

Fall 2016/Winter 2017

LABOUR MARKET PLANNING REPORT



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Local Labour Market Planning REPORT

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Mission:

To work collaboratively with community partners on the creation of innovative labour market solutions that meet local workforce development needs.



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BACKGROUND/CONTEXT

The Labour Market Group of Renfrew & Lanark

In the Province of Ontario, there are 26 Workforce Planning Boards, which receive funding from the Ministry of Advanced Education and Skills Development (MAESD). The Boards facilitate the Local Labour Market Planning (LLMP) process that identifies and prioritizes labour market issues. Once issues are identified, the Workforce Planning Board or other local organizations responsible for this task, work with community partners to develop a plan of action to meet the changing labour market needs of the community.

In place of a local Planning Board, the Labour Market Group of Renfrew & Lanark (LMG) has delivered the LLMP process within the Renfrew-Lanark region since May 2007. The LMG works with two sub-committees, one for Renfrew and one for Lanark, which reflect a wide cross-section of industry, employment, training, economic development and governmental agencies. The committees provide local labour market information (LMI) and feedback on community projects so that we can better serve our communities within the region. The Labour Market Group is a proud member of Workforce Planning Ontario.

www.workforceplanningontario.com

EXECUTIVE SUMMARY

Located in Eastern Ontario and bordering on the National Capital Region, Renfrew and Lanark Counties combined, cover an area of 10,679 km² with a total projected population of 172,318. Historically, both counties have had similar economies that were very strong in manufacturing, agriculture and forestry, resulting in higher rates of attainment for apprenticeship, trades, and college diplomas. Statistical findings and local intelligence indicate that in recent years, there has been a broad shift in local industries from manufacturing to retail, healthcare and public administration. Local intelligence suggests that the forestry, tourism, agriculture and manufacturers within the region have indicated they are experiencing improved business conditions thanks to the lower Canadian dollar and lower fuel prices.

From September 2015 through to January 2016, the LMG engaged with local employers throughout the region conducting the Employer One Survey. The survey serves as a vehicle for the employer community to express their needs on a range of Human Resources issues, such as labour turnover, hard to fill positions, recruitment difficulties, current and future skills shortages, as well as issues in training and education practices. The goal of the survey is to gather current local labour market information that can be then shared throughout our regional network. 85 employers completed the survey from every range of industry within Renfrew and Lanark Counties. The information and data collected from the Employer One survey is reflected throughout this report in the form of “local intelligence”. To obtain a detailed copy of the Employer One Survey Results or to participate



EXECUTIVE SUMMARY

Continued...

in this year's survey, please visit www.renfrewlanark.com. The results from the 2016-2017 Employer One survey will be made available in March 2017 at www.renfrewlanark.com.

For the fourth year in a row, the LLMP contains a section profiling data captured from within the regional Employment Ontario network as provided by the Ministry of Advanced Education and Skills Development (page 21). In particular, this information may be of interest to any organization actively working in employment, literacy and economic development services.

To provide consistent access to the most current local labour market information, the LMG regularly updates its website. The site includes monthly employment and unemployment rates, unique labour market information, employment, and training-related news, as well as downloadable editions of our published reports.

www.renfrewlanark.com

In 2015-2016, the LMG has delivered several customized LMI presentations and packages to a variety of community partners including, economic development agencies, school boards, community planning committees, Employment Ontario service providers, youth programs, older worker programs, Colleges, municipal councils, and the Pikwàkanagàn First Nation. For more information or to schedule a presentation, please contact us at renfrewlanark@gmail.com.

Significant Changes

Within the region, there are currently 44,022 jobs in Renfrew County and 21,332 jobs in Lanark County. The local economy's projected job growth from 2014 to 2015 was at 0.8% for Renfrew County and -1.5% for Lanark County. Despite the low growth rate for Renfrew County and a slight loss in jobs for Lanark County, it is projected that there will be job growth in both counties through 2021.

2016 Canadian Census Update

The collection of data for the 2016 Canadian census is now complete. The overall collection response rate of 98.4 percent for the 2016 Census of Population is higher than for each of the 2011 and 2006 Census programs. The population and dwelling counts will be published on the Statistics Canada website on February 8, 2017. The LMG will begin sharing this data as soon as it becomes available.



The LMG wishes to thank Algonquin College, employers, employees, service providers, educators and others for their input into this year's Labour Market Planning Report. We look forward to their continued involvement and encourage participation from new organizations and individuals. The Labour Market Group is committed to generating positive change within the local labour market by working collaboratively with community partners.

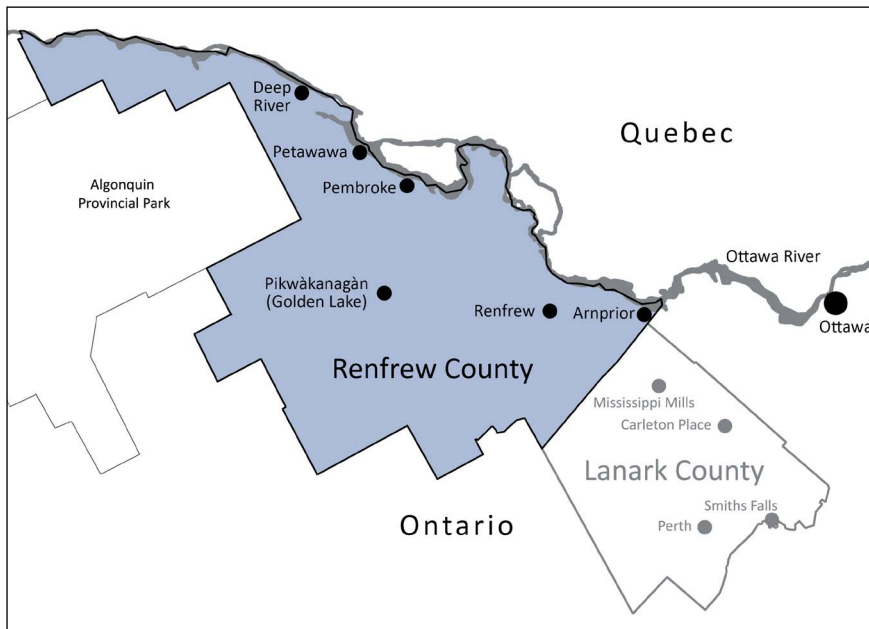
Sincerely,

A handwritten signature in black ink, appearing to read 'Matt LeMay'.

Matt LeMay, Coordinator
The Labour Market Group of Renfrew & Lanark

DEMOGRAPHIC OVERVIEW

RENFREW COUNTY

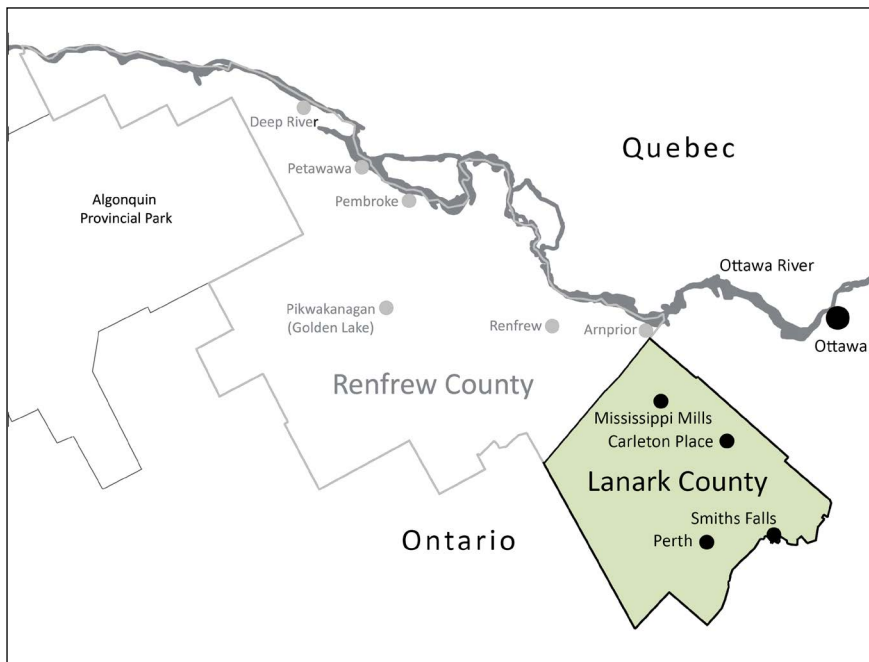


Renfrew County Census Division

Demographic Profile

According to EMSI Analyst, Renfrew County has a total projected population of 104,382. The county is geographically the largest in Ontario, encompassing approximately 7,645 square kilometres. Located in the heart of the Ottawa Valley, it stretches along the shores of the Ottawa River from the outskirts of Ottawa in the east to the northern tip of Algonquin Park's wilderness in the west. Renfrew County is home to over 900 pristine lakes and four major river systems. The county is highly diverse, ranging from wilderness areas, which make up half the county, to highly industrialized and developed areas with world-class employers and facilities using the latest technology. The natural environment is unique, and rural in nature, lending itself to a wide range of outdoor and tourism activities. There is a total of 18 municipalities in Renfrew County.

LANARK COUNTY



Lanark County Census Division

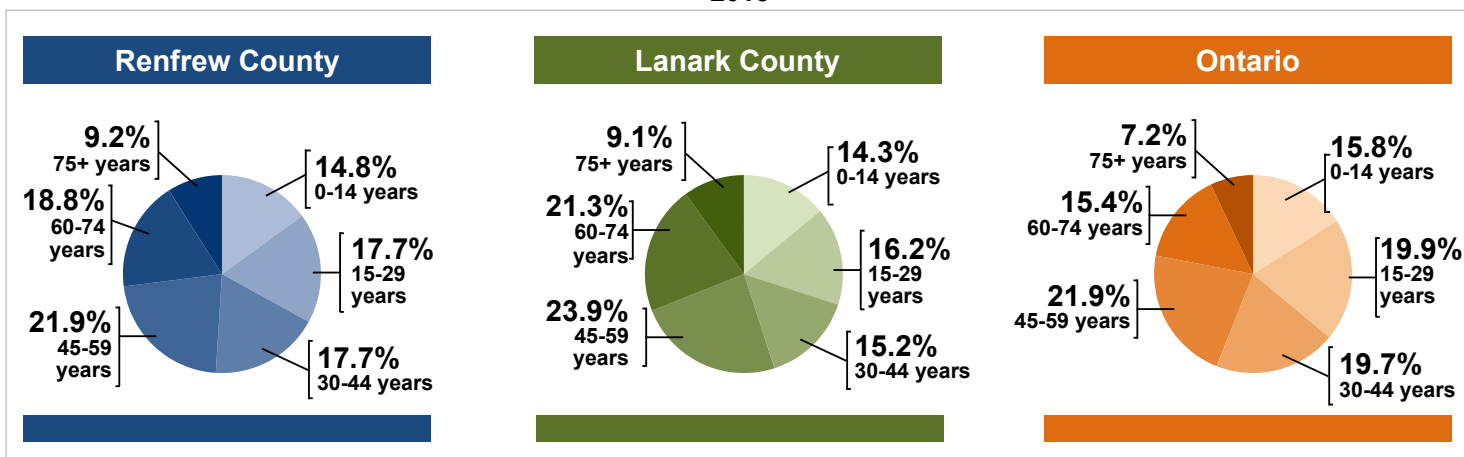
Demographic Profile

According to EMSI Analyst, Lanark County has a total projected population of 68,061. The county is a geographically large and diverse region covering an area of 3,034 square kilometres. Lanark has two large rivers, the Mississippi and Rideau, which both flow into the Ottawa River. Located on the western boundary of Ottawa, Lanark County is the Maple Syrup Capital of Ontario. Comprised mostly of rural areas with pockets of urban activity, Lanark County advertises "a superior quality of life." The county is said to offer "the best of both worlds," having communities surrounded by the beauty of nature while still being only minutes away from world-class amenities in the nation's capital. There is a total of nine municipalities in Lanark County.

AGE CHARACTERISTICS

The charts and accompanying analysis that follow reflect the age characteristics of Renfrew and Lanark County citizens as compared to those of Ontario.

Population Age Characteristics 2015



Source: EMSI Analyst projection, October 2016

In Renfrew County, 49.7% of the population is 45 years and older, and in Lanark County, 54.1% of the population is 45 years and older. Whereas in Ontario, only 44.3% of the population is 45 years and older. However, the opposite trend is apparent for the youth demographic, age 15-29. Lanark County has the lowest percentage of youth, 16.2%, Renfrew has a slightly higher percentage of youth, 17.7%, and Ontario has the largest percentage of youth, 19.9%.

Local Intelligence - It is predicted that Renfrew and Lanark Counties' relatively small youth populations will be unable to fulfil workforce demands of the future. As a result, employers may be required to hire older, laid-off or retired workers to meet workforce demands. Further, there are increasing numbers of older boomers and seniors (55+) seeking part-time and full-time employment. Enhanced customer service and new technology training for older workers may assist these job seekers to reintegrate into the labour market within the retail and service industry.

According to the **2015/2016 Employer One Survey Results**, 15.1% of the surveyed workforce are under age 25, while 24.4% of the surveyed workforce are over age 55. These local statistics demonstrate a clear aging workforce trend in Renfrew and Lanark Counties. With such a large portion of the population at or near retirement age, there is an increased chance of future workforce shortages. The aging demographic of the region, coupled with in-migration of individuals between the ages of 45-65, may also escalate demands on the counties' health care systems. This statistical data implies a forecasted need for more health care workers in Renfrew and Lanark Counties.

Download the 2015/2016 Survey Results
here: www.renfrewlanark.com



MEDIAN AGE

This table compares the median age change in Renfrew County, Lanark County and the province of Ontario between 2006 and 2011.

The median age of citizens in Renfrew County is 43.9, and in Lanark County, it is 46.2. Both counties median age is older than the provincial median of 40.4 years of age. Lanark County experienced the most significant change from 2006 to 2011 with an increase in the median age by 3.1 years.

Region	Median Age 2006	Median Age 2011	Difference in Years
Renfrew County	42.1	43.9	1.8
Lanark County	43.1	46.2	3.1
Ontario	39.0	40.4	1.4

Source: Statistics Canada 2006 and 2011 Census

Statistics Canada will begin releasing Census results in February 2017.

For a detailed list of the census release schedule, visit:

<http://www12.statcan.ca/census-recensement/2016/ref/release-dates-diffusion-eng.cfm>

POPULATION CHANGE

This table compares the total population change in Renfrew County, Lanark County and the province of Ontario between 2015 and 2016.

Between 2015 and 2016, Renfrew County experienced a slight population decline of 0.2%. Lanark County experienced a slight population growth of 0.1%. Both population growth rates are lower than that of the province, which is currently at 0.9%. While further research is required, the difference in growth between Renfrew & Lanark Counties and the province may be attributable to fewer immigrants settling in rural communities.

Census Division	Population 2015	Population 2016	Population Change (%)
Renfrew County 3547	104,382	104,176	-0.2%
Lanark County 3509	68,061	68,142	0.1%
Ontario	13,792,052	13,921,910	0.9%

Source: EMSI Analyst projection, October 2016

ABORIGINAL IDENTITY POPULATION

This table looks at the percentage of the Aboriginal population in the region compared to the Province of Ontario.

The Aboriginal population in Renfrew County is significantly higher than both Lanark County and the province. The Algonquins of Pikwàkanagàn First Nation community is situated on the shores of the Bonnechere River and Golden Lake in Renfrew County and largely makes up this population.

	Renfrew County	Lanark County	Ontario
Percentage of total population	7.5%	3.7%	2.4%

Source: Statistics Canada 2011 Census

ABORIGINAL ANCESTRY POPULATION

This table looks at the percentage of people with Aboriginal ancestry in the region compared to the Province of Ontario.

An additional 2% of residents in both Renfrew and Lanark Counties disclose an Aboriginal ancestry; however, these individuals do not self-identify as being members of the Aboriginal population noted above.

	Renfrew County	Lanark County	Ontario
Percentage of total population	9.5%	5.8%	3.4%

Source: Statistics Canada 2011 Census

Local Intelligence – The Algonquins of Pikwàkanagàn First Nation has partnered as principle shareholder in several renewable solar energy projects. The revenue generated from these projects will be re-invested in future joint economic development ventures that will benefit the First Nation.

A business investment strategy survey was recently completed within the community of Pikwàkanagàn with 126 persons responding. 93% of respondents indicated that creating job opportunities for community members should be the number one priority.

A labour market information session for unemployed Indigenous youth was held at the Makwa Centre in Pikwàkanagàn (October 2016). During an open forum, the youth that attended indicated that the biggest barriers to employment were the lack of job opportunities within the community and access to transportation. It was also noted that a lack of adequate funding and not fully understanding the program's expectations before enrolling were the main barriers to successfully completing post-secondary studies.

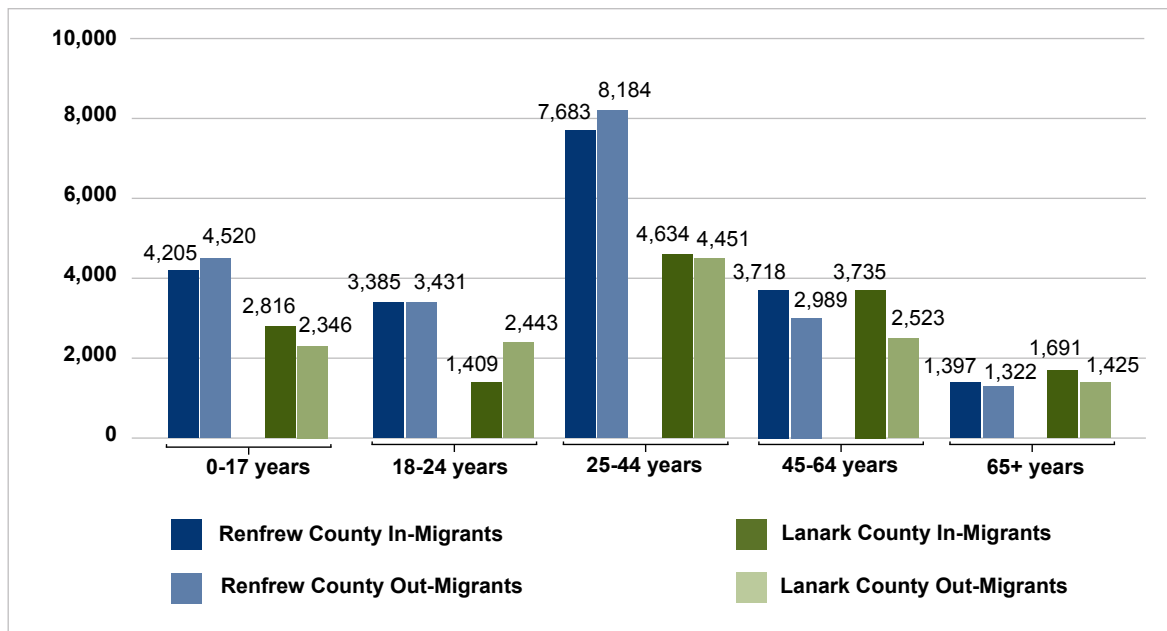


MIGRATION CHARACTERISTICS

Migration characteristics describe the movement of people from one place to another, usually across a political boundary for the purpose of establishing a new residence. Migration can be international (between countries) or interregional (within countries). One of the most significant migration trends observed in the last decade or more has been rural to urban migration—the movement of people from the countryside to cities in search of opportunities.

The following graph shows migration characteristics of Renfrew and Lanark Counties between 2009 and 2014.*

**Migration Characteristics by Age Category
2009-2014**



Source: Statistics Canada Taxfiler

Total Net-Migrants in Renfrew County from 2009-2014: -58

Total Net-Migrants in Lanark County from 2009-2014: 1,097

Both Renfrew and Lanark Counties saw significant migration in all age groups between 2009 and 2014, suggesting a healthy turnover of population. While many have left the rural areas, possibly seeking urban opportunities, significant numbers have arrived seeking a more rural lifestyle.

Renfrew County experienced an overall net out-migration of 58 residents between 2009 and 2014. The greatest net influx was among the 45-64 age group (729 in-migrants), followed by the 65+ age group (75 in-migrants). There was a net out-migration of young people in the 0-44 age groups (862 out-migrants). This out-migration of core working age persons and their families suggests the current and future supply of workers may be limited, in which case proactive retention measures should be considered.

Lanark County experienced a total net in-migration of 1,097 residents from 2009 to 2014. The greatest net influx was in the 45-64 age group (1,212 in-migrants), followed by the 0-17 age group (470 in-migrants). In Lanark County, the only net out-migration from the region was among the 18-24 age group (-1,034) and were likely attributable to youth pursuing post-secondary education opportunities outside the county. In both counties, the influx of people over the age of 45 coupled with an aging demographic suggests that the region may require an increased level of health care services and health care workers in the coming years.

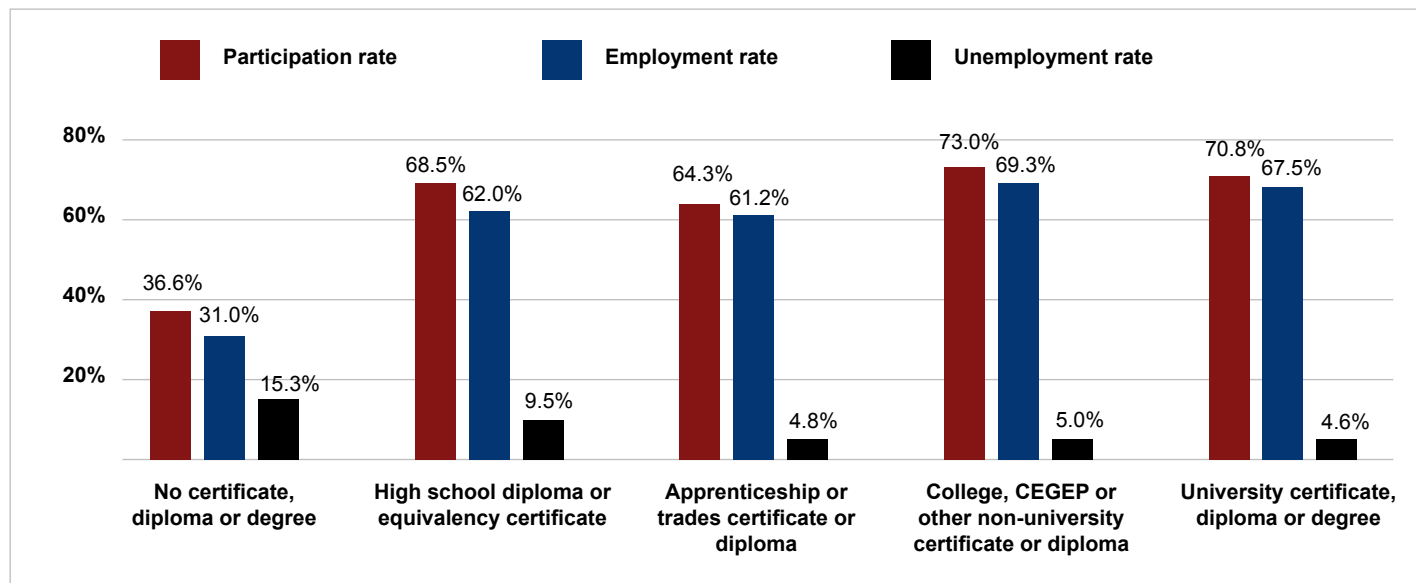
Local Intelligence - The Upper Canada District School Board Report states there is an excess of surplus classroom space due to declining enrolment; at the elementary level the decline has been 17 percent from 2005 to 2015. Similarly, secondary school enrolments over the same period declined by about 4,000 students, or 30 percent. This demonstrates the demographic shift in rural areas and the potential impact this will have on the labour market as youth populations decline.

* Migration characteristics data does not include the number of births or deaths in the region.

EDUCATIONAL ATTAINMENT AND LABOUR FORCE STATUS

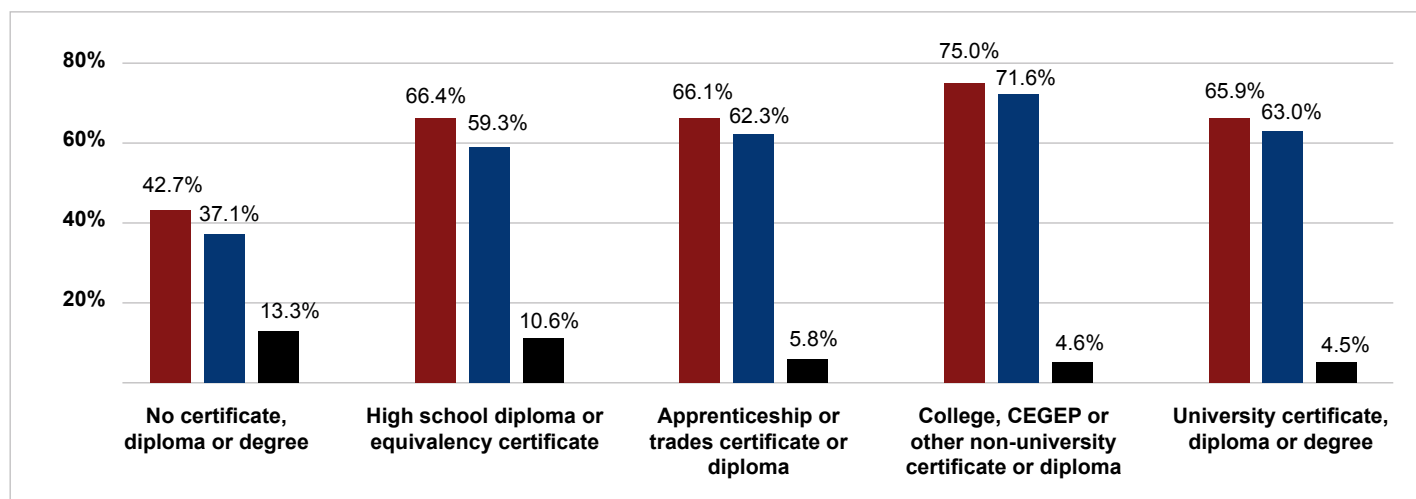
The following graphs represent the participation rate, employment rate and unemployment rate based on the highest certificate, diploma or degree obtained by the currently active population.

Labour Force Characteristics by Educational Attainment - Renfrew County



The chart above clearly illustrates that individuals living in Renfrew County that have obtained a college diploma, certificate or university degree are up to 3 times more likely to be employed than those that have not. Unemployment rates are also 5.8% lower for individuals that have completed high school than those that have not.

Labour Force Characteristics by Educational Attainment - Lanark County



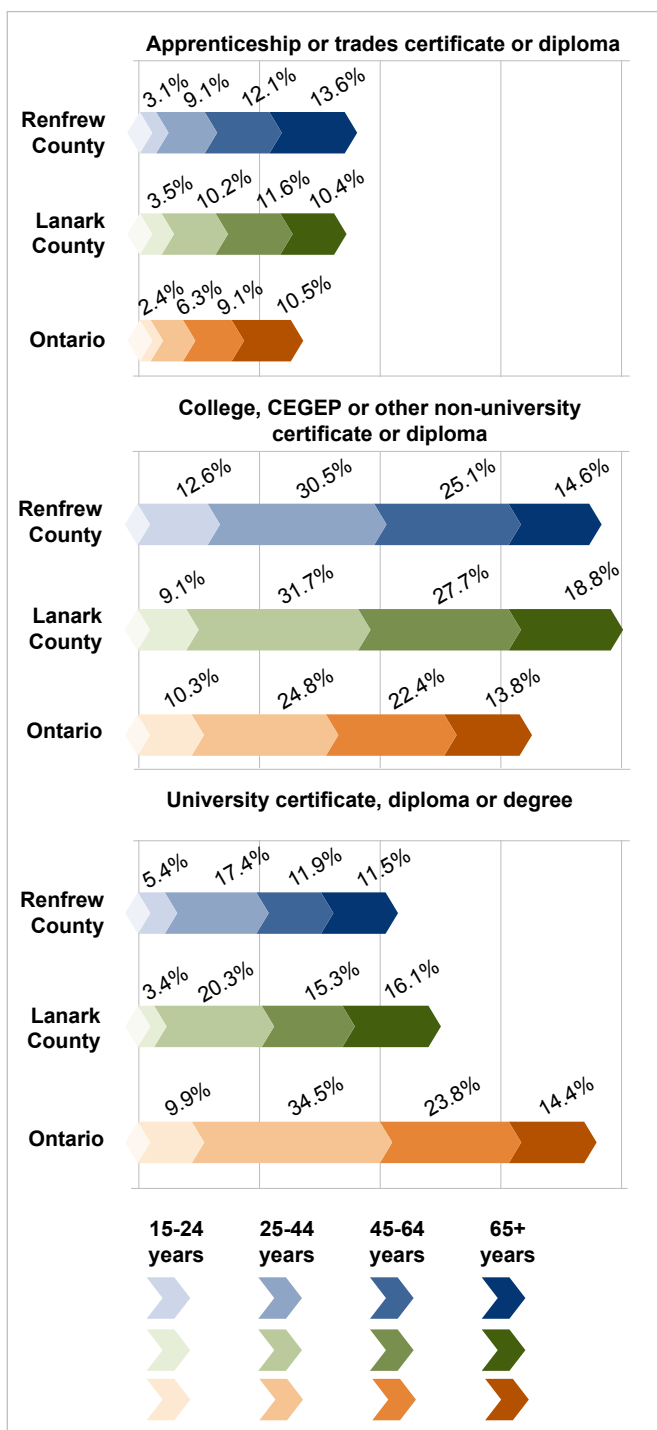
Source: 2011 National Household Survey

The chart above illustrates that individuals living in Lanark County that have obtained a college diploma, certificate or university degree are up to 3 times more likely to be employed than those that have not. Unemployment rates are also 2.7% lower for individuals that have completed high school diplomas than those that have not.

LOCAL EDUCATIONAL ATTAINMENT SUMMARY

The chart below shows the level of education attained by different age groups in Renfrew and Lanark Counties in comparison to the Province of Ontario.

Educational Attainment by Age Cohort



Source: Statistics Canada, 2011 Census

Since 2006, Renfrew and Lanark Counties have seen some positive increases in their level of educational attainment. According to the 2011 National Household Survey, over 42% of those aged 15-24 in Renfrew County, and over 40% in Lanark County, have completed a high school certificate or equivalent, compared to approximately 36% and 32% respectively in 2006. Renfrew and Lanark Counties have historically had strong economic bases comprised of the manufacturing, agriculture and forestry sectors. This resulted in higher rates of attainment of apprenticeships, trades and college certificates, and lower rates of university degrees in nearly every age group in comparison to the province. While Renfrew County has seen some increases in the level of attainment of College and University level education, Lanark County has seen marginal decreases. However, the region still falls well behind provincial attainment levels in both categories across most age cohorts. Finally, Renfrew and Lanark Counties continue to exceed provincial attainment levels in all age cohorts for individuals who have completed an Apprenticeship or Trades Certificate or Diploma.

Local Intelligence – Algonquin College's Waterfront Campus in Pembroke achieved a record enrolment in the fall of 2016 with more than 950 full-time students studying in the 19 full-time programs offered at the campus. The campus has several new programs under development as it continues to respond to the labour market needs of Renfrew County and sector specific industries throughout Canada. Three new full-time programs, planned to launch in fall 2017, are Urban Forestry-Arbiculture, Action Sports and Park Development and Applied Nuclear Operations and Radiation Safety.

Nursing continues to be the highest enrolment program at the Pembroke Campus with more than 180 students registered in the four-year Bachelor of Science in Nursing Degree.

Willis College has campuses in Arnprior, Smiths Falls and Ottawa. They are one of the oldest career colleges in the area providing fast-track diplomas and certificates in employer-driven skills training for in-demand jobs in the fields of business, health and technology. Most of the diploma programs come with a guaranteed co-op placement which provides real-life work experience for the students. In Fall 2016, Willis College, in partnership with The Congress of Aboriginal Peoples, launched a pilot diploma program. It is an Indigenous Community Service Worker (ICSW) Diploma Program what provides a high demand training program to Indigenous people. In 2017, Willis College will launch an Open Source Database Advanced Diploma program aimed at filling an existing skills gap within the IT industry.

The Labour Market Group continues to provide valuable insight into future career opportunities for youth in various settings. Among other information, students are provided with an overview of the region's economy, average earnings based on education level, and the impacts of an aging workforce. The Labour Market Group encourages students to research their career interests and the industry outlooks to ensure they are investing in a bright future.

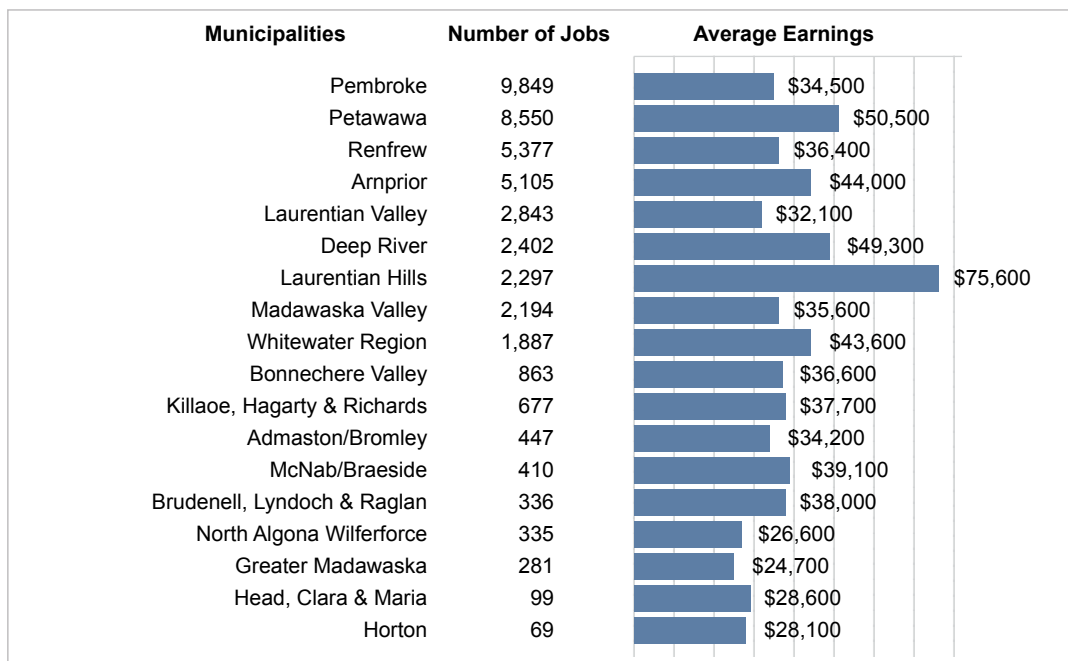
ECONOMIC OVERVIEW

In a bid to provide current and accurate labour market information, the LMG has begun using the Economic Modeling Specialists International (EMSI) Analyst tool to mine very valuable economic and occupational data. The EMSI Analyst tool combines employment data, payroll data with data from the Labour Force Survey (LFS), Census and Canadian Business Patterns (CBP) to form detailed geographic estimates of employment.

EMPLOYMENT BY MUNICIPALITY

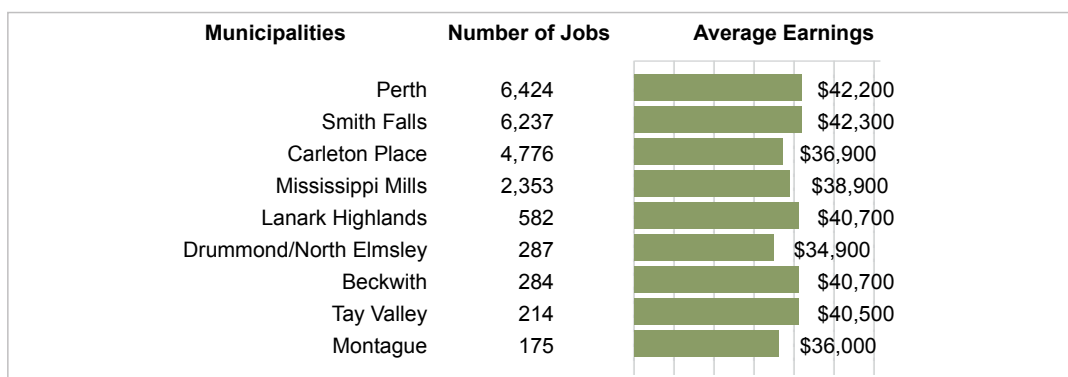
The following two graphs represent the number of jobs per municipality in Renfrew and Lanark Counties, as well as the average earnings.

Employment by Municipality - Renfrew County 2015



Source: EMSI Analyst projection, October 2016

Employment by Municipality - Lanark County 2015



Source: EMSI Analyst projection, October 2016

While the average earnings across Lanark County's municipalities are fairly consistent, the average earnings across Renfrew County's municipalities show a greater variance. These difference in Renfrew County are based on the presence of local industries. Garrison Petawawa is located in the Town of Petawawa, and Canadian Nuclear Laboratories and Bubble Technologies are located in Deep River and Laurentian Hills. These employers have given a significant boost to the average earnings in these regions.

HIGHEST PAYING INDUSTRIES - RENFREW COUNTY

NAICS	Industry	Average Earnings 2015
22	Utilities	\$81,053
54	Professional, scientific and technical services	\$76,138
55	Management of companies and enterprises	\$62,314
91	Public administration	\$55,617
31-33	Manufacturing	\$52,443
61	Educational services	\$45,764
41	Wholesale trade	\$45,655
23	Construction	\$44,168
62	Health care and social assistance	\$37,233
52	Finance and Insurance	\$36,212

Source: EMSI Analyst projection, October 2016

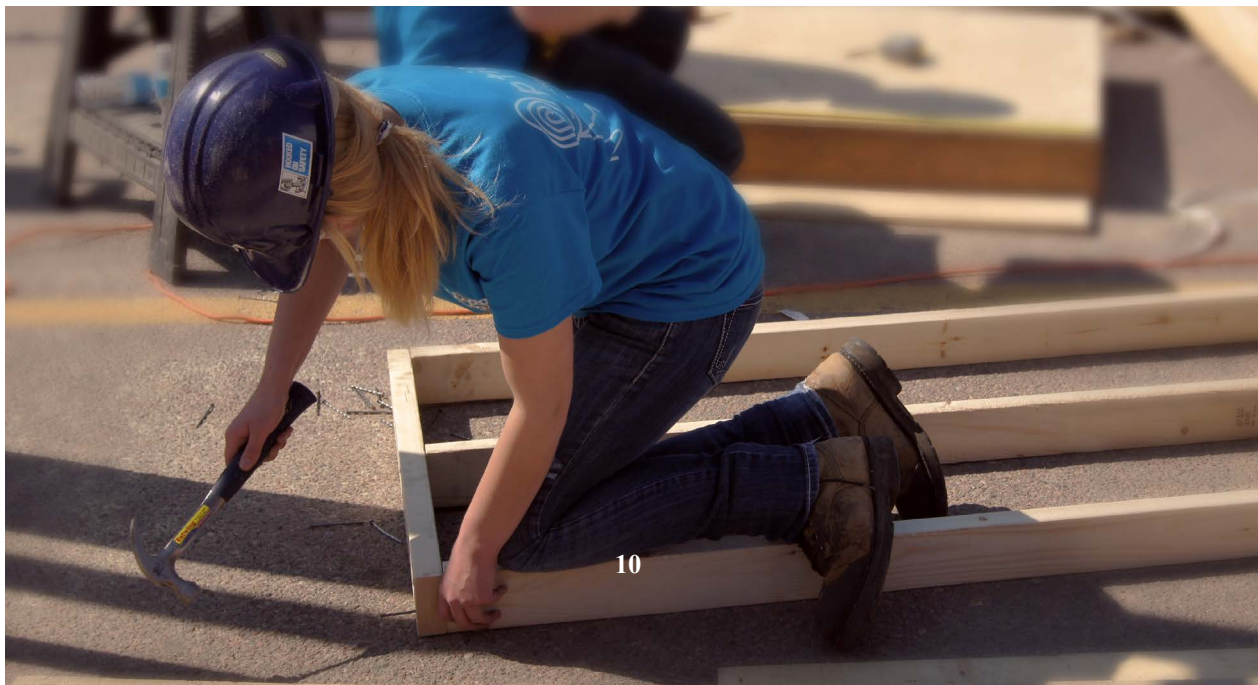
The industries in Renfrew County with the greatest average earnings in 2015 were utilities, professional, scientific and technical services, and management of companies and enterprises.

HIGHEST PAYING INDUSTRIES - LANARK COUNTY

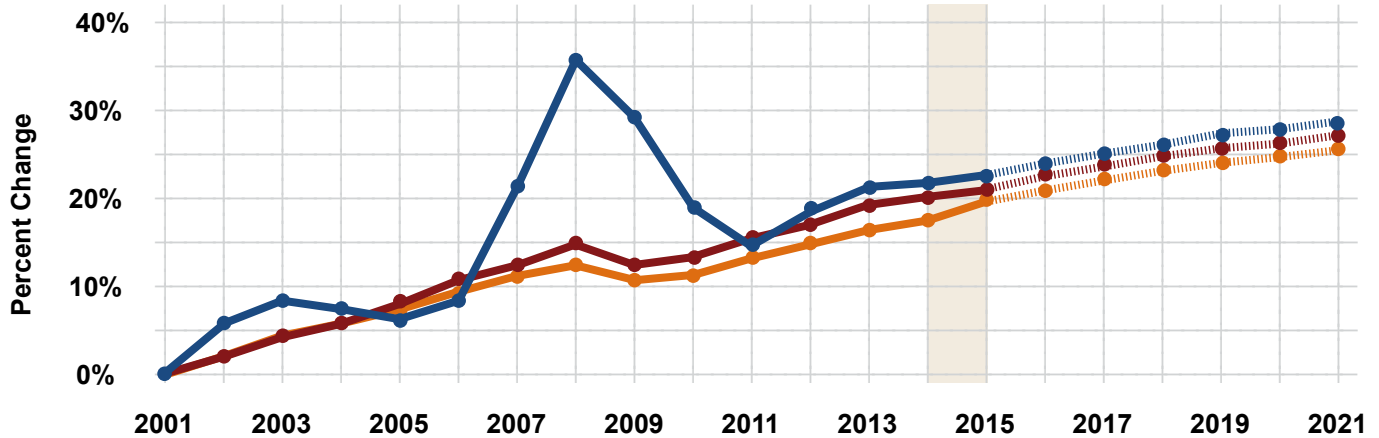
NAICS	Industry	Average Earnings 2015
22	Utilities	\$87,677
21	Mining, quarrying, and oil and gas extraction	\$74,208
91	Public administration	\$64,233
61	Educational services	\$60,358
55	Management of companies and enterprises	\$56,065
54	Professional, scientific and technical services	\$49,493
31-33	Manufacturing	\$46,996
23	Construction	\$46,039
48-49	Transportation and warehousing	\$44,166
51	Information and cultural industries	\$44,086

Source: EMSI Analyst projection, October 2016

The industries in Lanark County with the greatest average earnings in 2015 were utilities, mining, quarrying, and oil and gas extraction, and public administration.



REGIONAL TRENDS - RENFREW COUNTY



Region	2014 Jobs	2015 Jobs	% Change
Renfrew County	43,679	44,022	0.8%
Canada	15,969,528	16,138,520	1.1%
Ontario	6,056,167	6,180,670	2.1%

Total Jobs in Renfrew County in 2015:

44,022

Average Earnings in 2015:
86% of National Average

\$42,185

Renfrew County has experienced a rate of job growth (0.8%), below the Provincial and National averages. Although the average income of Renfrew County (\$42,185) is only 86% of the National Canadian average, it is projected that job growth will continue through 2021.

JOBS BY INDUSTRY - RENFREW COUNTY

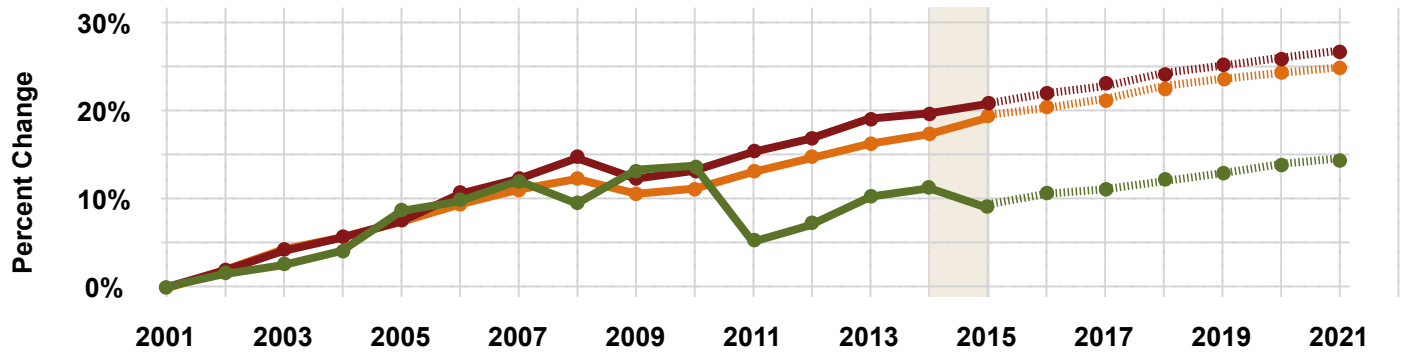
NAICS	Industry	2015 Jobs
91	Public administration	7,868
62	Health care and social assistance	5,656
44-45	Retail trade	5,603
31-33	Manufacturing	3,951
72	Accommodation and food services	3,272
54	Professional, scientific and technical services	3,126
61	Educational services	2,747
23	Construction	2,053
56	Administrative and support, waste management and remediation services	1,876
81	Other services (except public administration)	969

Source: EMSI Analyst projection, October 2016

Local Intelligence – Through information surveys, employers from within the retail trade and sales and service sectors have indicated that many recent high school and postsecondary graduates do not have the appropriate customer service skills to be successful. In addition, employers have expressed that applicants are not meeting the required motivation, attitude, and interpersonal abilities.

Employers have also indicated that many older workers do not have the required computer literacy skills to thrive in today's technologically fueled environment.

REGIONAL TRENDS - LANARK COUNTY



Region	2014 Jobs	2015 Jobs	% Change
Lanark County	21,652	21,332	-1.5%
Canada	15,969,528	16,138,520	1.1%
Ontario	6,056,167	6,180,670	2.1%

Total Jobs in Lanark County in 2015:

21,332

Average Earnings in 2015:
82% of National Average

\$40,458

Job growth in Lanark County dropped slightly by 1.5%. Although the average income of Lanark County (\$40,458) is only 82% of the National Canadian average, it is projected that job growth will occur through 2021.

JOBS BY INDUSTRY - LANARK COUNTY

NAICS	Industry	2015 Jobs
62	Health care and social assistance	3,829
44-45	Retail trade	3,771
31-33	Manufacturing	2,586
72	Accommodation and food services	1,701
61	Educational services	1,447
23	Construction	1,269
91	Public administration	1,155
48-49	Transportation and warehousing	879
54	Professional, scientific and technical services	738
56	Administrative and support, waste management and remediation services	641

Source: EMSI Analyst projection, October 2016

Local Intelligence – According to the **2015/2016 Employer One Survey Results**, local employers have suggested the top three competencies for future employees are Technical, Computer Literacy, and Teamwork/Interpersonal Skills.

Download the 2015/2016 Survey Results
here: www.renfrewlanark.com



LOCAL LABOUR MARKET CONDITIONS

NUMBER OF EMPLOYERS BY EMPLOYEE SIZE RANGE

This table shows the number of employers in Renfrew and Lanark Counties and Ontario in June 2015. Employers are categorized by the size of their workforce and range from owner-operator establishments with no employees to those businesses with more than 500 employees. It is important to note that the vast majority of businesses in Renfrew and Lanark counties fall into categories with less than 100 employees.

**Number of Employers by Employee Size Range
June 2016**

Enterprise Size	Employee Size Range	Renfrew County Number of Employers	Renfrew County Percentage of Employers	Lanark County Number of Employers	Lanark County Percentage of Employers	Ontario Number of Employers	Ontario Percentage of Employers
Small and Medium	0*	5,085	65.7%	4,206	61.8%	1,014,244	69.1%
	1 - 4	1,340	17.3%	1,096	17.7%	262,520	17.9%
	5 - 9	630	8.1%	395	6.4%	80,604	5.5%
	10 - 19	334	4.3%	272	4.4%	51,557	3.5%
	20-49	217	2.8%	134	2.2%	35,563	2.4%
	50-99	82	1.1%	43	0.7%	13,917	0.9%
	Subtotal	7,688	99.3%	6,146	99.4%	1,458,405	99.3%
Large	100-199	36	0.5%	24	0.4%	5,531	0.4%
	200-499	9	0.1%	10	0.2%	2,950	0.2%
	500+	9	0.1%	0	0.0%	1,191	0.1%
	Subtotal	54	0.7%	34	0.6%	9,672	0.7%
	Total	7,742	100%	6,180	100%	1,468,077	100%

Source: Canadian Business Patterns

In June 2016, Renfrew County had a total of 7,742 employers, and Lanark County had 6,180. Renfrew County had the same percentage of Small and Medium Enterprises (SMEs) and large businesses as Ontario; 99.3% and 0.7% respectively. Lanark County had a slightly higher percentage of SMEs at 99.4% and slightly lower percentage of large businesses at 0.6%.

This snapshot demonstrates a similar breakdown of employers by the size of their establishments between Renfrew and Lanark Counties and Ontario.

Local Intelligence – The greatest amount of growth and decline sorted by absolute change appears to be occurring in small businesses that employ less than nine individuals. According to the **2015/2016 Employer One Survey Results**, the greatest barriers for employees to receive ongoing training and education are cost and that relevant training is not offered locally.

Download the 2015/2016 Survey Results
here: www.renfrewlanark.com



* No payroll employees; includes owner/operators or firms with contract workers; assumes one worker.

DISTRIBUTION OF TOTAL EMPLOYERS BY 3-DIGIT INDUSTRY

The following tables highlight the industries with the largest distribution difference between employers in Renfrew County, Lanark County and the Province of Ontario. Included are industries with the greatest positive and negative differences.

**Distribution of Employers - Renfrew County
June 2016**

NAICS	Renfrew Distribution %	Ontario Distribution %	Distribution Difference
112 - Animal production and aquaculture	5.6%	1.4%	4.2%
238 - Specialty trade contractors	7.1%	5.3%	1.8%
811 - Repair and maintenance	3.3%	1.8%	1.5%
113 - Forestry and logging	1.4%	0.1%	1.3%
721 - Accommodation services	1.6%	0.4%	1.2%
484 - Truck transportation	1.5%	3.2%	-1.7%
541 - Professional, scientific and technical services	6.8%	12.6%	-5.8%

Source: Canadian Business Patterns

Renfrew County has a higher percentage of employers in animal production and aquaculture, specialty trade contractors and repair and maintenance than the Province of Ontario. Despite being the home of Canadian Nuclear Laboratories, Renfrew County has a lower percentage of professional, scientific and technical services than the province.

Local Intelligence – Forest Products Association of Canada expects that by 2020 there will be 60,000 new recruits to forestry in Canada. As the result of a lower Canadian dollar and fuel prices, the regional forestry sector continues to grow with many opportunities for youth and job seekers. The re-opening of Pembroke MDF plant in the summer of 2014 has helped re-energize the forestry sector within the region.

Full-time opportunities that currently exist within the sector include; lab support, health and safety, machine operator, industrial millwright, and electricians.

**Distribution of Employers Lanark County
June 2016**

NAICS	Lanark Distribution %	Ontario Distribution %	Distribution Difference
238 - Specialty trade contractors	12.1%	5.3%	6.9%
531 - Real estate	20.6%	15.5%	5.1%
112 - Animal production and aquaculture	5.6%	1.4%	4.2%
541 - Professional, scientific and technical services	16.2%	12.6%	3.7%
236 - Construction of buildings	5.7%	2.9%	2.9%
811 - Repair and maintenance	4.1%	1.8%	2.3%
111 - Crop production	3.6%	1.5%	2.0%
812 - Personal and laundry services	3.8%	1.8%	2.0%
722 - Food services and drinking places	4.4%	2.5%	1.9%
484 - Truck transportation	2.0%	3.2%	-1.2%

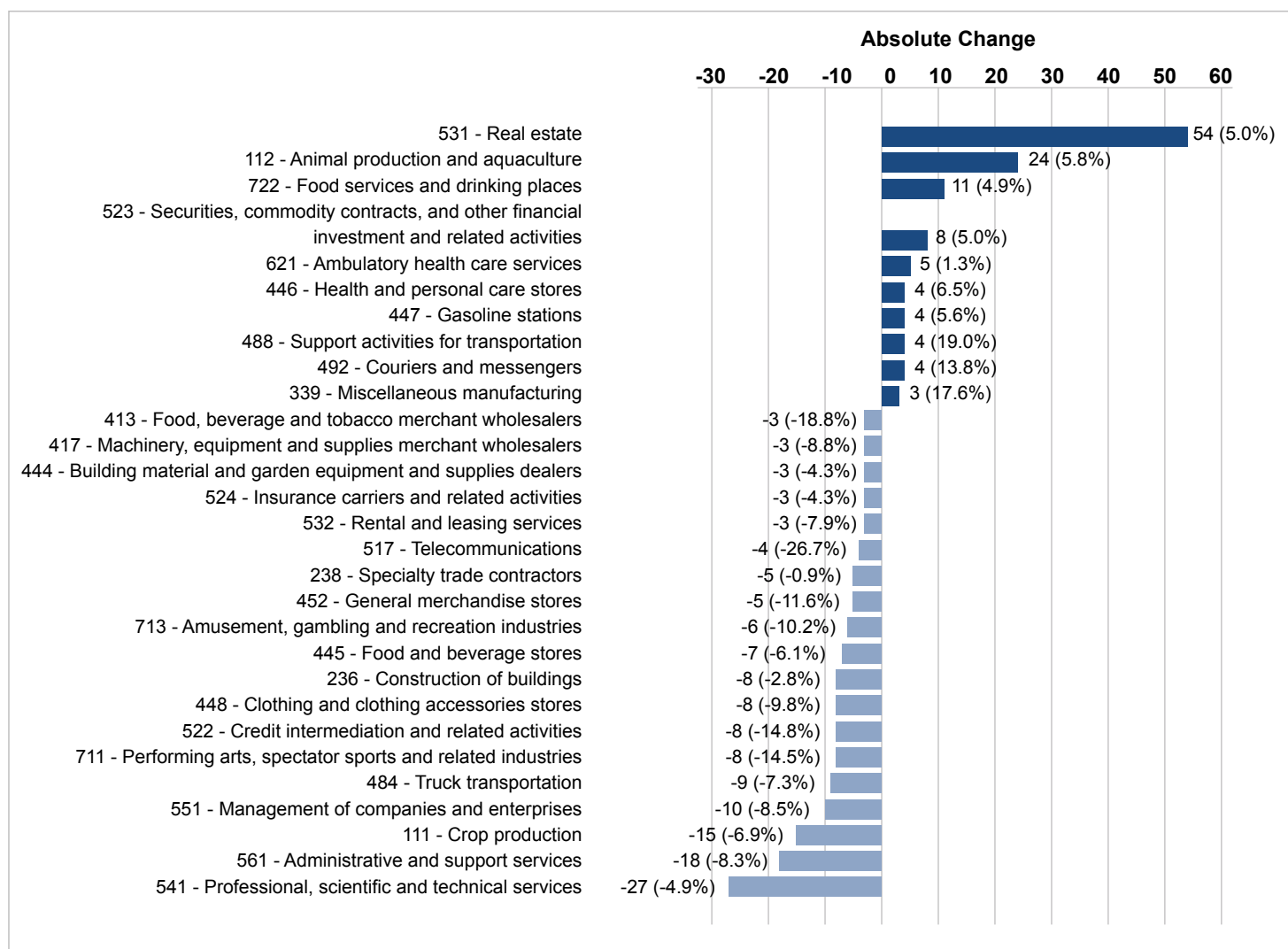
Source: Canadian Business Patterns

Lanark County has a higher percentage of specialty trade contractors, real estate and animal production and aquaculture compared to the Province of Ontario.

CHANGE IN THE TOTAL NUMBER OF EMPLOYERS

The following two graphs illustrate the most significant changes in the number of employers in Renfrew and Lanark Counties between December 2015 and June 2016, categorized by industry. Figures show industries where there was an increase or decrease of 3 or more employers.

**Change in Number of Employers - Renfrew County
June 2015 to June 2016**

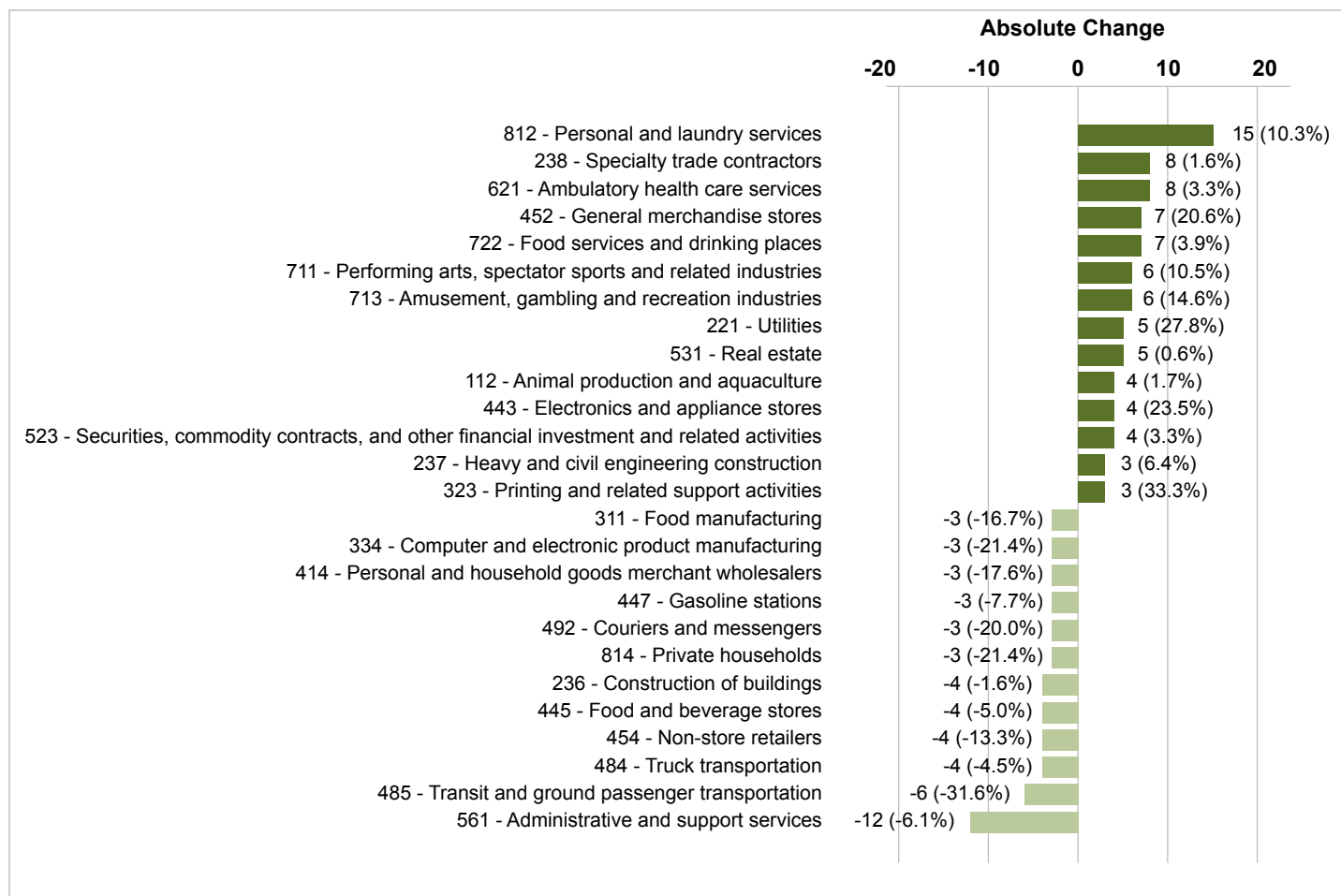


Source: Canadian Business Patterns

The industries in Renfrew County with the greatest absolute increases in the number of employers from 2015 to 2016 were real estate, animal production and aquaculture, and food services and drinking places. The industries with the greatest absolute decreases in the number of employers were professional, scientific and technical services, administrative and support services, and crop production.

Local Intelligence – Despite drier conditions during the summer months for most of Eastern Ontario, the regional agricultural sector continues to grow. Lower fuel prices and the Canadian dollar have been contributing factors to this success. Many agricultural operations have become technologically enhanced environments using the latest technology and computer applications to map soil and track yields. Access to capital and a qualified, educated and experienced workforce continue to be barriers to growth. Employment opportunities may exist for seed geneticists and certified crop advisors.

Change in Number of Employers - Lanark County June 2015 to June 2016



Source: Canadian Business Patterns

The industries in Lanark County with the greatest absolute increases in the number of employers from 2015 to 2016 were personal and laundry services, specialty trade contractors, and ambulatory health care services. The industries with the greatest absolute decreases in the number of employers were administrative and support services, transit and ground passenger transportation, and truck transportation.

Local Intelligence - With a growing need for health services in the region, hospitals have indicated there is a lack of health professionals in specialized areas. Registered Nurses with specific certifications are in high demand. This has led to employers reaching outside of the region to find these highly skilled individuals.



FASTEST GROWING INDUSTRIES AT THE 2-DIGIT NAIC LEVEL

The following graphs show the fastest growing industries according to place of work status at the 2-digit NAICS classification in Renfrew and Lanark Counties. Figures show the change in jobs in each industry from 2015 to 2016.

Fastest Growing Industries - Renfrew County 2015-16

Industry	2015 Jobs	2016 Jobs	Change in Jobs	Earnings per Worker
Professional, scientific and technical services	3,393	3,478	86	\$76,138
Health care and social assistance	5,392	5,459	66	\$37,233
Public administration	8,087	8,132	44	\$55,617
Manufacturing	3,945	3,975	30	\$52,443
Accommodation and food services	3,238	3,259	21	\$22,875
Retail trade	5,628	5,649	21	\$22,875
Administration and support, waste management and remediation services	1,769	1,784	15	\$25,316
Construction	1,914	1,923	9	\$44,168
Management of companies and enterprises	262	270	8	\$62,314
Information and cultural industries	712	718	7	\$34,350

Source: EMSI Analyst projection, October 2016

Fastest Growing Industries - Lanark County 2015-16

Industry	2015 Jobs	2016 Jobs	Change in Jobs	Earnings per Worker
Health care and social assistance	3,930	3,997	67	\$42,430
Retail trade	3,842	3,872	30	\$25,600
Educational services	1,395	1,417	22	\$60,358
Manufacturing	2,394	2,413	20	\$46,996
Accommodation and food services	1,824	1,839	14	\$15,069
Construction	1,253	1,265	12	\$46,039
Administration and support, waste management and remediation services	784	795	8	\$27,803
Professional, scientific and technical services	757	765	11	\$27,803
Arts, entertainment and recreation	478	485	6	\$32,658
Transportation and warehousing	883	888	5	\$44,166

Source: EMSI Analyst projection, October 2016

The fastest growing industries in Renfrew County are professional, scientific and technical services, health care and social assistance, and public administration. In Lanark County, the fastest growing industries are health care and social assistance, retail trade, and educational services.

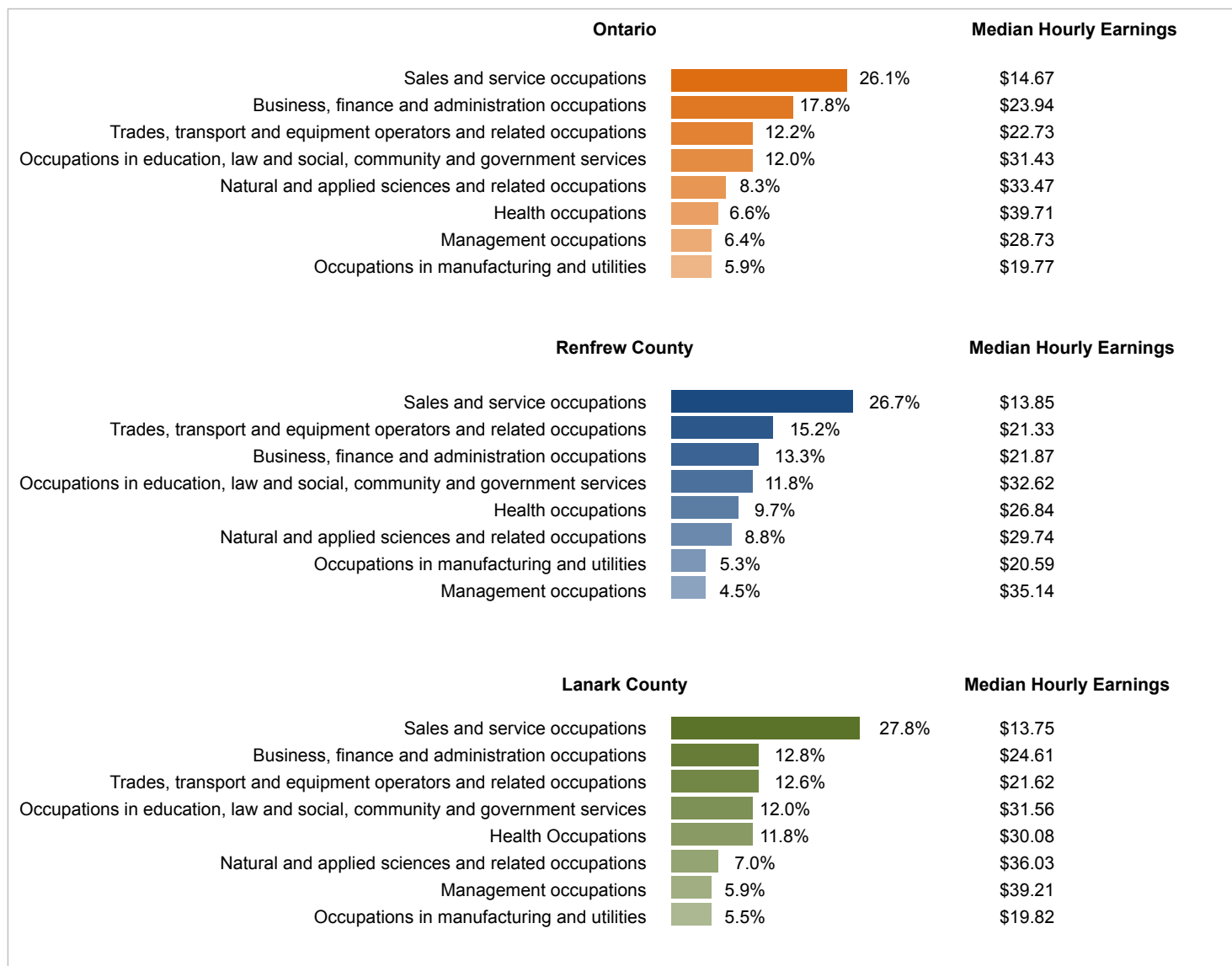
Local Intelligence - It is important for job seekers to note that most employers within the fastest growing sectors require a minimal education standard of a grade 12 diploma and more require some degree of post-secondary training.

According to the **2015/2016 Employer One Survey Results**, Occupations predominantly requiring a minimum level of education of high school diploma or equivalent include Production Workers, and Other. Trade certificates are required for most occupations in Trades (Journey person). College diplomas are the minimum level of education for most Technical, Sales and Marketing, Administrative and Clerical, and Service Worker occupations. Occupations requiring a minimum level of education of undergraduate degree and professional accreditation or graduate degree include Managers and Executives, and Professionals (e.g. Engineers, Accountants).

HIGHEST RANKED OCCUPATIONS BY NOC SKILL TYPE

The following graphs show the highest ranked occupation categories according to NOC Skill Type in Ontario, Renfrew and Lanark Counties. Figures show the occupations as a percentage of the total labour force 15 years and over in each region as well as the median hourly earnings for each category.

Top 8 Occupational Categories 2016



Source: EMSI Analyst projection, October 2016

In both Renfrew and Lanark Counties, as well as Ontario, the highest percentage of residents are employed in sales and service occupations; 26.7% in Renfrew County and 27.8% in Lanark County, and 26.1% in Ontario as a whole.

Local Intelligence - The Ontario East Economic Development Commission has estimated there are nearly 20,000 municipal employees in Eastern Ontario. Conservative estimates indicate that 35% of municipal employees are expected to retire in the next 5-7 years. Opportunities may exist for the creation of professional development programs to prepare job seekers for openings in this public sector.

NUMBER OF BUSINESSES BY EMPLOYEE SIZE RANGE AND 3-DIGIT INDUSTRY

The following tables show the top 20 industries in Renfrew County and Lanark County broken down by employee size range. Industries are listed based on number of employers.

Renfrew County - June 2016

NAICS 3 digit industry subsector	Employee Size Range									Total Number of Employers	%
	0*	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500 +		
531 - Real estate	1,073	40	11	4	1	0	1	0	0	1,130	14.6%
238 - Specialty trade contractors	302	156	53	24	9	1	1	0	0	546	7.1%
541 - Professional, scientific and technical services	369	105	29	13	7	1	0	0	1	525	6.8%
112 - Animal production and aquaculture	390	38	7	1	1	0	0	0	0	437	5.6%
621 - Ambulatory health care services	194	116	42	17	5	1	3	0	0	378	4.9%
236 - Construction of buildings	166	66	35	8	1	0	1	0	0	277	3.6%
811 - Repair and maintenance	153	64	28	6	3	1	0	0	0	255	3.3%
722 - Food services and drinking places	67	28	48	45	38	10	0	0	0	236	3.0%
111 - Crop production	178	14	7	1	1	0	0	0	0	201	2.6%
561 - Administrative and support services	115	42	17	18	5	1	0	0	0	198	2.6%
813 - Religious, grant-making, civic, and professional and similar organizations	51	92	27	6	1	0	0	0	0	177	2.3%
812 - Personal and laundry services	105	43	19	3	0	0	0	0	0	170	2.2%
523 - Securities, commodity contracts, and other financial investment and related activities	146	16	2	1	1	2	1	0	0	169	2.2%
721 - Accommodation services	68	25	14	5	7	2	3	0	0	124	1.6%
484 - Truck transportation	76	27	3	5	3	1	0	0	0	115	1.5%
551 - Management of companies and enterprises	94	9	4	0	0	1	0	0	0		1.4%
445 - Food and beverage stores	41	24	14	13	3	9	2	0	1	107	1.4%
113 - Forestry and logging	66	25	8	5	2	0	0	0	0	106	1.4%
441 - Motor vehicle and parts dealers	39	14	14	14	13	0	0	0	0	94	1.2%
624 - Social assistance	59	10	3	5	8	2	2	0	0	89	1.1%

Source: Canadian Business Patterns

The three industries in Renfrew County that have the greatest number of employers are real estate, specialty trade contractors, and professional, scientific and technical services. Specialty trade contractors and professional, scientific and technical services have remained in the top 5 since 2008, while real estate has experienced significant growth. The growth in the real estate sector may be attributed to new housing developments in the Petawawa area. Due to posting cycles of military personnel at Garrison Petawawa, there is a higher turnover rate in the real estate market.

Local Intelligence - In an attempt to increase the retention of food service employees, employers have attempted to increase the number of full-time positions offered. However, part-time positions remain dominant in the food and hospitality industry.

The health care sector has continued to increase. Community health care agencies and long-term care facilities have noted a shortage in personal support workers and nurses. These shortages are often dependent on the community; the more rural the community, the greater the shortage.

Lanark County - June 2016

NAICS 3 digit industry subsector	Employee Size Range									Total Number of Employers	%
	0*	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500 +		
531 - Real estate	825	28	3	7	2	1	1	0	0	867	11.2%
541 - Professional, scientific and technical services	484	151	29	15	2	1	0	0	0	682	8.8%
238 - Specialty trade contractors	300	124	55	25	4	1	1	0	0	510	6.6%
621 - Ambulatory health care services	141	73	22	11	1	1	3	0	0	252	3.3%
236 - Construction of buildings	143	69	17	8	4	0	0	0	0	241	3.1%
112 - Animal production and aquaculture	208	21	4	1	1	0	0	0	0	235	3.0%
722 - Food services and drinking places	54	27	39	35	29	2	0	0	0	186	2.4%
561 - Administrative and support services	121	35	19	7	1	0	1	0	0	184	2.4%
811 - Repair and maintenance	109	47	15	1	1	0	0	0	0	173	2.2%
812 - Personal and laundry services	98	38	15	5	4	0	0	0	0	160	2.1%
111 - Crop production	124	20	1	3	2	0	1	0	0	151	2.0%
523 - Securities, commodity contracts, and other financial investment and related activities	106	16	2	1	1	0	0	0	0	126	1.6%
813 - Religious, grant-making, civic, and professional and similar organizations	46	45	12	6	0	0	0	0	0	109	1.4%
551 - Management of companies and enterprises	90	7	2	2	0	0	0	0	0	101	1.3%
484 - Truck transportation	61	13	5	2	4	0	0	0	0	85	1.1%
624 - Social assistance	52	9	5	7	3	1	0	0	0	77	1.0%
445 - Food and beverage stores	35	9	13	9	4	2	4	0	0	76	1.0%
453 - Miscellaneous store retailers	38	22	8	5	2	0	0	0	0	75	1.0%
441 - Motor vehicle and parts dealers	28	12	4	18	4	0	0	0	0	66	0.9%
711 - Performing arts, spectator sports and related industries	58	2	2	0	0	1	0	0	0	63	0.8%

Source: Canadian Business Patterns

The three industries in Lanark County that have the greatest number of employers are real estate, professional, scientific and technical services and specialty trade contractors. Professional, scientific and technical services and specialty trade contractors have remained in the top 3 since 2008 while real estate has been steadily working its way to the top since 2008.

Local Intelligence - Regional employment service providers have recommended that job seekers across the region would benefit from more internship or experience-based learning opportunities to increase their prospects of employment. The lack of practical experience is a barrier for job seekers when looking at re-entering the workforce. Local Employment Services have indicated an increase in the number of trades, hospitality, and food services employers offering placement positions for Employment Services clients.

According to the **2015/2016 Employer One Survey Results**, Unpaid Co-op is the most common workplace-relevant training for students in Renfrew and Lanark Counties. These opportunities are primarily offered to high school students. College students are generally offered paid co-op opportunities. In the Summer of 2016, Algonquin College's Pembroke Campus placed approximately 40 co-op students with local employers in Renfrew County.

Download the 2015/2016 Survey Results
here: www.renfrewlanark.com



* No payroll employees; includes owner/operators or firms with contract workers; assumes one worker.

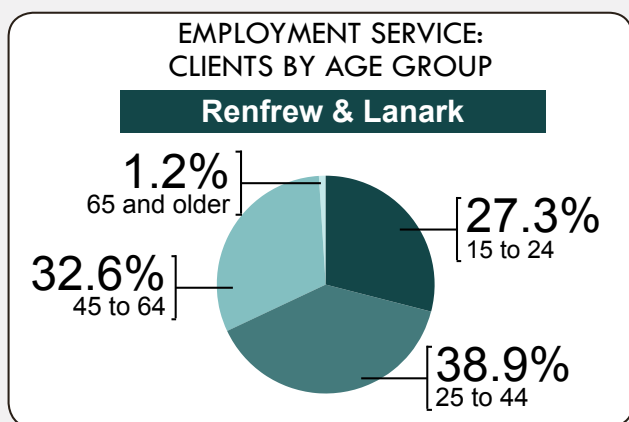
EMPLOYMENT ONTARIO CLIENT DATA

2015/2016

For the fourth consecutive year, the Ministry of Advanced Education and Skills Development (MAESD) has made Employment Ontario data reports available for the purpose of the LLMP Report. The Labour Market Group of Renfrew & Lanark applies this data to make a comparative analysis using the baseline information from the 2015-2016 fiscal year. If you work in employment, literacy or economic development services, this information may be useful to compare to your statistical findings. Infographics are available upon request to the Labour Market Group of Renfrew & Lanark.

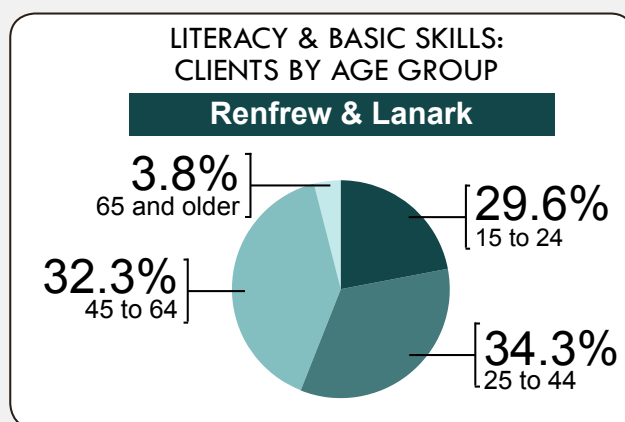
In Renfrew & Lanark Counties, there are...

- 16** Service Providers
- 3,770** Employment Service Assisted Clients
- 654** Literacy & Basic Skills Learners



In Renfrew & Lanark Counties, the majority of Employment Services assisted clients* fall between the ages of 25 and 44.

The age category with the most significant change from last year is the 15 to 24 year-olds with a decrease of clients by 1.5%. There was a 1% increase of 45 to 64 year-old clients.



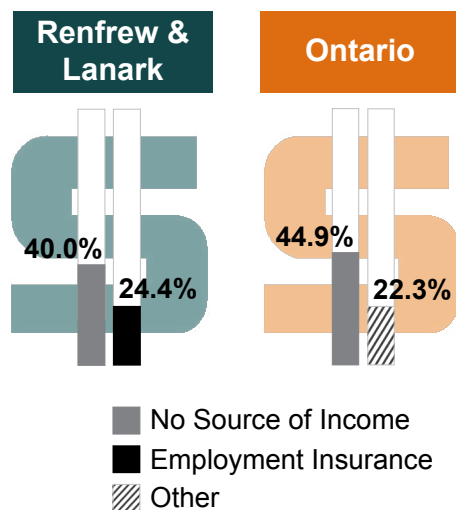
The majority of Literacy and Basic Skills Clients fall between the ages 25 and 44. There was a 0.1% decrease in this age category from last year.

The age category with the greatest increase from last year is the 15 to 24 year-olds with an increase of clients by 8.1%, indicating a shift to a younger client base.

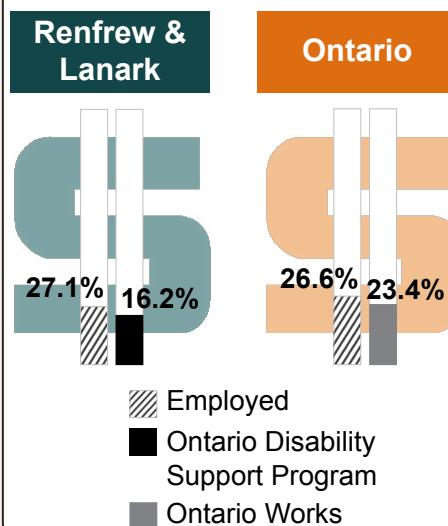
** Assisted client numbers do not reflect the total number of clients visiting Employment Ontario Providers.*

EMPLOYMENT ONTARIO CLIENT DATA

TOP 2 SOURCES OF INCOME FOR EMPLOYMENT SERVICE CLIENTS



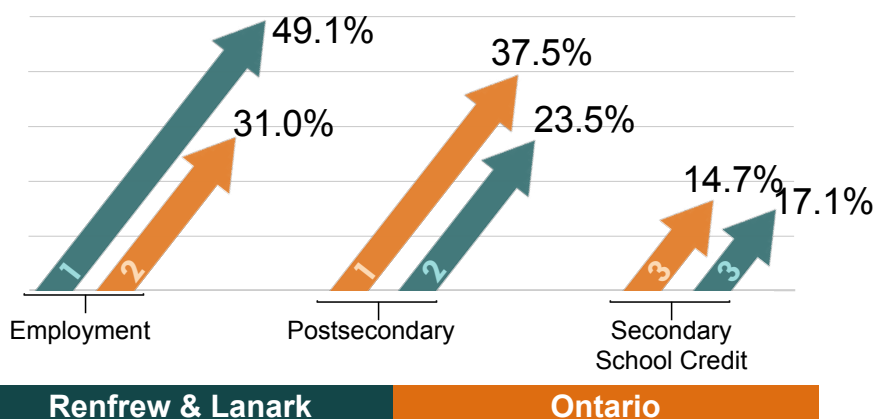
TOP 2 SOURCES OF INCOME FOR LITERACY AND BASIC SKILLS LEARNERS



The percentage of Employment Service clients without a source of income in Renfrew & Lanark Counties has increased by 0.7% for the 2015/2016 year. The provincial number of clients without a source of income has climbed 0.9% from last fiscal year. The most significant increases during this period were in Employment Insurance, 1.7% in Renfrew & Lanark.

In Renfrew and Lanark, the top source of income for LBS learners in 2015/16 was employment (27.1%) and Ontario Disability Support Program (16.2%).

LITERACY & BASIC SKILLS TOP 3 LEARNER GOAL PATHS



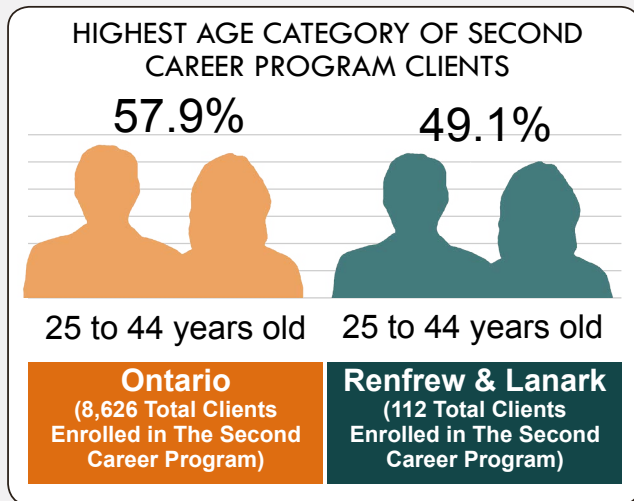
In Renfrew & Lanark Counties...

There were **82** Internationally Trained Individuals out of the 3,770 Employment Service Assisted Clients.

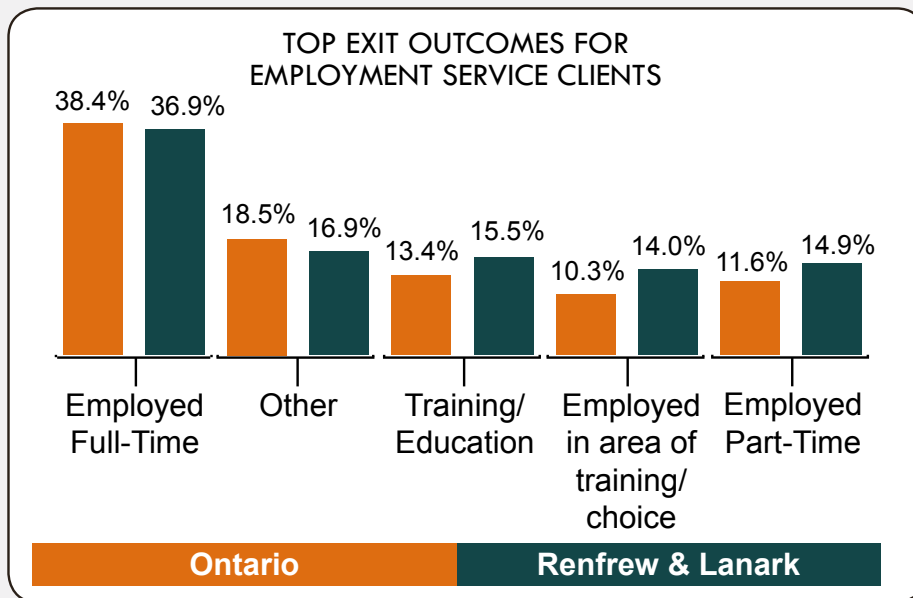
The Employment goal path continues to be the top pathway for LBS learners in Renfrew and Lanark Counties. 23.5% of learners indicated postsecondary schooling as their goal path, moving postsecondary into the second top learner goal path for LBS learners in Renfrew and Lanark Counties.

Local Intelligence - Although there has been an increase in younger clients within Literacy and Basic Skills programs, LBS have indicated an increase in clients between 45 and 60 years old seeking digital technology courses. Programs are conducted through computer-based learning, which allows clients to gain computer skills while enhancing other literacy and basic skills simultaneously.

EMPLOYMENT ONTARIO CLIENT DATA



The amount of Second Career clients in Renfrew and Lanark counties that are between the ages of 15 and 24 years old has risen 5.2 % since last year. The category with the most significant decrease was the 25 to 44 year-olds with a drop of 3.6%.



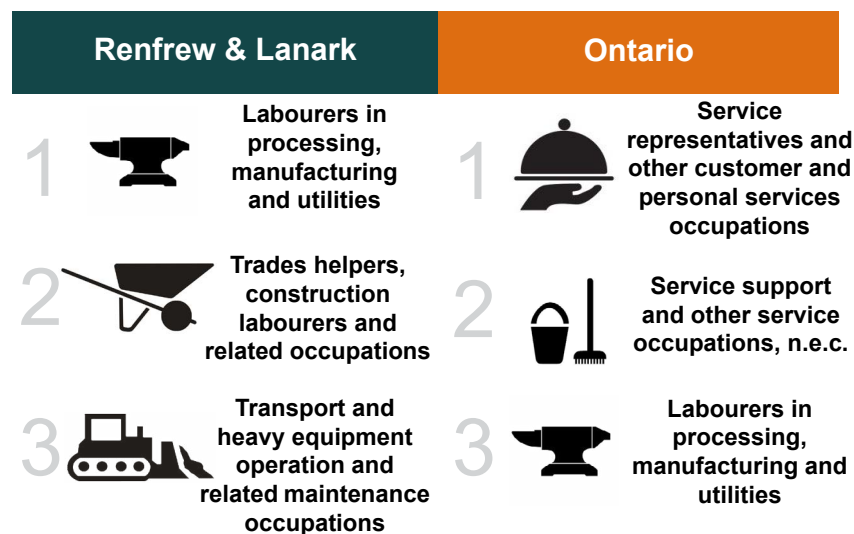
Renfrew and Lanark Counties experienced an increase of 7.8% in the number of clients exiting Employment Services who are employed full time.

The amount of clients employed within their area of training has risen by 1.0%.

Local Intelligence – Service providers from a variety of agencies have indicated that inter-generational poverty, addiction, and mental health issues are increasingly being identified as barriers to employment. In particular, Post Traumatic Stress Disorder has been indicated in the region as a barrier to employment. Opportunities may exist to provide professional development regarding Mental Health First Aid training for staff working with high-risk clients. Algonquin College Waterfront Campus in Pembroke currently offers this program on an in demand basis.

EMPLOYMENT ONTARIO CLIENT DATA

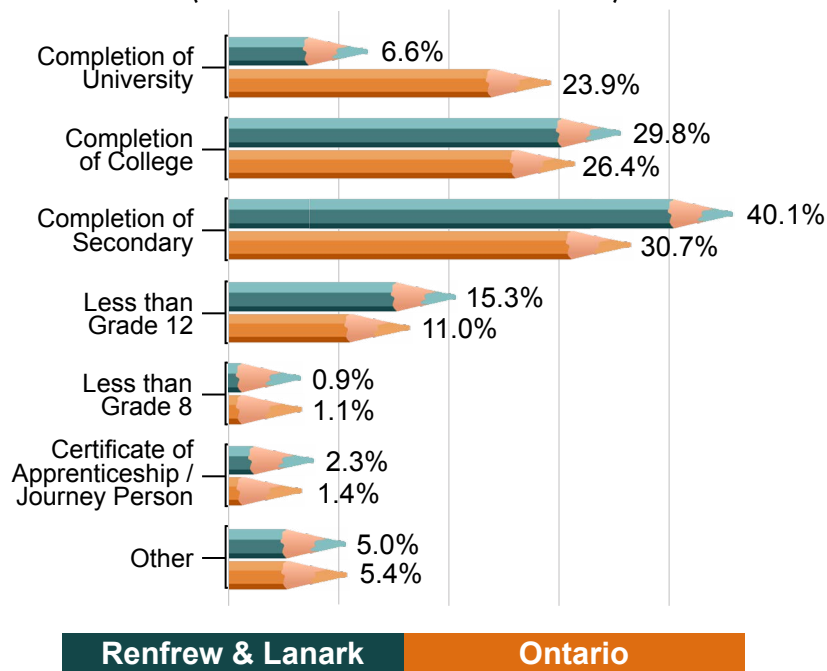
EMPLOYMENT SERVICE - TOP 3 EMPLOYED OUTCOME OCCUPATIONS (NOC) 2-DIGIT GROUP



Local Intelligence - Many small businesses have indicated that training costs for new hires and existing employees are too expensive. Not being able to access specific training opportunities (i.e. automotive tire technician, wood grader) within the region has also been identified as a barrier to growth. The Canada-Ontario Job Grant program may help alleviate some of these employer issues. For an overview of the Canada-Ontario Job Grant, please see page 25 of this report.

According to the **2015/2016 Employer One Survey Results**, 77.6% of employers had no assistance from a free employment service agency, 22.5% used youth-targeted assistance (15-24 years of age), and 8.2% used persons with disabilities or older workers targeted assistance (55 and older).

EDUCATIONAL ATTAINMENT AT INTAKE (EMPLOYMENT SERVICE CLIENTS)



SECOND CAREER - TOP 3 SKILLS TRAINING PROGRAMS (NOC) 4-DIGIT GROUP

1  **Transport Truck Drivers**

When there are less than 10 people in an occupation group, the numbers are suppressed to represent zero. Therefore our region only lists one occupation for Second Career Skills Training Programs.

Transport Truck Drivers continues to be the top career training path that Second Career clients are choosing.

TOP 3 TRADES FOR NEW APPRENTICESHIP REGISTRATIONS (NOC) 4-DIGIT GROUP

1  **Automotive Service Technician**

2  **General Carpenter**

3  **Hairstylist**

Local Intelligence - Perth is unique in the Ottawa Valley in that there is a high concentration of heavy industry including Albany International, 3M Canada, and Omya Canada Inc. Ensuring that the local workforce matches the current and future needs of heavy industry will be critical for the retention and growth of major employers.

EMPLOYER PROGRAMS OFFERED BY EMPLOYMENT SERVICES

Employer Programs offered by local Employment Ontario Employment Services (ES)

Local Employment Ontario Employment Services offer a wide variety of programs and services that support employers when they are hiring new employees. These services are free to all Ontario employers.

Employers are a key partner in helping ES providers assist unemployed individuals with gaining sustainable employment. They connect with hundreds of job seekers annually and can help businesses find the right person for the job. In some cases, they offer training incentives to employers to help pay training costs. This can include short job trials or extended placement experiences. They also offer an apprenticeship signing bonus to employers who qualify, when they commit to training an apprentice in a skilled trade occupation.

The **Canada-Ontario Job Grant** provides an opportunity for employers to invest in their workforce. The grant offers direct financial support of up to two-thirds of the costs to individual employers who wish to purchase training for their workforce.

The **Targeted Initiative for Older Workers (TIOW)** provides individuals between the ages of 55 and 64 with programming aimed at increasing their employability, reintegrating them into employment, and ensuring they remain active and productive labour market participants in their communities.

The **Youth Job Connection** (15 to 29 years old) & **Youth Job Connection-Summer Programs** (15 to 18 years old) provide help to young people who face multiple or serious barriers to employment. It provides access to employability and employment skills development, along with education/training and work experiences.

The **Youth Job Link Program** is designed to provide youth, including students, between the ages of 15 and 29 who face few barriers to employment with access to non-intensive employment and career resources and information.

ES providers can also assist employers in the hiring process. They will post job opportunities, host job fairs and job expos, pre-screen applicants, and offer their centres to hold interviews.

Local Employment Ontario Employment Services also offer industry recognized employment and safety related online training courses.

For more information, please visit your Local Employment Ontario Service Provider.

www.algonquincollege.com/renfrewlanark/employment-ontario
www.ontario.ca/employmentontario



LOCAL IMMIGRATION PARTNERSHIP PROGRAM



The Local Immigration Partnership of Renfrew & Lanark (LIP) was funded in April of 2011 and the project focused on improving local attraction, settlement and retention of newcomers, has been carrying out the work on a variety of levels since. The project will be funded through March 2020, making up eight years of service to the region at that time.

In fiscal 2015/2016 and 2016/2017, the project carried out two specific initiatives – engaging with municipal leaders for top-down impact and supporting the local settlement of privately sponsored refugees. Since October 2015, the LIP Project Manager delivered

twenty-five municipal council presentations to bring about some awareness of the changing demographics and, consequently, the shrinking labour force. Each presentation featured an outline of what LIP is, who are the primary partners and what we aim to achieve. However, the crucial elements of the messaging focused on population demographic spread in the current and future states. We forecasted population change for each municipality and found that, on average, most will nearly double their senior citizen population, causing the working age population to shrink dramatically as youth out-migrate and little intake is demonstrated through migration or immigration levels. Statistics like 1) how many income-earners versus retirees are present now and into 2025, 2) the estimated number of job vacancies and contrasting low levels of labour supply, and 3) magnitudes of labour force participation moving ten years ahead, were all presented in order to articulate the need for this work in proactive terms.

The presentations also highlighted the clear and documented benefits to welcoming and integrating newcomers as a direct solution to these issues. If communities can work together from the elected leaders forming good policy down to the grass-roots programs shifting their paradigms and action, our region can participate fully in a prosperous economic future. A research study conducted by the Ontario government boasts a single theme to newcomer attractiveness and retention to any community – that the perception of a welcoming community is critical to long term retention. When policy-makers and ground-level programmers position their services or offerings in welcoming ways, newcomers respond with their long-term investment and integration into the community. The communities must lead in these endeavours and LIP is well positioned to support them in doing so for the next three fiscal years.

The LIP project, being the only formal entity in the region focused on themes of long-term planning and support, came forward as a support mechanism for groups engaged in the private sponsorship of refugees. During the initial needs analysis phase, the LIP Project Manager met with every possible group to determine the largest gaps in resources, education and support for the positive resettlement of refugees locally. The first action item was to develop an online resource page for all of the members of each group to access for information. Resources such as interpretation service listings, handbook samples, and good news stories are featured on the page at www.immigrationpartnershiprenfrewlanark.com/refugees.

Secondly, the LIP partners assembled to support the development of a Welcoming Syrians training module. Subsequently, the Project Manager connected with the London Cross-Cultural Learner Centre and was able to obtain well-developed curriculum and a facilitation training session to make this series available in Renfrew Lanark. We have since delivered this module to over twenty audiences in the region to various interested groups such as health care service providers, high school students, Ontario Ministry program participants, groups for the private sponsorship of refugees and so on.

Lastly, the LIP Project Manager, in partnership with local English as a Second Language (ESL) experts led a discussion surrounding the provision of ESL to communities in the region who do not have formal Ministry funded classes available to them. This discussion resulted in seeking out funding to support the execution of a rural ESL model in order to support the outlying communities who have generously sponsored refugees and welcomed these families into the community. LIP is committed to supporting the provision of ESL, as language is primary to positive employment, and employment is primary to long-term retention and integration. The results of this program initiative will be contained in the subsequent update.

Moving forward, LIP is positioned to target another initiative, in addition to our ongoing work with municipalities and settlement support for refugees. The project is positioned to shift the education and awareness section of our work directly towards the youth population. Our plan is to engage with youth on a variety of levels, supporting the needs of newcomer youth who have arrived through regular immigration channels, as refugees or as international students. We also plan to educate and encourage the Canadian-born youth to participate in intercultural competency practice and to truly understand the benefits of diversity to their personal and professional lives now and into the future. The over-arching objective is to act as a change agent in the long-term for lasting positive perspectives and behaviours surrounding valuing diversity within the families who live in the communities we serve.

www.immigrationpartnershiprenfrewlanark.com



Your Workforce. Our Future.

Survey Results

2015/2016

The **Employer One Survey** provides Renfrew and Lanark County businesses, service providers and educators with valuable insights into local skill and human resource requirements. It is designed to collect information from employers on a range of labour issues, such as recruitment difficulties and current and future skill shortages. This survey is the first in a series and represents our baseline year. The value will be increased in the years following as we establish labour force trends with our local employers.

Highlights

85 employers completed the Survey.

The top 2 industries represented were Retail Trade, **22%** and Health Care and Social Assistance, **21%**

2,369 employees were represented in the survey

53% of surveyed employers had a separation over the last 12 months

69% of surveyed employers hired in the last 12 months

The occupation in which most employees were hired was Customer Relations Associate, **271**

65% anticipate hires in the next year

75% of employers provided or support ongoing training and education opportunities for their employees last year

The top three competencies for current employees are; Work ethic, dedication, dependability, Self-motivated/ability to work with little to no supervision, and Technical. The top three competencies for future employees are; Technical, Computer literacy and Teamwork/Interpersonal.

The most common source of training/education for employees was **On the job, 37%**

Unpaid Co-op is the most common workplace-relevant training for students and future workers in Renfrew and Lanark Counties. These opportunities are primarily offered to high school and college students.



Download the
Survey Report here.



Employers, we need your input...

The **Employer One Survey** will provide Renfrew and Lanark County Businesses, service providers and educators with valuable insights into local skills and human resources requirements. It is designed to collect information from employers on a range of labour issues, such as recruitment difficulties and current and future skill shortages.

The results will assist your community to accurately respond to your business needs.

- Identify & expand opportunities for growth
- Plan for the future
- Get customized workforce profiles for your organization immediately
- See regional results
- Ensure Renfrew and Lanark Counties have an efficient workforce



The **Employer One Survey** is unique due to its focus on our rural regions. Predominantly, the data available covers a greater geographical area and does not directly reflect our regions and industries. This is your opportunity to participate in a locally based employment survey.

To view **Survey Results** from the **2015/2016 Employer One Survey**, please visit our website at:
www.renfrewlanark.com

Each participant will be entered into our Participation Raffle Draw for a chance to win:

- Business Profile Video
- iPod Shuffle
- \$100 Restaurant Gift Certificate



To complete the Survey online, please visit:
<https://www.surveymonkey.com/r/7P26WFV>



For more information, please contact us at:
renfrewlanark@gmail.com



ACTION PLAN REVIEW **2015/2016**

The following is a brief summary of the projects undertaken from 2015-2016 and the outcomes achieved.

PROJECT 1: EMPLOYER ONE SURVEY (2015-2016)	
Project Description	The intent of the project is to mine data and local information directly from local employers regarding their staffing and training requirements.
Measurable Outcomes	A greater understanding of local employer's current and future workforce and training requirements.
	Successful completion of 85 Employer One surveys by local employers.
Project Outputs	A detailed report summarizing the information gathered from employers submitted to the MAESD in March 2016.
	All collected data and labour market intelligence was shared with the partners, who in turn, use it in ways that ultimately serve the needs of the region's labour market.
	Presentations on Employer One results to Employment Services groups and job seekers.
Key Partners	Regional employers, Local chamber of commerce groups, Employment Ontario network.
PROJECT 2: SERVICE COORDINATION	
Project Description	Develop an inventory of employers and agencies in order to analyze any local employment data available. Facilitate a professional development day for job developers and Employment Ontario staff within the region with intent to increase coordination and communication across the region.
Measurable Outcomes	Inventory of over 550 local employers developed.
	Professional Development day facilitated by, Performance Management Consultant, Angela Hoyt in February 2016. 35 agencies throughout Renfrew and Lanark County were present with a total of 40 participants.
Project Outputs	The distribution of local labour market information packages, mined using EMSI tool, to every EO and LBS agency within the region in May 2016.
	Update EO and LBS contact information for local rack cards.
	Overall participant satisfaction score of 91% based on Professional Development Day.
Key Partners	Employment Ontario, Literacy and Basic Skills, Ontario Works, Ontario Disability Support Program, Community Living and regional housing agencies and any other regional job developers will be invited from both counties to attend.

JOB DEVELOPERS **CONSULTATION**

The Labour Market Group of Renfrew and Lanark coordinated a consultation session with job developers from 6 agencies across both counties (June 2016). A few of the main issues that arose during the discussion were; hitting target numbers, a lack of adequate training, and exhausting employers.

They indicated that finding opportunities to measure and weigh anecdotal information should be a priority. The group agreed a stronger focus on situational targets and circulating success stories from agencies would help steer the focus back to individual goals. Job developers also indicated onboarding training would be a useful tool to prepare new developers for their role in the community.

Employment services in rural regions face multiple challenges, namely exhausting employers. The group discussed the creation of a shared online database that would help streamline the process and track employer participants and any contact with the employer. This could be an opportunity for job developers to cut down on time consumption and focus more on their clients.



PLAN OF ACTION 2016/2017

The following Plan of Action has been developed to address the current and future local labour market challenges in Renfrew and Lanark Counties. Project 1 focuses on gathering and distributing Local Labour Market Information, and Project 2 focuses on service coordination. The goal of the projects is to provide clear and accurate information to employers and job seekers within the region. Below is a summary of the activities the Labour Market Group will be leading through 2017.

PROJECT 1: EMPLOYER ONE SURVEY (2016-2017)	
Project Description	To conduct the employer one survey with 150 employers within the region. The goal of the project is to mine data and local information directly from local employers regarding their staffing and training requirements.
Issue/Priority	Insufficient data to determine if the training and staffing requirement of local employers are currently being met. Job seekers also lack current information regarding employment opportunities available locally.
Measurable Outcomes	The project builds an expanded employer database, improves the source of local labour market information to support community planning, and enhances employment outcomes. Additionally, Employment Ontario service providers gain a better understanding of the training and staffing requirements of local employers.
Key Partners	The Labour Market Group, Employment Ontario agencies and local employers.



PLAN OF ACTION **2016/2017**

PROJECT 2: SERVICE COORDINATION	
Project Description	Develop an inventory of employers and agencies and analyze any local employment data available.
	Create an on-line directory of regional employment services with supporting marketing materials.
	Facilitate a professional development day for job developers and Employment Ontario staff within the region.
Issue/Priority	There is a current lack of awareness in regards to employment and training support services that are available for employers and job seekers within the region. Employers have also noted that they are being contacted by job developers from a variety of employment agencies which is leading to a general sense of fatigue and confusion within employer groups. The Labour Market Group understands that improved service coordination and better inter-agency communication within the region would assist in addressing this issue. Creating professional development opportunities for regional job developers and collaborating on common community focused marketing materials could potentially solve this issue.
Measurable Outcomes	The development of a comprehensive directory of regional employment services organized at the community level. The directory of services will be made available electronically and in print. The electronic version will be housed online at www.renfrewlanark.com . Supporting marketing materials will also be developed to promote the directory and our regional employment services.
Key Partners	The Labour Market Group, Employment Ontario agencies, Chambers of Commerce, Enterprise Renfrew County, Lanark-North Leeds Enterprise Centre, Renfrew Industrial Commission, The Ministry of Advanced Education and Skills Development, Excellence in Manufacturing Consortium, County of Renfrew Economic Development, small and medium business owners and managers.



APPENDIX A: COMMUNITY CONSULTATION PARTICIPANTS

The LMG of Renfrew Lanark engages with hundreds of employers and community partners every year. Below is a partial list of the people we are proud to work with.

Adult Learning and Training Centre	Levesque, Pauline
Albany International Canada	Little, Joanne
Algonquin College	Bramburger, Jamie Davis, Anne Dick, Brent Kidd, Jennifer Moon, Wendy
Algonquin Employment Services Perth	Clark, Colleen Laut, Debbie
Algonquins of Pikwàkanagàn	Two-Axe Kohoko, Amanda Meness, Lisa Lightbody, Christine
Arnprior Aerospace	Pierce, Brent
Arnprior and District Memorial Hospital	Woods, Cyndy
Arnprior Builders' Supplies	Sullivan, Tom
Arnprior Economic Development	Wilson, Lindsay
Bonnechere Caves	Hinsperger, Chris
Calabogie & Area Business Assoc.	Jakes, Carolyn Parker, Bruce
Canadian Career Academy, Carleton Place	Bennett, Laura Field, Kim Probert, Rob
Canadian Nuclear Laboratories	Quinn, Pat Sweet, Susan
Canadian Tire, Deep River	Fitton, Will
Canadian Tire, Pembroke	Birch, John
Career Transition Services	Hardy, Trudy
Carleton Place & District Chamber of Commerce	Kavenagh, Jackie MacDonald, Donna
City of Pembroke	LeMay, Mike
Community Employment Services, Pembroke	Dick, Brent
Community Living Association, Lanark	Wright, Bruce
Community Living Upper Ottawa Valley	Grayson, Chris Wilson, Tina
Community Resource Centre	King, Joanne
County of Renfrew, Economic Development & Natural Resources	Baird, Alastair Wybou, David
County of Renfrew, Ontario Works	Dombroskie, Jennifer
Deep River and District Hospital	Wilkie, Ian
East Side Mario's, Pembroke	Gauthier, Jen
Economic Development & Employability Network of Ontario	Lamb, Guillaume Plourde, Martine
Employment Networks	Peacock, Susan
Ensyn Technologies	Gorsky, Garth
Enterprise Renfrew County, Pembroke	Fraser, Kim

ETM Industries Inc.	Sadler, Colleen Leclerc, JP
Excellence in Manufacturing Consortium	Diggins, Al
Forward Thinking Marketing & Media	Layman, Jennifer
Garrison Petawawa	Chubbs, Charlene Gagnon, Ed Malone, Diane Yutronkie, Edna
Giant Tiger, Pembroke	Hammill, Lou
Greater Arnprior Chamber of Commerce	Hughes, Murray
HGS Canada	Brunette, Danielle Woods, Leanne
Home Hardware, Deep River	Kreiger, Connie
Industrial Research Assistance Program/National Research Council	Hitchmough, Ken
Kenwood Corporate Centre	Nibourg, Mark
KI Pembroke LP	Lane, Harry
Lanark-North Leeds Enterprise Centre	James, Cindy
Literacy Link Eastern Ontario	Noyes, Doug
Lockwood's Rona Building Centre	Lockwood, Bob
Magellan Aerospace Haley Industries	Scott, Emily
Ministry of Agriculture Food and Rural Affairs	Moore, Bruce Lavictoire, Yves Ritchie, Brian
Ministry of Citizenship and Immigration, Ministry of Tourism, Culture and Sport	Goold, Carmen
Ministry of Community and Social Services	Treidlinger, Ben
Ministry of Economic Development and Trade	Kew, Hollee
Ministry of Small Business & Consumer Services	Haddon, Steve
Ministry of Tourism	Harris, Jonathan
Ministry of Advanced Education and Skills Development	Gapp, Sandra
Mississippi Mills Chamber of Commerce	Rudyk, Nathan
MJM Consulting	McLaren, Jay
Murray Bros. Lumber Company	Sullivan, Tom
Nylene Canada	Clouthier, Bob Guindon, Frank Steeds, Dave
Omya Canada Inc.	Sparks, Larry
ontrac Employment Resource Services	Hunt, Kathy Sovey, Linda Toop, Michelle
Ottawa Valley Glass	McHale, Shawn
Pacific Safety Products	Larson, Suzanne Rosien, Nancy
Pastway Planing	Pritchard, Arnie

APPENDIX A: COMMUNITY CONSULTATION PARTICIPANTS

Pembroke Downtown Development Commission	Picard, Chantal
Pembroke Mall	Brophy, Jayne
Pembroke MDF	McComb, Cindy
Pembroke Regional Hospital	Thomas, Danielle
Perth & District Chamber of Commerce	LeVatte, John
Perth & Smiths Falls District Hospital	Evans, Dave
Perth Downtown Committee	Hanscon, Heather
Perth Home Hardware	Grisham, Ruth
Pillar5Pharma	Graham, Anne
PMFRC Employment Services	Anderson, Louise
Renfrew & Area Chamber of Commerce	Logan, Tammy Villamere, Julie
Renfrew County Child Poverty Action Network	Smith, Lyn
Renfrew County Community Futures Development Corporation	Lemenchick, Kelley McKinnon, Diane
Renfrew County District School Board /OYAP	Clarke, Roger
Renfrew County District School Board Continuing Education	Friske, Melissa
Renfrew County United Way	Logan-McMeekin, Gail
Renfrew Industrial Commission	Lemkay, Dave
Renfrew Victoria Hospital	Hunter, Judy
Rose Integration	Bishop, Ryan Whitelaw, Graham
Scapa Tapes	Boldt, Andy
Scotiabank Pembroke	Becvar, John
Smiths Falls & District Chamber of Commerce	Lennox, Ashley Saumure, Chris
St. Jean Flooring	St. Jean, Michael
Staples Business Depot, Carleton Place	Arnott, Carolyn
Staples Business Depot, Pembroke	Rohrich, John
Stone Farms	Stone, Keanan
T.R. Leger School, Brockville	Dunn, Sandy

T.R. Leger School, Carleton Place	Cooke, Kim Lane, Daphne
The Delphi Group	Larry, Schruder
The Mall Laundromat	Juhasz, Richard
Times Fiber	Dunbar, Lillian MacMillan, Laurie
Town of Arnprior	Donaldson, Larry Smith, Robin
Town of Carleton Place	Ralph, Jasmin Sonnenburg, Ed
Town of Perth	Buchanan, Casey
Town of Petawawa	Phillips-McCann, Cyndy
Township of Greater Madawaska	Emon, Peter
Township of Killaloe, Hagarty & Richards	Marion, Kathy
Township of Laurentian Valley	Armstrong, Lauree Hodgkinson, George
Township of Madawaska Valley	Kelley, Craig Shulist, Dave
Training & Learning Centre	Sue Rupert
Triacta Power Technologies	Nichols, Karen
Tyerman & Daughters Inc.	Tyerman, Maggie
Upper Ottawa Valley Chamber of Commerce	Mackenzie, Lorraine McInall, Brian
Valley Artisans' Co-op	White, Leslie
Valley Automation	Fletcher, Todd
Valley Heartland Community Futures Development Corporation	Joynt, Bridget
Willis College - Smiths Falls	Lever, Shannon Russett, Lynn
Women's Shelter and Support Services	Sweeney, Leigh

APPENDIX B: INFORMATION SOURCES

Statistics Canada (2011 Census, 2011 National Household Survey , Canadian Business Patterns)
<<http://www.statcan.gc.ca/start-debut-eng.html>>

Algonquin College - Pembroke
<www.algonquincollege.com/pembrokenewcampus/index.htm>

Algonquin College - Perth
<http://www.algonquincollege.com/expansion/perth_campus.htm>

Algonquins of Pikwàkanagàn First Nation
<<http://algonquinsofpikwakanagan.com/index.php>>

County of Lanark Website
<www.county.lanark.on.ca>

County of Renfrew Website
<www.countyofrenfrew.on.ca>

The Upper Canada District School Board- Building for the Future
Pupil Accommodation Review

APPENDIX C: STATISTICS DATA DEFINITIONS

Business Pattern Data: The Canadian Business Patterns database provided by Statistics Canada identifies the number of business establishments (employers) within a Census Division (CD). The database also identifies the number of employers by detailed industry and for nine different employee size ranges. Canadian Business Pattern data is available every six months (June and December) with an approximate five week time lag for release.

Census Division (CD): A Census Division is a group of neighbouring municipalities joined together for the purposes of regional planning. Census Division is the general term for provincially legislated areas such as county and regional districts.

Census Metropolitan Area (CMA): A Census Metropolitan Area is a large urban area (known as urban core) together with adjacent urban and rural areas (known as urban and rural fringe) that have a high degree of social and economic integration with the urban core. A CMA has an urban core population of at least 100,000.

Economic Region (ER): Statistics Canada defines an Economic Region as a geographic unit generally composed of several Census Divisions within a province. Economic Regions enable reliable labour force estimates for areas that too small on their own, so they are grouped with a neighbouring region(s).

Employment: The employment numbers in the Base Profile refer to total employment, including full and part-time.

Employment Rate: Refers to the number of persons employed in the week (Sunday to Saturday) prior to Census Day (May 16, 2006), expressed as a percentage of the total population 15 years of age and over.

Economic Modeling Specialists Intl.: EMSI turns labour market data into useful information that helps organizations understand the connection between economies, people, and work. Using sound economic principles and good data, they build user-friendly services that help educational institutions, workforce planners, and regional developers (such as WIBs, EDOs, chambers, utilities) build a better workforce and improve the economic conditions in their regions.

Feed-in tariff: A Feed-in tariff, or FIT rate is the premium paid by a utility to its consumers for excess power generated by their solar, wind or alternative energy system. Feed-in tariffs are used by government as incentive for consumers to adopt newer, cleaner, renewable energy sources.

Industrial Sectors: The industrial sectors described in Indicator 1 and the 4-digit industries referred to in Indicators 2 and 4 refers to the classification into which all economic activity is placed. See NAICS below.

Industry (based on the 2002 North American Industry Classification System [NAICS]): General nature of the business carried out in the establishment where the person worked. The 2006 Census data on industry (based on the 2002 NAICS) can be compared with data from Canada's NAFTA partners (United States and Mexico).

Labour Force: Refers to persons who were either employed or unemployed during the week (Sunday to Saturday) prior to Census Day (May 16, 2006). In past censuses, this was called 'total labour force.'

Labour Market Challenges: A challenge refers to the possibility that there is an imbalance in demand and supply of labour [including skills, occupation and education]. A challenge by its very nature offers both a "problem" and an "opportunity". An unemployed or under-employed worker is a wasted resource and a problem. However, that worker's potential is also an opportunity to be deployed elsewhere.

Local: Local refers to the CD or CMA or the area relevant in the particular context.

Local Knowledge or Intelligence: Local knowledge refers to information, not impressions or perspectives without benefit of support, received from local business groups, educational institutions, economic development bodies, key sector informants, service providers and community leaders.

Median age: The median age is an age 'x', such that exactly one half of the population is older than 'x' and the other half is younger than 'x'.

NAICS: The North American Industry Classification System [NAICS] is the system used by the statistical agencies of Canada, the United States and Mexico to classify business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the economy.

National Household Survey (NHS): Starting in 2011, information previously collected by the mandatory long-form census questionnaire is collected as part of the voluntary National Household Survey (NHS). The NHS provides information about the demographic, social and economic characteristics of people living in Canada. The information from the survey provides data to support federal, provincial, territorial and local government planning and program delivery, as well as being used by various social service organizations and ethno-cultural organizations.

Readers should note that Statistics Canada states:

"Caution must be exercised when National Household Survey estimates are compared with estimates produced from the 2006 Census long form, especially when the analysis involves small geographies. Users are asked to use the NHS's main quality indicator, the global non-response rate, in assessing the quality of the NHS estimates and determining the extent to which the estimates can be compared with the estimates from the 2006 Census long form."

The LMG attempts to make observations based on close approximations of all available data. The information in this report should be used as part of an analysis from other sources and in collaborating with other like-minded organizations. For further information, see <http://goo.gl/wOYrIz>.

n.e.c.: Not Elsewhere Classified. An occupational qualifier occasionally used in the labels of major, minor and unit groups to refer to occupations not elsewhere classified.

NOC: The National Occupational Classification [NOC] was developed by Human Resources Skills Development Canada in collaboration with Statistics Canada to describe in a consistent framework the work done by Canadians.

Occupation (based on the National Occupational Classification for Statistics 2006 [NOC-S 2006]): Kind of work done by persons aged 15 and over. Occupation is based on the type of job the person holds and the description of his or her duties. The 2006 Census data on occupation are classified according to the National Occupational Classification for Statistics 2006 (NOC-S 2006). For comparisons with data from the 1991 and 1996 censuses, the variable Occupation (historical) should be used.

Taxfiler: Statistics Canada, Small Area and Administrative Data Division (Taxfiler) generates a wealth of socio-economic and demographic data derived from personal income tax returns submitted each year by Canadians. Data is usually available about 18 months after the year in question.

Source: Statistics Canada 2006 Census Dictionary and A Local Board Manual: Mobilizing Data as Evidence for Local Labour Market Planning, Wikipedia

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Document photos:

Pages 5, 32: The Algonquins of Pikwàkanagàn First Nation

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A Skilled Workforce Contributing to a Prosperous Ontario



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