries are: Technology industries, Finance and Insurance, Manufacturing and Education.

City of Kitchener's 2007-2010 Economic Development Strategy, June 2007.
One of six areas of focus is "Supporting manufacturing competitiveness". The report cites that "the City is developing cluster strategies". Sectors cited are: Education and knowledge creation, Health sciences and Digital Media.

City of Guelph - Prosperity 2020: Phase 1: Economic Base Analysis Report, Oct. 2009.
Key sectors identified include: Advanced Manufacturing, Agri-Food and Innovation; and Environmental Technologies.

The Town of Minto's Business Retention and Expansion Report does not specifically identify key industries however the economic development office will be looking at Agriculture, Manufacturing and Retail.

Other references:

AON Consulting – Pay Increase Survey.
AON Consulting, August 2010

Monthly Labour Force Survey.
Workforce Planning Board of Waterloo Wellington Dufferin, January 2011

Ontario Labour Market Report.
LMI & Research Dept, Ministry of Training, Colleges and Universities, November 2010

Ontario Labour Market Report.
LMI & Research Dept, Ministry of Training, Colleges and Universities, November 2009

Creative Class Workers in Waterloo Region.
Workforce Planning Board of Waterloo Wellington Dufferin, September 2010

Metropolitan Monthly Monitors.
The Conference Board of Canada, Oct. 2010

Facts of the General Insurance Industry in Canada. Insurance Bureau of Canada, 2009

Appendix 3 – Consultation Participants

The following organizations participated in various consultation sessions held in:
Ayr/Cambridge – February 25 /March 10, 2011
Orangeville – February 15, 2011
Guelph – February 28, March 8, 2011

2nd Chance Career Counseling

Agricorp

Beyond Rewards

Canadian Mental Health Association

Canadian National Institute for the Blind

Centre Wellington Chamber of Commerce

City of Guelph

City of Cambridge

College Heights Secondary School

Conestoga College

County Wellington

Employment and Income Support Community Advisory Committee

Georgian College

Guelph Economic Development Advisory Committee

Guelph Wellington Business Enterprise Centre

Kelly Services

Literacy Group of Waterloo Region

Lutherwood

Ministry of Training Colleges and Universities

Northern Lights

Project Read Literacy Network

Regional Municipality of Waterloo

Skillsinternational.ca

The Working Centre

Torchlight Industries

Town of Minto

Upper Grand District School Board

University of Guelph

Waterloo Region Immigrant Employment Network

Appendix 4 – Key Industry Informants

Ontario Mutual Insurance Association

The Insurance Institute of Canada

McKinnon Transport

Orangeville Insurance Services

Tri County Truck Driver Training

The Erb Group of Companies

The Co-operators

Sun Life Financial

Liberty Linehaul Inc.

Global Currency Services Inc.

Dufferin Mutual Insurance Company

Cowan Insurance Group

Scheider National

Cowan Insurance Group

Your Advantage Staffing

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This Employment Ontario
Project is funded by the
Government of Ontario.

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