

Winter/Spring 2018

LABOUR MARKET PLANNING REPORT



The
Labour Market
of Renfrew & Lanark
Group

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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 population of 171,092. Historically, both counties have had similar economies that were very active 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, however the introduction of Ontario's new fairer workplace legislation (Bill 148) has caused some concern among local employers about escalating operational costs, particularly in non-unionized environments.

Counties. The information and data collected from the Employer One Survey are reflected throughout this report in the form of "local intelligence". To obtain a detailed copy of the Employer One Survey Results or to participate in this year's survey, please visit our website. The results

From September 2016 through to January 2017, 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. 102 employers completed the survey from every range of industry within Renfrew and Lanark



EXECUTIVE SUMMARY Continued...

from the 2017-2018 Employer One survey will be made available in March 2018.

www.renfrewlanark.com

For the fifth 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.

In 2016-2017, 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.

The LMG group has facilitated over 25 Labour Market Information workshops this year for youth enrolled in Youth Job Connection, Indigenous workplace, and High School career discovery programs. It is critical that regional youth get the Labour Market information they need to make informed and educated decisions when investing in post-secondary training and apprenticeship programs.

For more information or to schedule a presentation, please contact us at renfrewlanark@gmail.com.

Significant Changes

Within the region, there are currently 44,222 jobs in Renfrew County and 21,820 jobs in Lanark County. The local economy's projected job growth from 2015 to 2016 was at 0.5% for Renfrew County and 2.3% 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 2016 Canadian census results are complete and in

the process of being released. Included in this report are the 2016 data results for Age Characteristics, Median Age, Population Change, Aboriginal Population data and Educational Attainment.

According to the 2016 Census results, Renfrew County experienced a slight population growth of 1.1%. Lanark County experienced a population growth of 4.6%, mirroring that of the province. While further research is required, the difference in growth between Renfrew County and the province may be attributable to fewer immigrants settling in rural communities.

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,

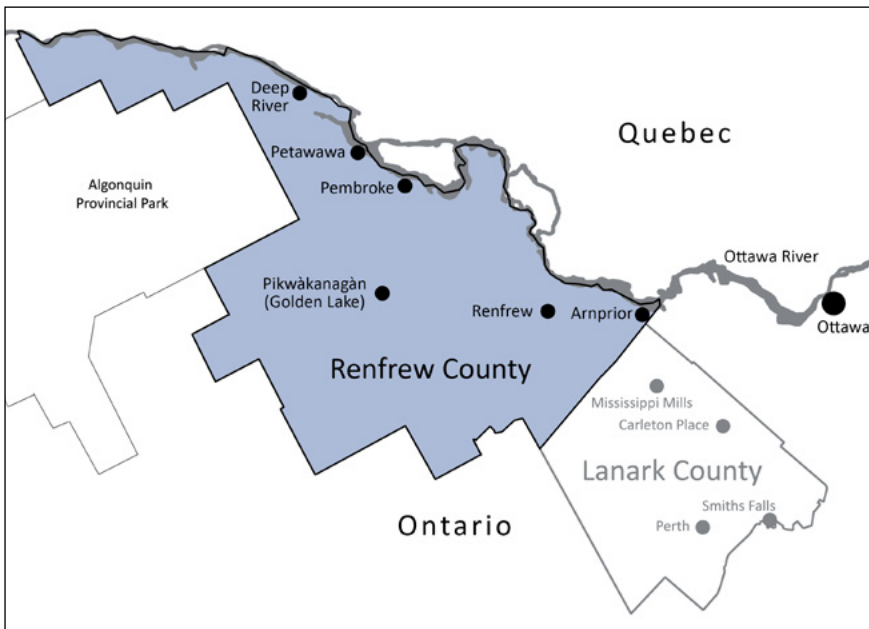


Matt LeMay, Coordinator
The Labour Market Group of Renfrew & Lanark



DEMOGRAPHIC OVERVIEW

RENFREW COUNTY

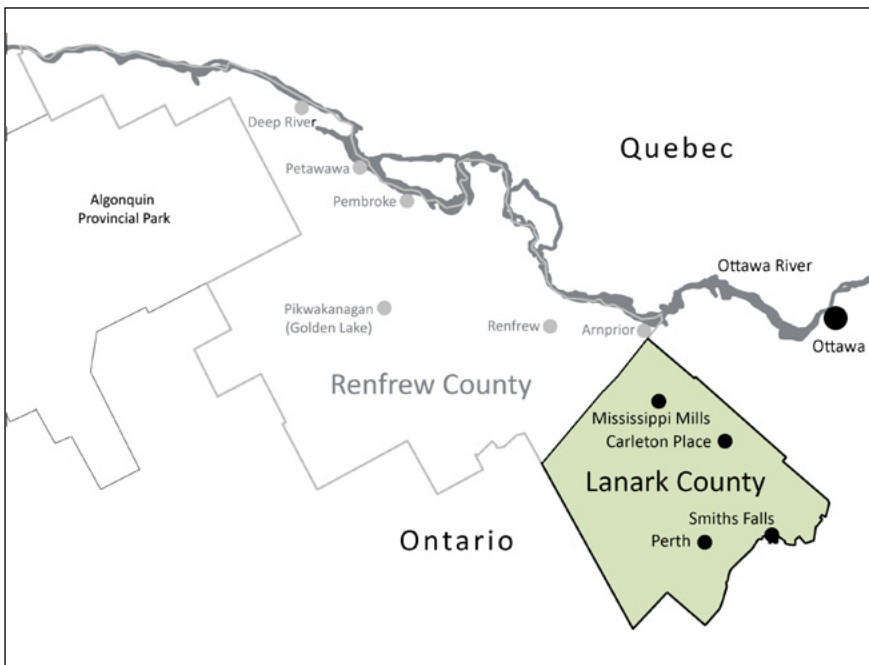


Renfrew County Census Division

Demographic Profile

Renfrew County has a total population of 102,394. 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, 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

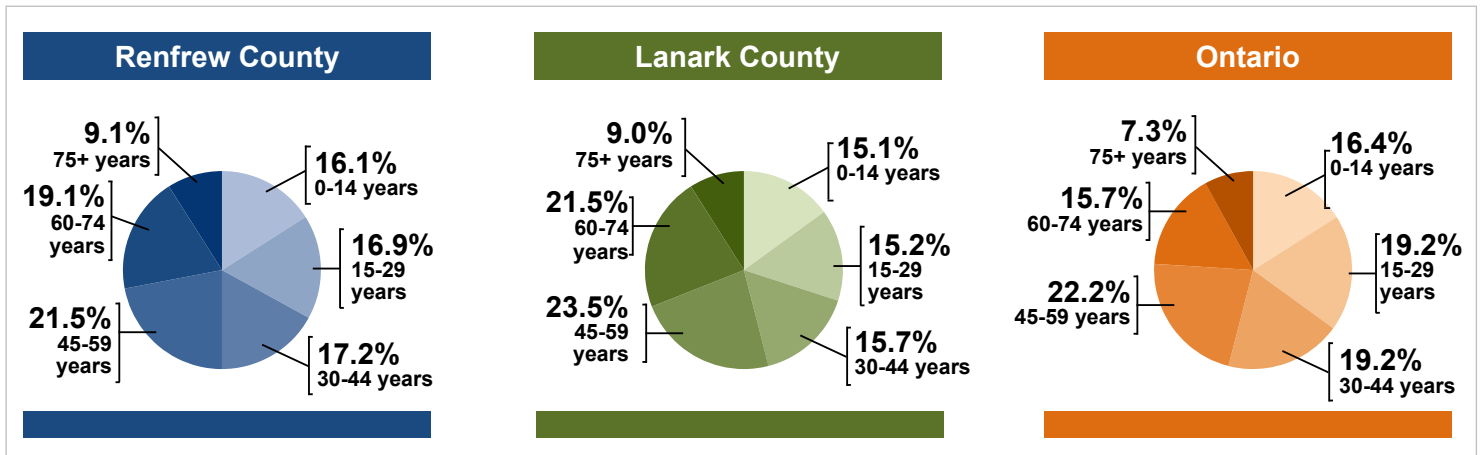
Demographic Profile

Lanark County has a total population of 68,698. 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 2016



Source: Statistics Canada 2016 Census

In Renfrew County, 49.8% of the population is 45 years and older, and in Lanark County, 54.0% of the population is 45 years and older. Whereas in Ontario, only 45.2% 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, 15.2%, Renfrew has a slightly higher percentage of youth, 16.9%, and Ontario has the largest percentage of youth, 19.2%.

Local Intelligence – It is predicted that Renfrew and Lanark Counties’ relatively small youth populations will be unable to fulfill workforce demands of the future. As a result, employers may be required to recruit skilled workers from outside the region, hire older, laid-off or retired workers to meet workforce demands. The development and implementation of a regional workforce development strategy that better aligns government, education, and industry would help ensure our local workforce matches our present and future economic needs.

According to the **2016/2017 Employer One Survey Results**, 15.6% of the surveyed workforce are under age 25, while 16.7% 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 2016/2017 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 2011 and 2016.

The median age of citizens in Renfrew County is 44.8, and in Lanark County, it is 48.2. Both counties median age is older than the provincial median of 41.3 years of age. Lanark County experienced the most significant change from 2011 to 2016 with an increase in the median age by 2.0 years.

Region	Median Age 2011	Median Age 2016	Difference in Years
Renfrew County	43.9	44.8	0.9
Lanark County	46.2	48.2	2.0
Ontario	40.4	41.3	0.9

Source: Statistics Canada 2011 and 2016 Census

Statistics Canada began 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 2011-2016

This table compares the total population change in Renfrew County, Lanark County and the province of Ontario between 2011 and 2016.

Between 2011 and 2016, Renfrew County experienced a slight population growth of 1.1%. Lanark County experienced a population growth of 4.6%, mirroring that of the province. While further research is required, the difference in growth between Renfrew County and the province may be attributable to fewer immigrants settling in rural communities. Of note, Renfrew County's largest municipality, the Town of Petawawa, had robust growth of 7.0%, driven by the expansion of Garrison Petawawa.

Census Division	Population 2011	Population 2016	Population Change (%)
Renfrew County 3547	101,326	102,394	1.1%
Lanark County 3509	65,667	68,698	4.6%
Ontario	12,851,821	13,448,494	4.6%

Source: Statistics Canada 2011 and 2016 Census

ABORIGINAL IDENTITY POPULATION 2016

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

The Aboriginal population of Renfrew County grew 0.8% from 2011 to 2016. In Lanark County, there was 0.1% growth and in Ontario, 0.4% growth during the same period.

	Renfrew County	Lanark County	Ontario
Percentage of total population	8.3%	3.8%	2.8%

Source: Statistics Canada 2016 Census

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.

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.

The First Nation has been developing a Land Code since 2013. This is separate from the “Land Claim” process. The Land Code gives the opportunity to get out of the Indian Act with regards to how lands are managed on the First Nation. It will outline what authorities will be responsible for: developing lands laws, environmental protection and an updated internal lands registry system.

A labour market information session for unemployed Indigenous youth was held at the Makwa Centre in Pikwàkanagàn (September 2017). 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 postsecondary studies.

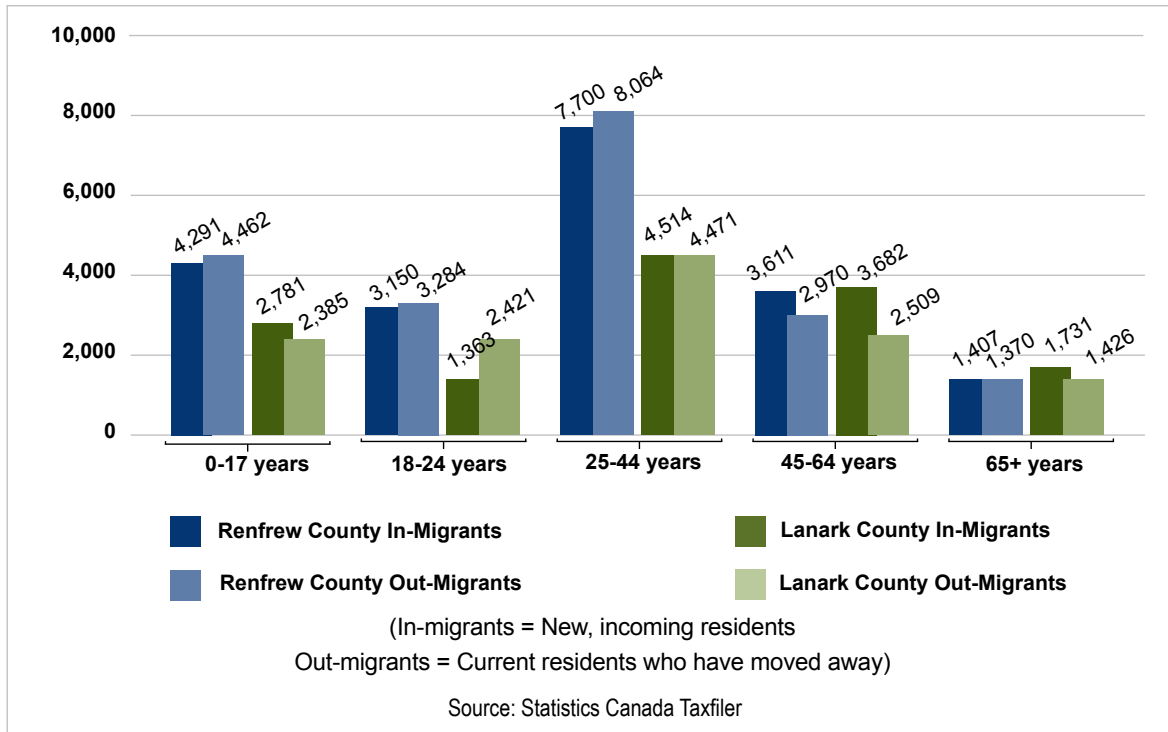


MIGRATION CHARACTERISTICS

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 2010 and 2015.*

Migration Characteristics by Age Category 2010-2015



Total Net-Migrants in Renfrew County from 2010-2015: 9

Total Net-Migrants in Lanark County from 2010-2015: 859

(Net migrants = the difference between the in-migrants and the out-migrants, or the total movement of people in or out of the region)

Both Renfrew and Lanark Counties saw significant migration in all age groups between 2010 and 2015, 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.

Overall, Renfrew County experienced an additional 9 residents between 2010 and 2015. The greatest net increase was among the 45-64 age group (641 in-migrants), followed by the 65+ age group (37 in-migrants). There was a net out-migration of 669 young people in the 0-44 age groups. 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 need to be considered.

Overall, Lanark County experienced an additional 859 residents between 2010 and 2015. The greatest net increase was among the 45-64 age group (1,173 in-migrants), followed by the 0-17 age group (396 in-migrants). In Lanark County, the only net out-migration from the region was among the 18-24 age group (1,058 out-migrants) and was 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.

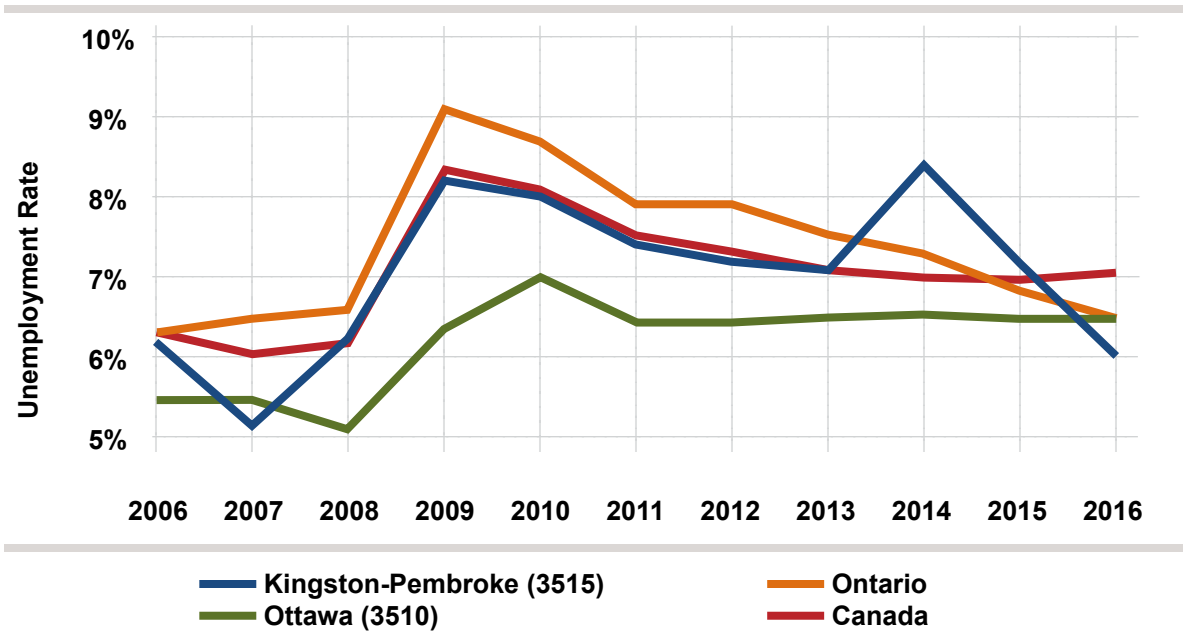
Local Intelligence – The fastest growing segment of the Canadian population is New Canadians. Economists and government experts have indicated that the region could benefit tremendously from the establishment of settlement services to support newcomers.

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

HISTORICAL LABOUR FORCE CHARACTERISTICS

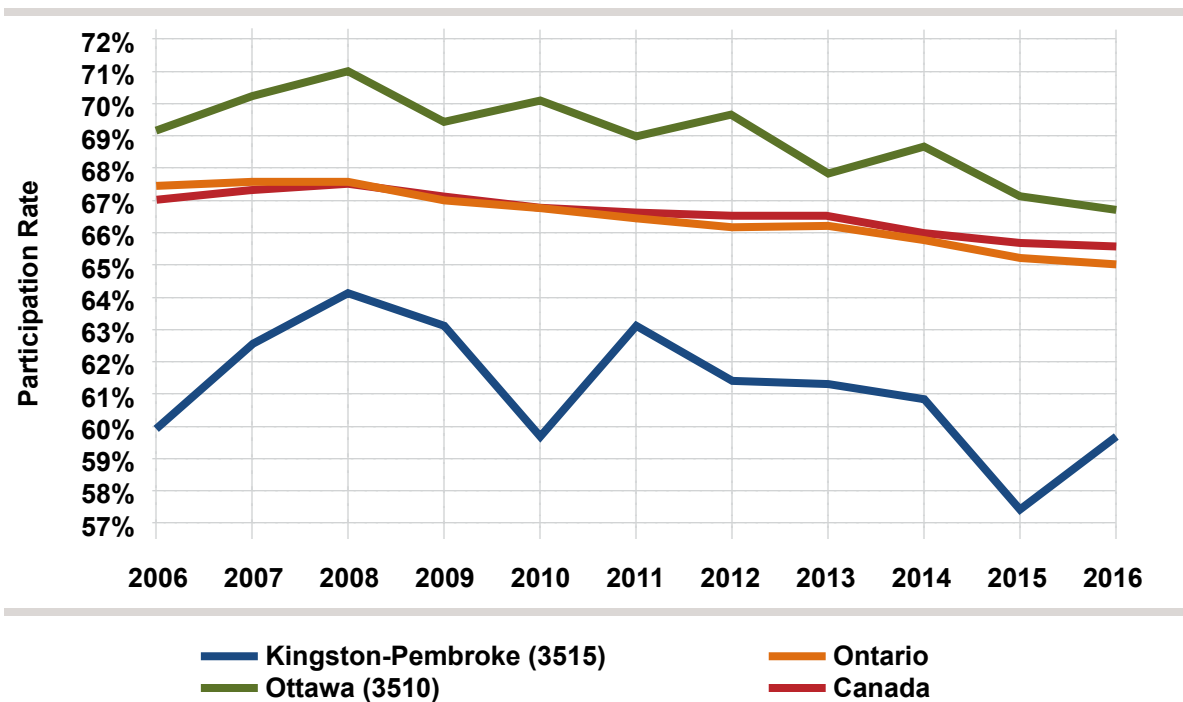
The following graphs detail the unemployment rates and participation rates in Economic Regions 3510 (includes Lanark County), 3515 (includes Renfrew County), Ontario and Canada from 2006-2016.

UNEMPLOYMENT RATE



This 10-year history of the unemployment rate demonstrates an increase in each region around the time of the 2008 economic downturn. The unemployment rate is represented as the percentage of unemployed workers in the total labor force.

PARTICIPATION RATE



The 10-year history of the participation rate shows a similar slow decrease for Ontario and Canada. The Kingston-Pembroke and Ottawa Economic Regions show an overall decrease, but with Ottawa maintaining a much higher participation rate and Kingston-Pembroke a much lower participation rate than the province or country.

LOCAL EDUCATION SUMMARY

Local Intelligence – As **Algonquin College** celebrates its 50th anniversary, the Waterfront Campus in Pembroke has broken through the 1,000 full-time student enrollment mark for the first time in its history. The campus successfully launched three new programs in the fall of 2017 including Urban Forestry-Arboriculture, Applied Nuclear Science and Radiation Safety, and Action Sports Park Development. The enrollment growth at the campus has also led to significant economic spin-offs for the city of Pembroke, including the opening of three privately owned and operated student residences. These residences are providing accommodations for more than 170 out of town students.



Action Sports Park Development Program

The Perth Campus of Algonquin College is home to just over 300 students in 10 programs. Most programs are delivered in a 45-week or less format that allows students to graduate sooner and save on living expenses by being in school a shorter amount of time.



Programs in Police Foundations, Office Administration Executive, Early Childhood Education, Masonry-Heritage and Traditional and Carpentry and Renovation Technician all follow the 45 week model and Office Administration General and Personal Support Worker can be done in 30 and 31 weeks respectively. Perth Campus continues to house the Heritage Institute and in addition to aforementioned masonry program also offers a diploma in Heritage Carpentry and Joinery and Continuing Education courses in Timber-Framing, Log Building and Blacksmithing to mention just a few. The campus is expanding its partnerships in the field of built heritage as well as high performance low-energy and sustainable design-build construction. In fact, Perth Campus opened a new Building Innovation Research Lab that serves as a classroom, applied research facility and event space for the community.

Residential Living Laboratory at Perth Campus

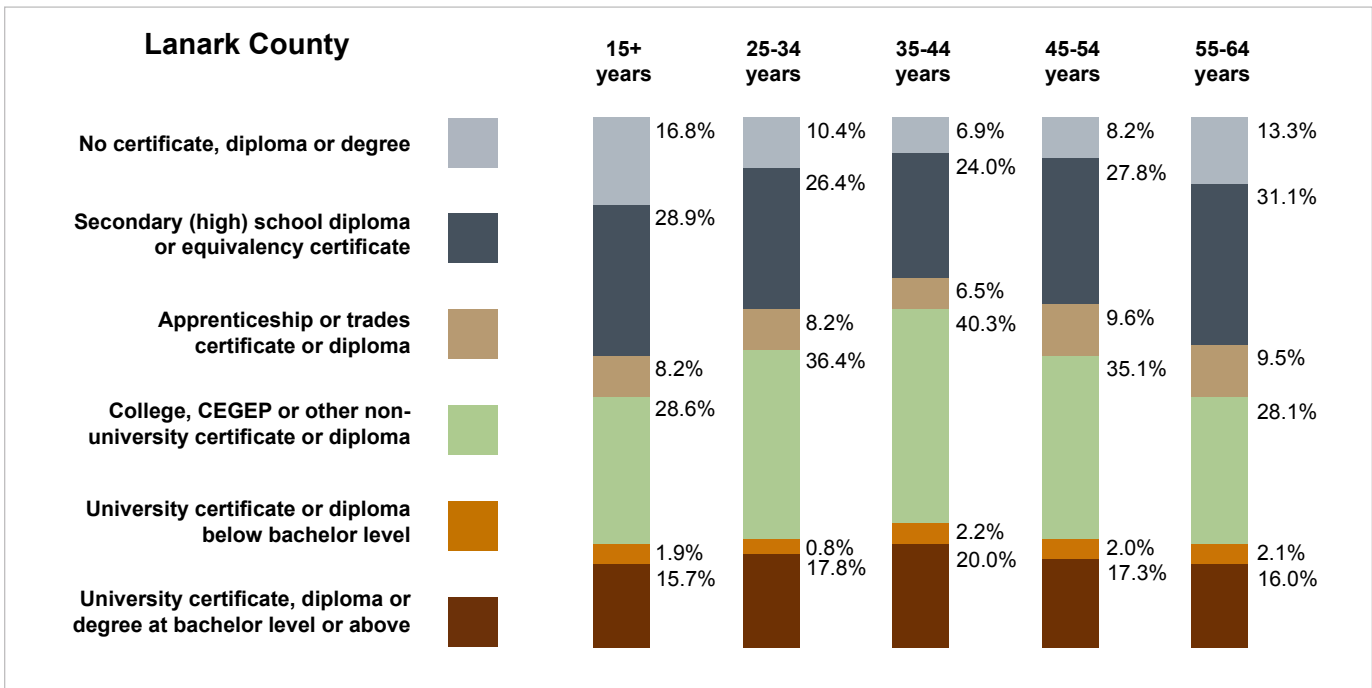
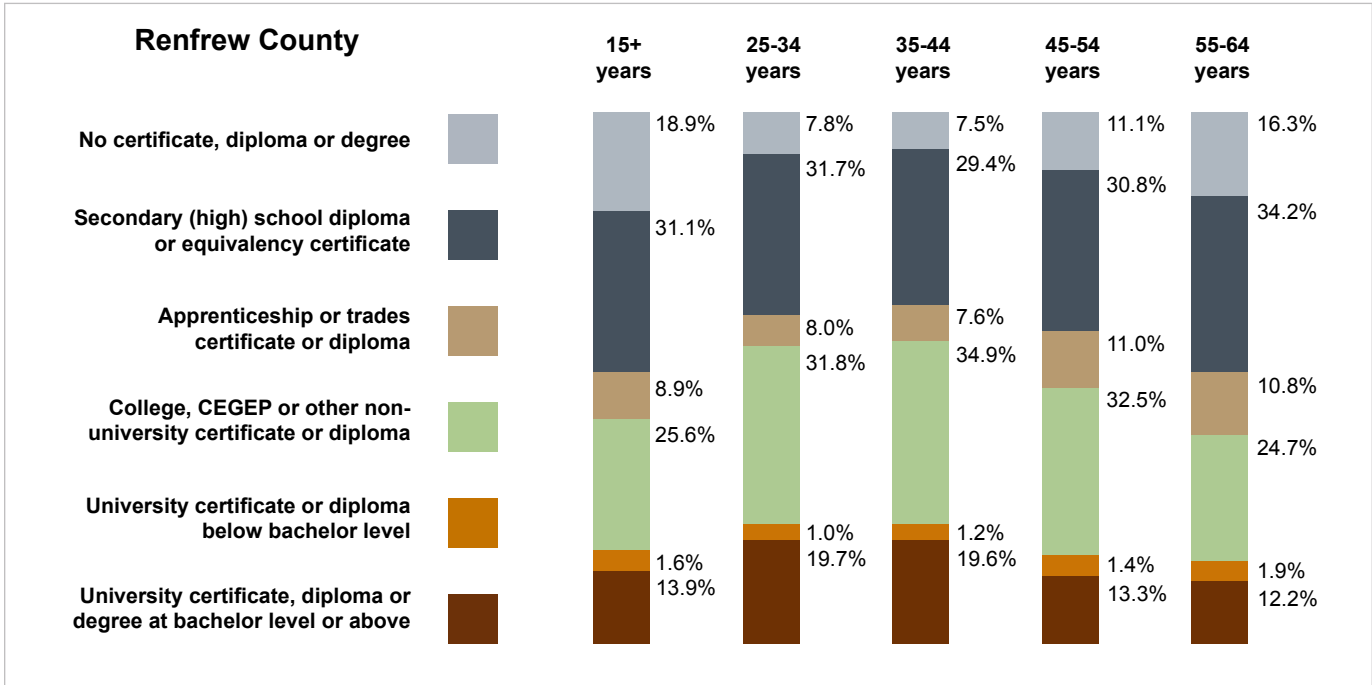
Willis College has campuses in Arnprior, Smiths Falls and Ottawa. Willis is one of the oldest career colleges in the area providing fast-track diplomas and certificates in employer-driven skills training for in-demand jobs in the fields of business, health and technology. Most of the diploma programs 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. Willis College will soon launch an Open Source Database Advanced Diploma program aimed at filling an existing skills gap within the IT sector.

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.

LOCAL EDUCATIONAL ATTAINMENT SUMMARY

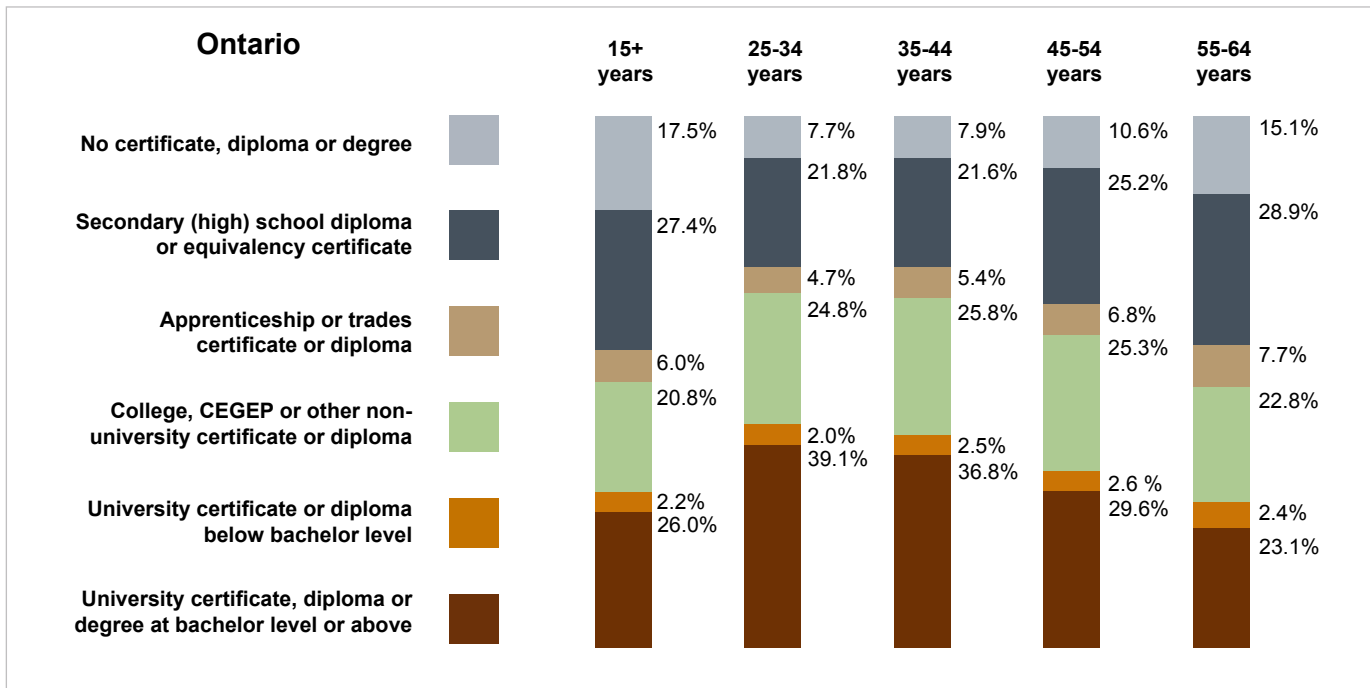
The charts below show the level of education attained by different age groups in Renfrew and Lanark Counties in comparison to the Province of Ontario in 2016.

Educational Attainment by Age Cohort, 2016



Source: Statistics Canada, 2016 Census

Educational Attainment by Age Cohort, 2016



Source: Statistics Canada, 2016 Census

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 every age group in comparison to the province.

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 – The city of Pembroke and Laurentian Valley Township have partnered to submit an application for provincial funding to support a public transit bus service in the two municipalities. This would be very beneficial for job seekers and students who lack access to transportation to get to and from work and school. The town of Petawawa is also applying for a grant for a similar service within its boundaries. The funding is being made available through the Ministry of Transportation’s new Community Transportation Grant program. Transportation has always been a major labour market issue in rural regions, including Renfrew and Lanark Counties.



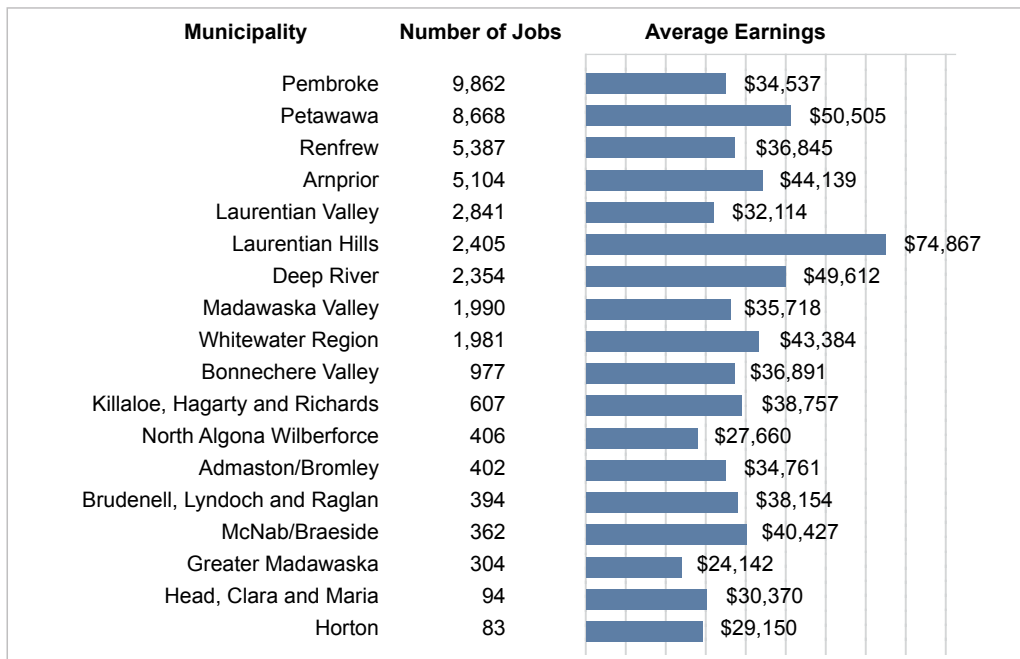
ECONOMIC OVERVIEW

In a bid to provide current and accurate labour market information, the LMG uses 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

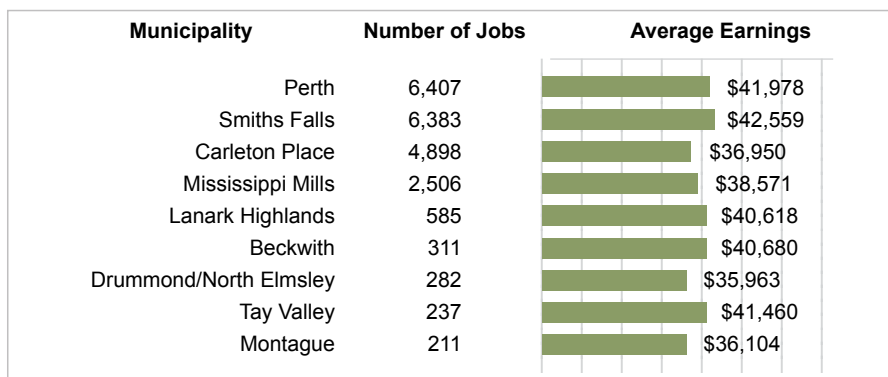
The following two graphs represent the number of jobs per municipality in Renfrew and Lanark Counties, as well as the average earnings.

Employment by Municipality - Renfrew County 2016



Source: EMSI Analyst projection, August 2017

Employment by Municipality - Lanark County 2016



Source: EMSI Analyst projection, August 2017

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 differences in Renfrew County are based on the presence of large, federally funded organizations such as Garrison Petawawa and Canadian Nuclear Laboratories. Garrison Petawawa is located in the Town of Petawawa, and Canadian Nuclear Laboratories is located in Chalk River. These employers have given a significant boost to the average earnings in these regions.

HIGHEST PAYING INDUSTRIES - RENFREW COUNTY

NAICS	Industry	Average Earnings 2016
54	Professional, scientific and technical services	\$75,825
22	Utilities	\$75,823
55	Management of companies and enterprises	\$64,529
91	Public administration	\$55,564
31-33	Manufacturing	\$52,637
61	Educational services	\$46,262
41	Wholesale trade	\$45,351
23	Construction	\$44,980
52	Finance and insurance	\$37,824
62	Health care and social assistance	\$36,949

Source: EMSI Analyst projection, August 2017

The industries in Renfrew County with the greatest average earnings in 2016 were Professional, scientific and technical services, Utilities, and Management of companies and enterprises.

HIGHEST PAYING INDUSTRIES - LANARK COUNTY

NAICS	Industry	Average Earnings 2016
22	Utilities	\$81,178
21	Mining, quarrying, and oil and gas extraction	\$76,818
91	Public administration	\$64,241
61	Educational services	\$61,028
55	Management of companies and enterprises	\$58,058
54	Professional, scientific and technical services	\$49,279
51	Information and cultural industries	\$48,056
31-33	Manufacturing	\$47,626
23	Construction	\$46,601
48-49	Transportation and warehousing	\$44,353

Source: EMSI Analyst projection, August 2017

The industries in Lanark County with the greatest average earnings in 2016 were Utilities, Mining, quarrying, and oil and gas extraction, and Public administration.

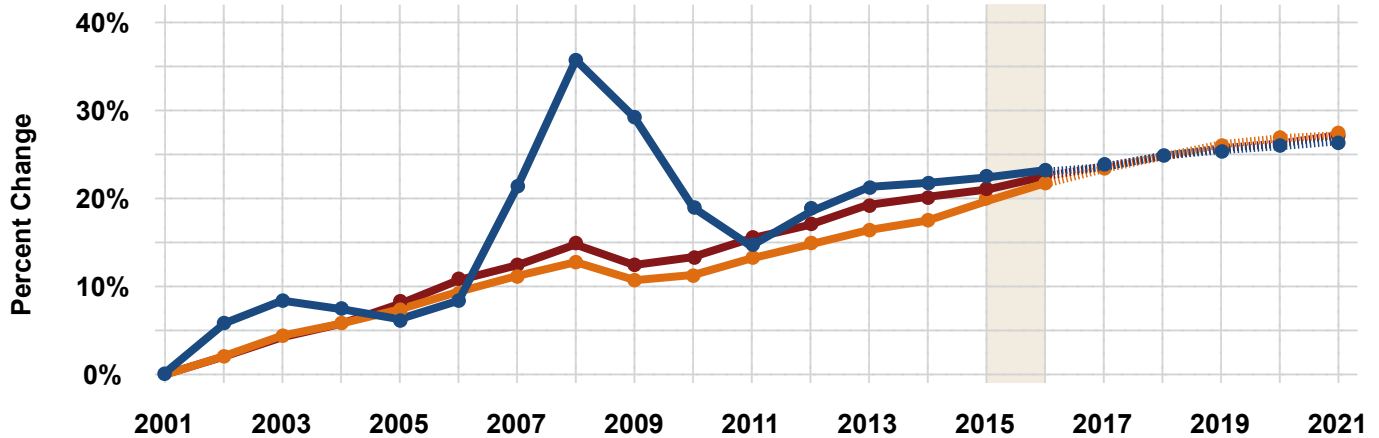
Local Intelligence – Despite deindustrialization being a trend within both counties, manufacturing is still a major source of employment and an important contributor to the region’s economy. According to the EMSI analyst tool, there are over 4,000 manufacturing jobs in Renfrew County and 2,650 in Lanark County. Business Development Bank of Canada has indicated that finding skilled talent is the biggest challenge facing all manufactures across Ontario and all of Canada.

A manufacturer's forum held in Renfrew County in October 2017 resulted in several initiatives to support local manufacturers in securing a non-skilled and skilled workforce.

According to the Statistics Canada recent release of 2015 median household incomes, Petawawa is in second place in Ontario with a median household income of \$86,000. Carleton Place is close behind with a median household income of \$83,600.



REGIONAL TRENDS - RENFREW COUNTY



Region	2015 Jobs	2016 Jobs	% Change
● Renfrew County	44,222	44,222	0.5%
● Ontario	6,180,670	6,302,151	2.0%
● Canada	16,138,520	16,387,120	0.9%

Total Jobs in Renfrew County in 2016:

44,222

Average Earnings in 2016:
86% of National Average

\$42,385

Renfrew County has experienced a rate of job growth of 0.5%, which is below the Provincial and National averages. Although the average income of Renfrew County (\$44,222) is only 86% of the National Canadian average, it is projected that job growth will continue through 2021.

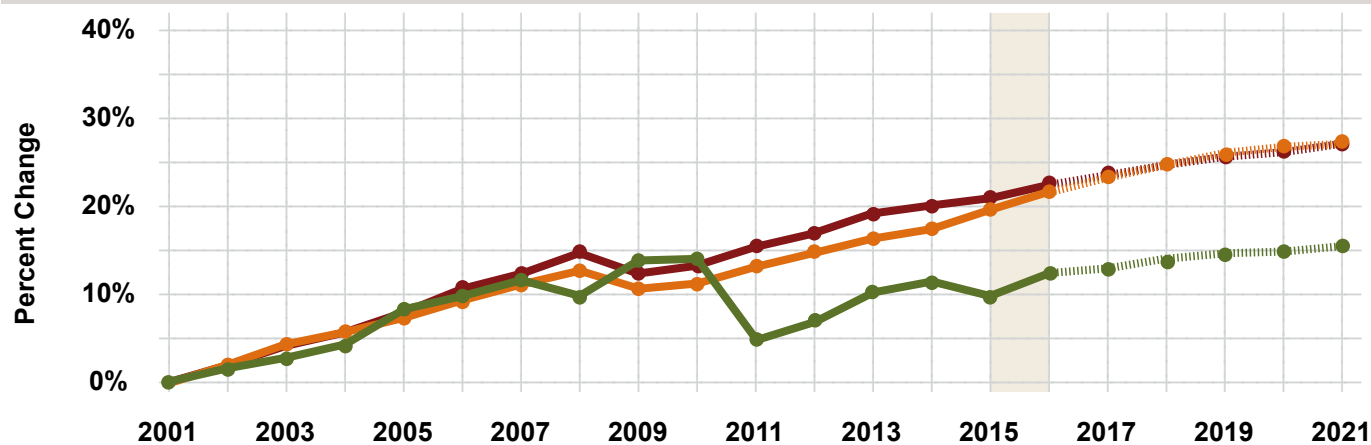
JOBS BY INDUSTRY - RENFREW COUNTY

NAICS	Industry	2016 Jobs
91	Public administration	8,022
62	Health care and social assistance	5,682
44-45	Retail trade	5,640
31-33	Manufacturing	3,974
72	Accommodation and food services	3,367
54	Professional, scientific and technical services	3,235
61	Educational services	2,893
23	Construction	1,929
56	Administrative and support, waste management and remediation services	1,817
81	Other services (except public administration)	946

Source: EMSI Analyst projection, August 2017

Local Intelligence – Despite offering competitive salaries and incentive packages, some regional manufacturers have indicated that they are finding it difficult to recruit and retain qualified candidates to fill many entry-level positions. There is an acute shortage of Stationary Engineers, Industrial Electricians and Millwrights within the region. In response to this trend, The LMG received additional funding from the Ministry of Advanced Education and Skills Development to hold a one-day facilitated manufacturing forum. The forum identified specific actions that could be taken to assist with the attraction and retention of skilled workers within the local manufacturing sector. The forum resulted in a community action plan and a report that outlined the extent of the issue by providing critical labour market data to the manufacturing sector.

REGIONAL TRENDS - LANARK COUNTY



Region	2015 Jobs	2016 Jobs	% Change
Lanark County	21,332	21,820	2.3%
Ontario	6,180,670	6,302,151	2.0%
Canada	16,138,520	16,387,120	0.9%

Total Jobs in Lanark County in 2016:

21,820

Average Earnings in 2016:
82% of National Average

\$40,433

Job growth in Lanark County increased by 2.3%, which is above the Provincial and National averages. Although the average income of Lanark County (\$40,433) 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	2016 Jobs
62	Health care and social assistance	4,026
44-45	Retail trade	3,783
31-33	Manufacturing	2,613
72	Accommodation and food services	1,816
61	Educational services	1,395
23	Construction	1,294
91	Public administration	1,140
48-49	Transportation and warehousing	876
54	Professional, scientific and technical services	746
56	Administrative and support, waste management and remediation services	719

Source: EMSI Analyst projection, August 2017

Local Intelligence – According to the **2016/2017 Employer One Survey Results**, local employers have suggested the top three competencies for future employees are Work ethic, dedication, dependability, Self-motivated/ability to work with little to no supervision and Teamwork/interpersonal.

Download the 2016/2017 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 2017. 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 2017**

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*	5,243	66.6%	4,220	68.3%	1,517,318	69.1%
	1 - 4	1,343	17.0%	1,057	17.7%	264,317	17.9%
	5 - 9	611	7.8%	411	6.7%	81,850	5.5%
	10 - 19	342	4.3%	275	4.5%	53,470	3.5%
	20-49	213	2.7%	142	2.3%	36,046	2.4%
	50-99	71	0.9%	40	0.6%	12,705	0.9%
	Subtotal		7,823	99.3%	6,145	99.4%	1,507,319
Large	100-199	37	0.5%	22	0.4%	5,765	0.4%
	200-499	9	0.1%	11	0.2%	3,010	0.2%
	500+	9	0.1%	1	0.0%	1,224	0.1%
	Subtotal	55	0.7%	34	0.6%	9,999	0.7%
Total		7,878	100%	6,179	100%	1,517,318	100%

Source: Canadian Business Patterns

In June 2017, Renfrew County had a total of 7,878 employers, and Lanark County had 6,179. 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 **2016/2017 Employer One Survey Results**, more than half of the anticipated staff changes over the following year will occur in Entry Level positions. The greatest reasons for anticipated job openings over the next 12 months are Expansion or Restructuring, 82.9%, and Retirements, 37.1%.

Download the 2016/2017 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 2017

NAICS	Renfrew Distribution %	Ontario Distribution %	Distribution Difference
112 - Animal production and aquaculture	5.3%	1.4%	3.9%
111 - Crop production	3.7%	1.8%	1.9%
238 - Specialty trade contractors	7.6%	6.1%	1.5%
811 - Repair and maintenance	3.5%	2.0%	1.5%
113 - Forestry and logging	1.5%	0.1%	1.4%
721 - Accommodation services	1.7%	0.4%	1.3%
523 - Securities, commodity contracts, and other financial investment and related activities	3.0%	4.6%	-1.6%
484 - Truck transportation	1.5%	3.7%	-2.2%
531 - Real estate	16.2%	18.6%	-2.4%
541 - Professional, scientific and technical services	7.2%	14.4%	-7.1%

Source: Canadian Business Patterns

Renfrew County has a higher percentage of employers in Animal production and aquaculture, Crop production and Specialty trade contractors 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 – Despite offering competitive salaries, many local sawmills and forestry operations are having a difficult time recruiting skilled workers that are willing to engage in physically demanding labour. As a result, many operations are investing in more automated systems that will require employees with a more technically based skill set.

Distribution of Employers Lanark County June 2017

NAICS	Lanark Distribution %	Ontario Distribution %	Distribution Difference
238 - Specialty trade contractors	8.9%	6.1%	2.9%
112 - Animal production and aquaculture	3.3%	1.4%	1.9%
111 - Crop production	3.1%	1.8%	1.3%
523 - Securities, commodity contracts, and other financial investment and related activities	3.2%	4.6%	-1.4%
541 - Professional, scientific and technical services	12.6%	14.4%	-1.8%
484 - Truck transportation	1.4%	3.7%	-2.3%
531 - Real estate	15.8%	18.6%	-2.8%

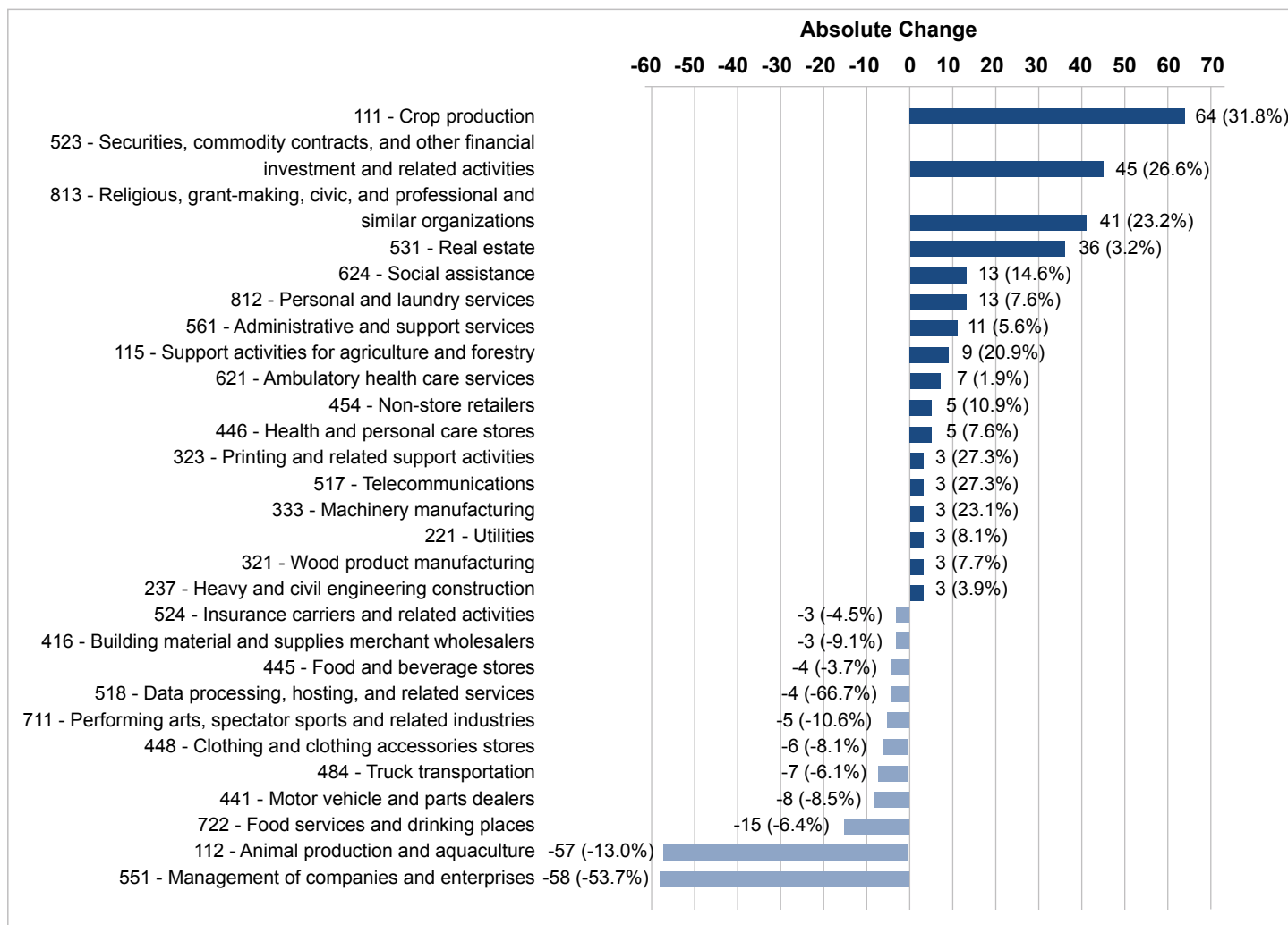
Source: Canadian Business Patterns

Lanark County has a higher percentage of Specialty trade contractors, Animal production and aquaculture, and Crop production 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 June 2016 and June 2017, categorized by industry. Figures show industries where there was an increase or decrease of three or more employers.

**Change in Number of Employers - Renfrew County
June 2016 to June 2017**

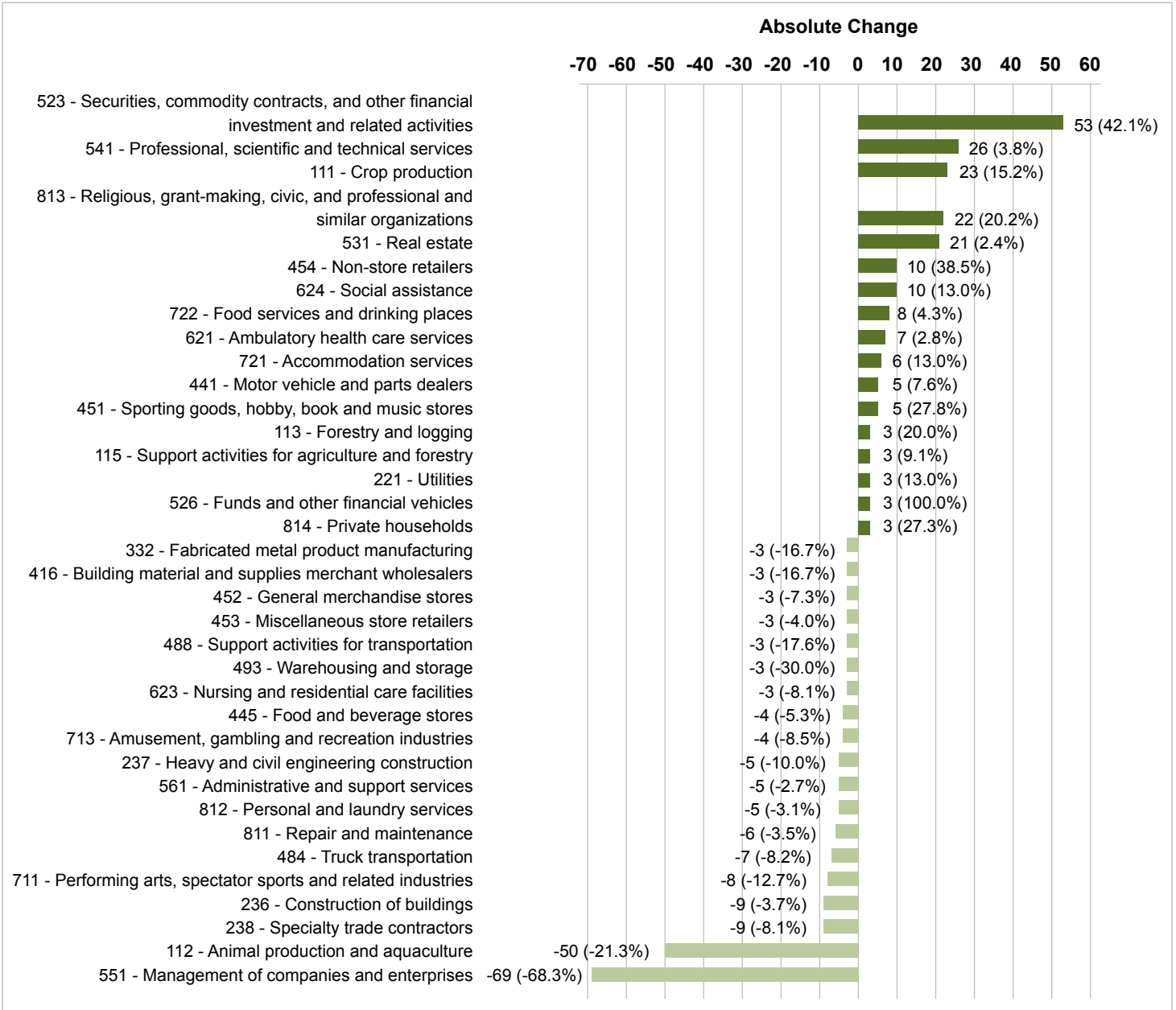


Source: Canadian Business Patterns

The industries in Renfrew County with the greatest absolute increases in the number of employers from 2016 to 2017 were Crop production, Securities, commodity contracts, and other financial investment and related activities and Religious, grant-making, civic, and professional and similar organizations.

The industries with the greatest absolute decreases in the number of employers were Management of companies and enterprises, Animal production and aquaculture and Food services and drinking places (bars).

**Change in Number of Employers - Lanark County
June 2016 to June 2017**



Source: Canadian Business Patterns

The industries in Lanark County with the greatest absolute increases in the number of employers from 2016 to 2017 were Securities, commodity contracts, and other financial investment and related activities, Professional, scientific and technical services, and Crop production. The industries with the greatest absolute decreases in the number of employers were Management of companies and enterprises, Animal production and aquaculture and Specialty trade contractors.

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 2016 to 2017.

Fastest Growing Industries - Renfrew County 2016-17

Industry	2016 Jobs	2017 Jobs	Change in Jobs	Earnings per Worker
Professional, scientific and technical services	3,235	3,329	94	\$75,825
Manufacturing	3,974	4,042	68	\$52,637
Health care and social assistance	5,682	5,743	61	\$36,949
Accommodation and food services	3,367	3,390	23	\$15,302
Retail trade	5,640	5,656	16	\$23,252
Management of companies and enterprises	290	305	15	\$64,529
Administrative and support, waste management and remediation services	1,817	1,826	9	\$26,705
Public administration	8,022	8,031	9	\$55,564
Real estate and rental and leasing	500	508	8	\$36,233
Arts, entertainment and recreation	576	583	7	\$21,517

Source: EMSI Analyst projection, August 2017

Fastest Growing Industries - Lanark County 2016-17

Industry	2016 Jobs	2017 Jobs	Change in Jobs	Earnings per Worker
Manufacturing	2,613	2,672	59	\$47,626
Health care and social assistance	4,026	4,072	46	\$42,293
Retail trade	3,783	3,809	26	\$26,343
Educational services	1,395	1,420	25	\$61,028
Professional, scientific and technical services	746	755	9	\$49,279
Arts, entertainment and recreation	550	558	8	\$33,513
Information and cultural industries	235	241	6	\$48,056
Utilities	154	157	3	\$81,178
Accommodation and food services	1,816	1,819	3	\$14,866
Administrative and support, waste management and remediation services	719	721	2	\$28,976

Source: EMSI Analyst projection, August 2017

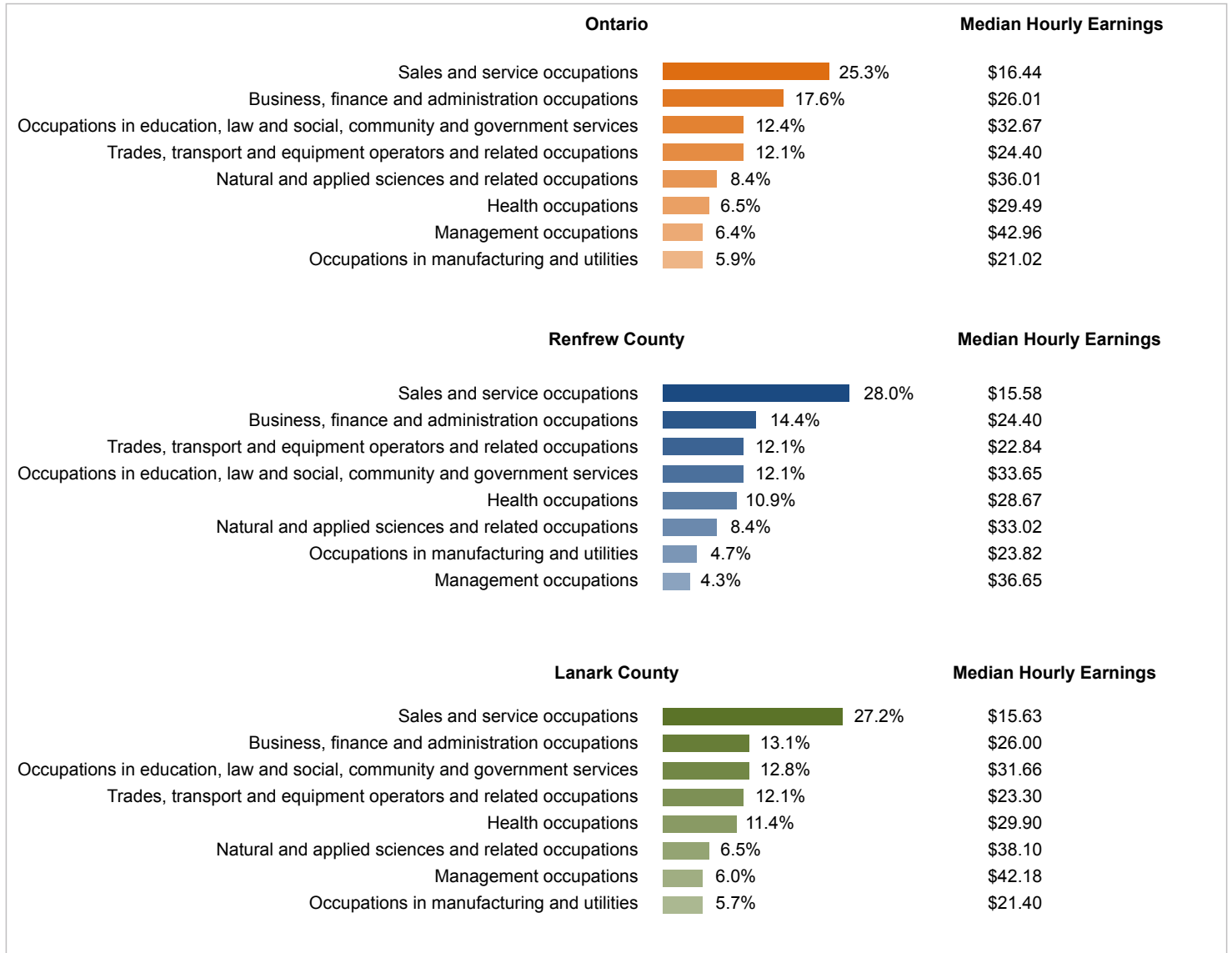
The fastest growing industries in Renfrew County are Professional, scientific and technical services, Manufacturing and Health care and social assistance. In Lanark County, the fastest growing industries are Manufacturing, Health care and social assistance, and Retail trade.

Local Intelligence – According to the **2016/2017 Employer One Survey Results**, the minimum level of education that staff requires upon hire are High School Diploma, 46.3%, College Diploma, 25.3%, and Work Experience and No Certification, 24.2%. These three categories make up an overwhelming majority of 95.8%. The remaining three categories of Apprenticeship/Trade Certificate, Undergraduate Degree and Professional Accreditation or Graduate Degree total only 4.2%. This suggests there are excellent opportunities for entry-level workers to join the local workforce.

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 2017



Source: EMSI Analyst projection, August 2017

In both Renfrew and Lanark Counties, as well as Ontario, the highest percentage of residents are employed in Sales and service occupations; 28.0% in Renfrew County and 27.2% in Lanark County, and 25.3% in Ontario as a whole.

Local Intelligence – Roseburg Forest Products of Springfield, Oregon plans to purchase Pembroke MDF, Inc. a medium density fiberboard and moulding production facility by spring 2018. Roseburgs' senior vice president of industrial products and national accounts, Mark Avery, expressed enthusiasm over the “untapped potential” of the Pembroke plant and its employees.

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 2017

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	1100	47	12	4	1	1	1	0	0	1166	16.2%
238 - Specialty trade contractors	326	139	50	23	9	1	0	0	0	548	7.6%
541 - Professional, scientific and technical services	359	110	28	18	5	1	0	0	2	523	7.2%
621 - Ambulatory health care services	200	113	43	17	8	1	3	0	0	385	5.3%
112 - Animal production and aquaculture	337	36	5	1	1	0	0	0	0	380	5.3%
236 - Construction of buildings	163	74	28	9	2	0	1	0	0	277	3.8%
111 - Crop production	235	21	6	2	0	1	0	0	0	265	3.7%
811 - Repair and maintenance	153	67	23	6	3	1	0	0	0	253	3.5%
722 - Food services and drinking places	68	23	43	39	38	10	0	0	0	221	3.1%
813 - Religious, grant-making, civic, and professional and similar organizations	97	88	22	9	1	1	0	0	0	218	3.0%
523 - Securities, commodity contracts, and other financial investment and related activities	198	11	2	1	1	1	0	0	0	214	3.0%
561 - Administrative and support services	127	41	20	16	4	1	0	0	0	209	2.9%
812 - Personal and laundry services	116	43	21	3	0	0	0	0	0	183	2.5%
721 - Accommodation services	67	27	10	8	7	1	2	1	0	123	1.7%
113 - Forestry and logging	71	20	10	4	3	0	0	0	0	108	1.5%
484 - Truck transportation	68	28	3	5	3	1	0	0	0	108	1.5%
445 - Food and beverage stores	38	20	17	16	2	6	4	0	0	103	1.4%
624 - Social assistance	72	8	5	5	8	3	1	0	0	102	1.4%
453 - Miscellaneous store retailers	35	25	17	6	3	1	0	0	0	87	1.2%
441 - Motor vehicle and parts dealers	37	13	14	14	8	0	0	0	0	86	1.2%

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 five since 2008, while Real estate has experienced significant growth. The growth in the real estate sector is most likely 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.

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

Lanark County - June 2017

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	840	32	6	6	2	1	1	0	0	888	15.8%
541 - Professional, scientific and technical services	510	152	30	12	3	1	0	0	0	708	12.6%
238 - Specialty trade contractors	294	123	48	28	6	1	1	0	0	501	8.9%
621 - Ambulatory health care services	136	80	22	15	3	1	2	0	0	259	4.6%
236 - Construction of buildings	141	57	19	9	6	0	0	0	0	232	4.1%
722 - Food services and drinking places	54	32	39	33	27	7	1	0	1	194	3.5%
112 - Animal production and aquaculture	165	17	2	0	1	0	0	0	0	185	3.3%
523 - Securities, commodity contracts, and other financial investment and related activities	160	16	3	0	0	0	0	0	0	179	3.2%
561 - Administrative and support services	120	36	12	7	3	1	0	0	0	179	3.2%
111 - Crop production	147	18	3	3	2	0	0	1	0	174	3.1%
811 - Repair and maintenance	99	49	16	3	0	0	0	0	0	167	3.0%
812 - Personal and laundry services	101	31	16	3	4	0	0	0	0	155	2.8%
813 - Religious, grant-making, civic, and professional and similar organizations	68	40	17	5	1	0	0	0	0	131	2.3%
624 - Social assistance	59	10	7	7	3	1	0	0	0	87	1.6%
484 - Truck transportation	52	18	2	3	3	0	0	0	0	78	1.4%
445 - Food and beverage stores	30	8	14	9	5	1	4	1	0	72	1.3%
453 - Miscellaneous store retailers	39	18	9	5	1	0	0	0	0	72	1.3%
441 - Motor vehicle and parts dealers	29	9	8	19	5	1	0	0	0	71	1.3%
611 - Educational services	43	10	0	2	2	0	0	0	0	57	1.0%
524 - Insurance carriers and related activities	29	14	7	3	2	1	0	0	0	56	1.0%

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 three since 2008 while Real estate has been steadily working its way to the top since 2008.

According to the **2016/2017 Employer One Survey Results**, the two government and educational programs that were the most accessed by local businesses are Wage Subsidy, 26.2% and Co-op Placement, 25.0%.

Download the 2016/2017 Survey Results
 here: www.renfrewlanark.com

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

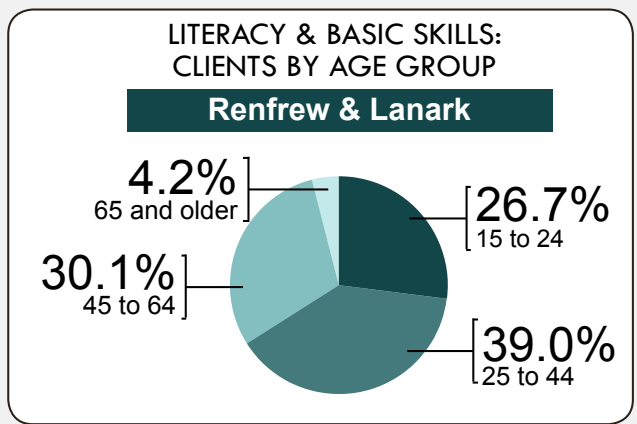
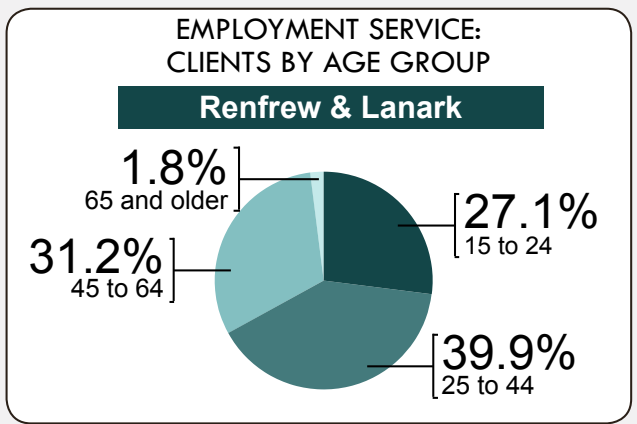
EMPLOYMENT ONTARIO CLIENT DATA

2016/2017

For the fifth 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 2016-2017 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
3,734 Employment Service Assisted Clients
619 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 45 to 64 year-olds with a decrease of clients by 1.4%. There was a 1.0% increase in 25 to 44-year-old clients.

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

The majority of Literacy and Basic Skills Clients fall between the ages 25 and 44.

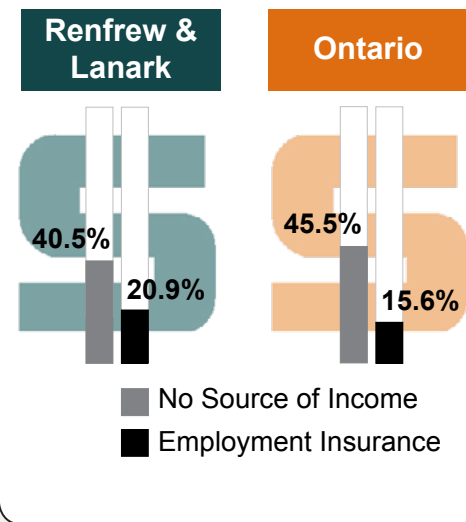
The age category with the most significant change from last year is the 25 to 44 year-olds with an increase of clients by 4.7%. There was a 2.9% decrease of 15 to 24-year-old clients.

In Renfrew & Lanark Counties...

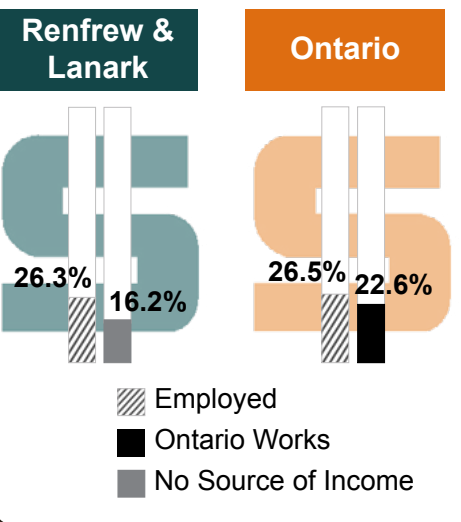
There were **87** Internationally Trained Individuals out of the 3,734 Employment Service Assisted Clients.

EMPLOYMENT ONTARIO CLIENT DATA

TOP 2 SOURCES OF INCOME FOR EMPLOYMENT SERVICE CLIENTS



TOP 2 SOURCES OF INCOME FOR LITERACY AND BASIC SKILLS LEARNERS

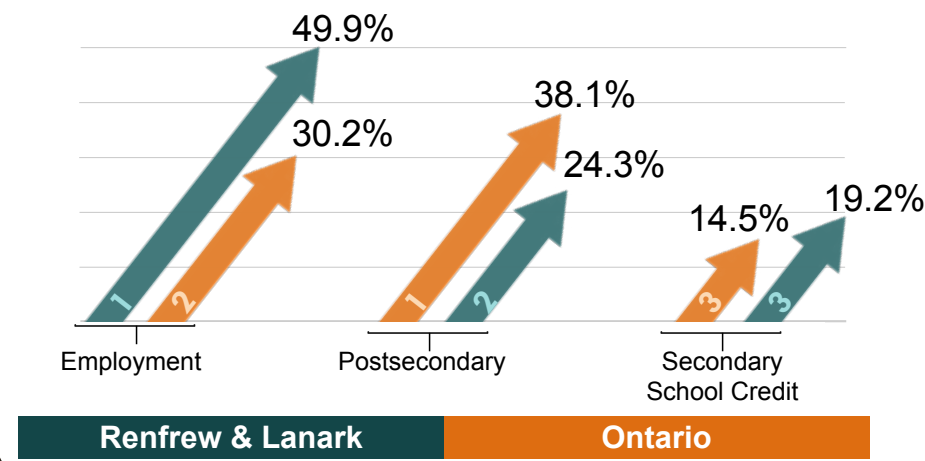


The percentage of Employment Service clients without a source of income in Renfrew & Lanark Counties has increased by 0.5% for the 2016/2017 year. Clients with Employment Insurance as income increased by 3.5%

The provincial number of clients without a source of income has climbed 0.6% from last fiscal year.

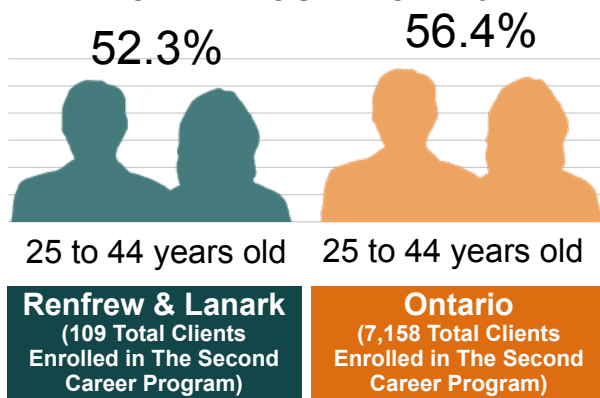
In Renfrew and Lanark, the top source of income for LBS learners in 2016/17 was employment (26.3%) and No Source of Income (16.2%).

LITERACY & BASIC SKILLS TOP 3 LEARNER GOAL PATHS



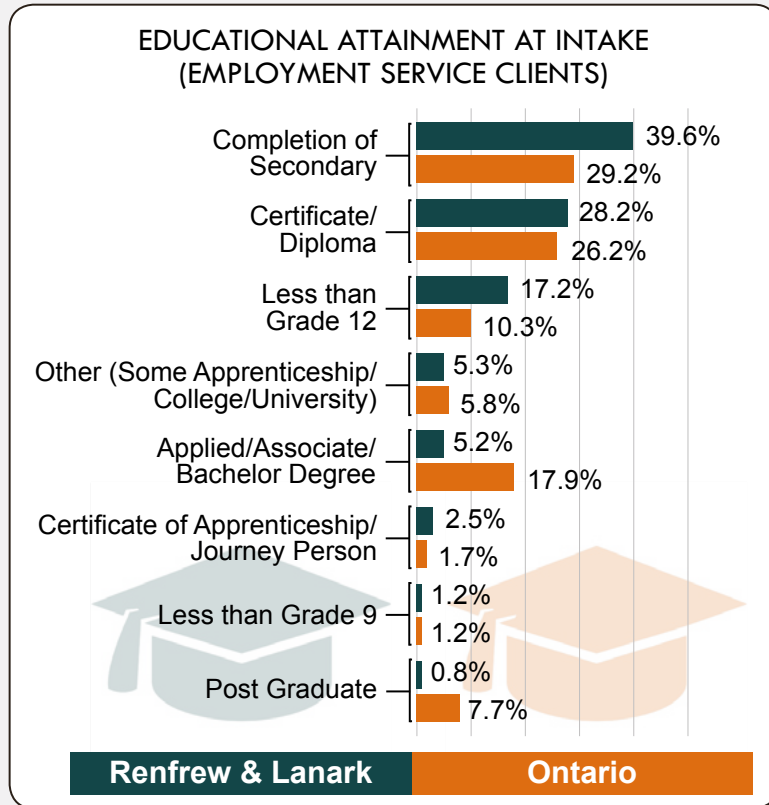
The Employment goal pathway continues to be the most common goal for LBS learners in Renfrew and Lanark Counties with nearly half of learners with this goal. Postsecondary is the second top learner goal pathway for LBS learners in Renfrew and Lanark Counties at 24.3%.

HIGHEST AGE CATEGORY OF SECOND CAREER PROGRAM CLIENTS



The amount of Second Career clients in Renfrew and Lanark counties decreased by 3.5% since last year. The category with the most significant decrease was the 45 to 64 year-olds with a drop of 6.9%.

EMPLOYMENT ONTARIO CLIENT DATA



APPRENTICESHIP

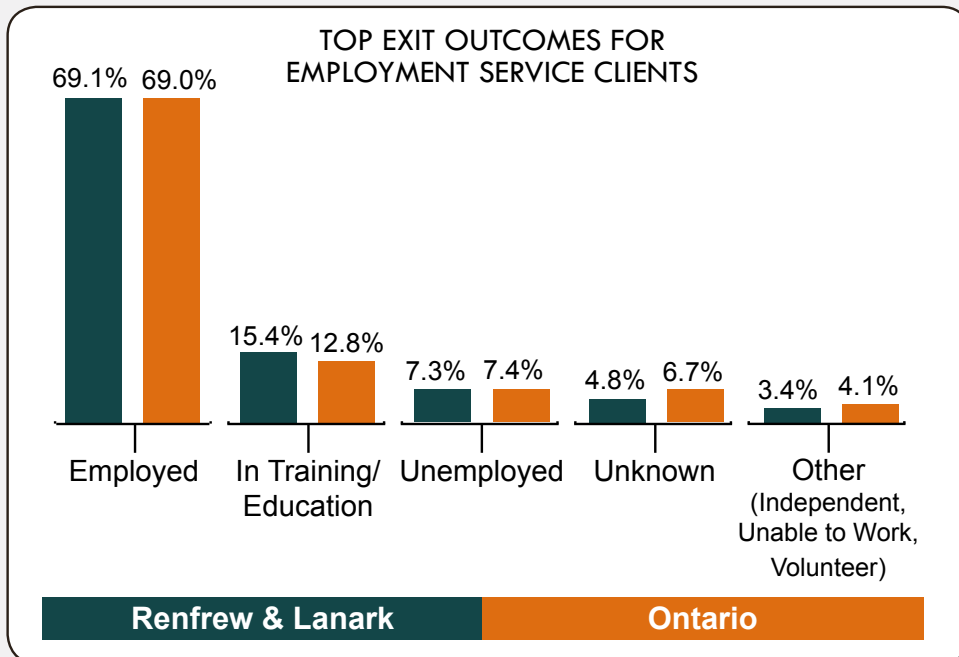
Renfrew & Lanark

204
Certificates of Apprenticeship Issued

196
Modular Training Registrations

275
New Registrations

1,485
Active Apprentices









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

- Automotive Service Technician**
- Hairstylists and barbers**
- General Carpenter**

Employment remains the top exit outcome for Employment Services Clients in Renfrew and Lanark Counties at 69%, which is the same as the Province.

EMPLOYMENT ONTARIO CLIENT DATA

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

Renfrew & Lanark	Ontario
<p>1  Service support and other service occupations, n.e.c.</p>	<p>1  Service support and other service occupations</p>
<p>2  Trades helpers, construction labourers and related occupations</p>	<p>2  Labourers in processing, manufacturing and utilities</p>
<p>3  Transport and heavy equipment operation and related maintenance occupations</p>	<p>3  Service representatives and other customer and personal services occupations</p>

The top three employment occupation outcomes for Employment Services clients in Renfrew and Lanark Counties are Service support and other service occupations, n.e.c., Trades helpers, construction labourers and related occupations and Transport and heavy equipment operation and related maintenance occupations.

Service support and other service occupations, replaced Labourers in processing, manufacturing and utilities as the top occupation since last year. The second and third spots remain unchanged.

EMPLOYMENT SERVICE - TOP 3 EMPLOYED OUTCOME, INDUSTRIES (NAIC) 2-DIGIT GROUP

Renfrew & Lanark	Ontario
<p>1  Accommodation and Food Services</p>	<p>1  Administrative and Support and Waste Management and Remediation Services</p>
<p>2  Construction</p>	<p>2  Accommodation and Food Services</p>
<p>3  Retail Trade</p>	<p>3  Retail Trade</p>

The top three employment industry outcomes for Employment Services clients in Renfrew and Lanark Counties are Accommodation and Food Services, Construction and Retail Trade.

Accommodation and Food Services replaced Manufacturing as the top industry since last year. The second and third spots remain unchanged.

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 **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.

Ontario's Government is introducing the new **Employing Youth Talent Incentive Program** to help small businesses and employers hire and retain youth aged 15-29. These incentives will be delivered through the Employment Service and Youth Job Connection Programs and will offer employers \$2000 to hire and retain youth.

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 PROJECT

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

In fiscal 2016/2017 and in the first two quarters of 2017/2018, the project carried out a number of initiatives aligned with the four project priorities identified in our 2017-2020 funding application. The federal department of Immigration, Refugees, and Citizenship Canada has approved the following initiatives to go forward for the remainder of the funding period:

- 1) Targeted efforts to engage with local and regional municipalities and elected officials in order to improve our intentional planning and policy surrounding welcoming and attractive communities.
- 2) Build capacity for the broader community to respond to municipal and organizational efforts to integrate newcomers with an enhanced ability to think and behave with intercultural competency.
- 3) Improve access to and provision of ESL in communities where Ministry-funded classrooms do not exist.
- 4) Continue to support and engage with groups for the Private Sponsorship of Refugees.

Each of these targeted areas is aligned with the greater mandate of LIP and with the needs identified by the communities we serve. In addition to these specific areas of impact, the LIP staff has also engaged in a number of supporting elements. In order to bring the newcomer voice to various planning tables, the LIP project staff is now representing newcomer interests or leading planning development with the following committees:

- a. The Renfrew County Youth Network Strategy Working Group
- b. The Child Poverty Action Network's Living Wage Working Group
- c. The Perth and Area Vital Signs Advisory Council
- d. The Renfrew County Mental Health Planning Table
- e. Petawawa Inclusion Project

We have a number of initiatives planned that will support the above priority areas. They are as follows:

- 1) Targeted efforts to engage with local and regional municipalities and elected officials in order to improve our intentional planning and policy surrounding welcoming and attractive communities.
 - a. Session delivered at Ontario East Municipal Conference "The Worth of our Welcome"
 - b. 24 Municipal delegations have taken place to divulge changing demographics and economic opportunities tied to newcomers
 - c. Partnership with Big Data for Small Places Pilot to engage effective use of data sets to support our presentations and evidence-based decision-making
 - d. Meetings with local municipalities have begun on a case-by-case basis to provide advice and support for policy and planning initiatives related to welcoming and attractive communities
 - e. Research was conducted to identify best practices and lessons learned from municipalities who have begun working towards intentional welcoming community approaches

2) Build capacity for the community to respond to municipal and organizational efforts to integrate newcomers with an enhanced ability to think and behave with intercultural competency.

- a. Partnership with Algonquin College to provide Cultural Inclusivity at Work certification program for organizations and the broader public
- b. Creation and execution of Grade 10 and Grade 6 education programs on the valuation of diversity and to inspire trickle down initiatives that support the learning available for free in all classrooms in Renfrew and Lanark Counties
- c. Provision of Welcoming Syrians training module with community groups for the private sponsorship of refugees, agencies serving refugees, and the broader public

3) Improve access to and provision of ESL in communities where Ministry-funded classrooms do not exist.

- a. Community Language Support Program Pilot initiated with Algonquin College as the lead partner and funded by the Canadian Red Cross in early 2017 for continuation until December 2017
- b. Our partner Algonquin College hired the Community Language Support Coordinator in early 2017
- c. Grant proposal to The Ontario Ministry of Citizenship and Immigration submitted in August 2017 for the long-term continuation of this now proven model until 2020
- d. Partnership developed with a language assessment pilot project initiated in the Ottawa area for improved access to Language Assessments
- e. Development of an online ESL resource page in order to provide 24/7 access to high quality resources and materials for volunteer ESL instructors
- f. Sharing and duplication of the model is already underway in a similar region within rural Ontario

4) Continue to support and engage with groups for the Private Sponsorship of Refugees.

- a. Provide on-going local support for the development and execution of settlement plans
- b. Conduct research through consultation with sponsors in order to continually gather information about and address needs
- c. Liaise with the federal department when required on behalf of the sponsorship groups
- d. Create opportunities for sharing best practices and lessons learned between the various groups
- e. Provide connections to various service providers within the region and also in the Ottawa area when required

The LIP Renfrew Lanark is committed to creating change in the area we serve with regards to the attraction, integration, and retention of newcomers for a greater long-term community and economic benefit. We also champion leadership in this sector within Eastern Ontario by engaging with a larger network and contributing to positive and strength-based planning and prioritization. If you would like to get involved with the project, please reach out to our office by emailing or calling:

Chéla Breckon, Project Manager
613-735-4700 x 2882

Kate Walker, Project Officer
613-735-4308 ext 2878

immigrationpartnership@gmail.com
<http://www.facebook.com/newcomerontario>
www.immigrationpartnershiprenfrewlanark.com

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

102 employers completed the survey

The top two industries represented are Retail Trade, **28%** and Accommodation and food services, **18%**

3,300 employees are represented in the survey

47% of employees are employed full year, full-time

64% of businesses plan on hiring over the next year

Expansion or Restructuring, **83%** is the main reason for anticipated job openings

43% of business had difficulty filling positions over the last year

The leading reasons positions are hard to fill are Lack of applicants, **19%** and Applicants not meeting education level or credentials qualifications **17%**

Basic job training, **18%** Health & safety, **16%** and Orientation of new employees **15%** are the most common types of training businesses will focus on over the next year

The most common programs accessed by businesses are Wage Subsidy, **26%** and Co-op Placement, **25%**

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



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
- Access customized workforce profiles for your organization immediately
- Compare regional results
- Ensure Renfrew and Lanark Counties have a sustainable 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.

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

- Business Profile Video
- \$100 Restaurant Gift Certificate

To view Survey Results from the 2016/2017 Employer One Survey, please visit our website at:
www.renfrewlanark.com



To complete the Survey online, please visit:
<https://www.surveymonkey.com/r/6C6MHY5>



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



ACTION PLAN REVIEW 2016/2017

The following is a brief summary of the projects undertaken from 2016-2017 and the outcomes achieved.

PROJECT 1: EMPLOYER ONE SURVEY (2016-2017)	
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 102 Employer One surveys by local employers.
Project Outputs	A detailed report summarizing the information gathered from employers submitted to the MAESD in March 2017.
	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	The facilitation of two professional development days for Employment Ontario service providers. The production and distribution of our quarterly Labour Market Bulletin. The production of custom LMI packages for EO offices throughout the region.
Measurable Outcomes	The delivery of two successful workshops. Participants will have a better understanding of the Local Labour Market and resources available to them.
	Labour Market Bulletins distributed (electronically) to over 1,000 contacts within the region.
Project Outputs	The production of a quarterly Labour Market Bulletin.
	The production and electronic delivery of custom LMI packages for EO service providers using the EMSI Analyst tool.
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.

THE FUTURE OF MANUFACTURING **FORUM AND CONSULTATION**

On October 26, 2017 the Labour Market Group of Renfrew & Lanark held the Future of Manufacturing Forum in Renfrew County. The goal of the event was to develop a grassroots community plan of action to support the local manufacturing sector, which is struggling to fill skilled positions.

Priorities: The following six items have been identified as priorities that can and will be implemented in the next 12 months. The Labour Market Group is committed to coordinating this community based plan and providing regular updates.

1. Establish working group consisting of stakeholders including municipal and provincial government, private enterprises, education sectors, and Employment Ontario service providers to establish a comprehensive plan that identifies primary goals, activities to be done, responsibilities, resource required, dates and who is accountable. The group would meet and report regularly.
2. Travelling Career Fair (promoting career paths to youth, options, etc.). Manufacturers going into high schools and doing presentations on all of the career choices available and provide opportunities for open house experiences in the plant.
3. Coordinate job fairs specific to the manufacturing industry targeted to talent inside and outside the region. County-wide travelling job fair with a few different locations & training for employers on how to recruit using new technologies.
4. Grow the immigrant employer council (LIP). Settlement services for newcomers (needs analysis, etc.).
5. Research - engage in more surveys to evaluate what the training needs are, what skills the industry is looking for - Labour Market group - what are the average wages, benefits Research and communication within the industry and with the schools.
6. Multi-media/social media marketing to reach new employees about the opportunities in and to come to our region. i.e., to target relevant closing businesses in other regions, students in specific trades/training/ education programs, etc.



A pre-forum consultation/ survey was conducted with manufacturers across Renfrew County. Thirty businesses participated in the survey which could be conducted in person or online.

To obtain the full copy of the report or the highlights version, please visit www.renfrewlanark.com.



**Forum participants engaged in discussion.
October 26, 2017**

EO AND LBS ROUND TABLE **PROFESSIONAL DEVELOPMENT EVENT**

In October 2017, The Labour Market Group of Renfrew and Lanark coordinated a professional development event with all of the Employment Services and Literacy and Basic Skills agencies across the region. During the round-table discussion, representatives from Employment Services reported issues around a need for increased apprenticeship availability throughout the Region. Attendees also expressed an interest using Labour Market Information tools like the EMSI Analyst tool to provide updated employment statistics to better serve their clients.

Literacy and Basic Skills providers noted that improving employment pathways to education and training for clients would produce more favorable outcomes. Assisting learners to identify transferable skills and more about digital communications is important. Rebranding and promoting LBS services and increasing marketing strategies at the provincial level was also suggested as a means of improving overall services.

The group as a whole reported a higher number of older clients wanting to access services and were very interested in more professional development and networking opportunities.



PLAN OF ACTION 2017/2018

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 2018.

PROJECT 1: EMPLOYER ONE SURVEY (2017-2018)	
Project Description	To conduct the employer one survey with 125 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.
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	ETM Industries Inc.	Leclerc, JP
Albany International Canada	Little, Joanne	Excellence in Manufacturing Consortium	Diggins, Al
Algonquin College	Bramburger, Jamie Davis, Anne Dick, Brent Kidd, Jennifer Moon, Wendy	Forward Thinking Marketing & Media	Layman, Jennifer
Algonquin Employment Services Perth	Benoit, Lisa	Garrison Petawawa	Chubbs, Charlene Gagnon, Ed Malone, Diane Yutronkie, Edna
Algonquins of Pikwàkanagàn	Two-Axe Kohoko, Amanda Meness, Lisa Lightbody, Christine	Giant Tiger, Pembroke	Hammill, Lou
Arnprior Aerospace	Pierce, Brent	Greater Arnprior Chamber of Commerce	Hughes, Murray
Arnprior and District Memorial Hospital	Woods, Cyndy	HGS Canada	Brunette, Danielle Woods, Leanne
Arnprior Builders' Supplies	Sullivan, Tom	Home Hardware, Deep River	Kreiger, Connie
Arnprior Economic Development	Wilson, Lindsay	Industrial Research Assistance Program/National Research Council	Hitchmough, Ken
Bonnechere Caves	Hinsperger, Chris	Kenwood Corporate Centre	Nibourg, Mark
Calabogie & Area Business Assoc.	Jakes, Carolyn Parker, Bruce	KI Pembroke LP	Lane, Harry
Canadian Career Academy, Carleton Place	Bennett, Laura Field, Kim Probert, Rob	Lanark-North Leeds Enterprise Centre	James, Cindy
Canadian Nuclear Laboratories	Quinn, Pat Sweet, Susan	Literacy Link Eastern Ontario	Noyes, Doug
Canadian Tire, Deep River	Fitton, Will	Lockwood's Rona Building Centre	Lockwood, Bob
Canadian Tire, Pembroke	Birch, John	Magellan Aerospace Haley Industries	Scott, Emily
Career Transition Services	Hardy, Trudy	Ministry of Agriculture Food and Rural Affairs	Moore, Bruce Lavictoire, Yves Ritchie, Brian
Carleton Place & District Chamber of Commerce	Kavenagh, Jackie MacDonald, Donna	Ministry of Citizenship and Immigration, Ministry of Tourism, Culture and Sport	Goold, Carmen
City of Pembroke	LeMay, Mike	Ministry of Community and Social Services	Treidlinger, Ben
Community Employment Services, Pembroke	Dick, Brent	Ministry of Economic Development and Trade	Kew, Hollee
Community Living Association, Lanark	Wright, Bruce	Ministry of Small Business & Consumer Services	Haddon, Steve
Community Living Upper Ottawa Valley	Grayson, Chris Wilson, Tina	Ministry of Tourism	Harris, Jonathan
Community Resource Centre	King, Joanne	Ministry of Advanced Education and Skills Development	Gapp, Sandra
County of Renfrew, Economic Development & Natural Resources	Baird, Alastair Wybou, David	Mississippi Mills Chamber of Commerce	Rudyk, Nathan
County of Renfrew, Ontario Works	Dombroskie, Jennifer	MJM Consulting	McLaren, Jay
Deep River and District Hospital	Wilkie, Ian	Murray Bros. Lumber Company	Sullivan, Tom
East Side Mario's, Pembroke	Gauthier, Jen	Nylene Canada	Clouthier, Bob Guindon, Frank Steeds, Dave
Economic Development & Employability Network of Ontario	Lamb, Guillaume Plourde, Martine	Omya Canada Inc.	Sparks, Larry
Employment Networks	Peacock, Susan	ontrac Employment Resource Services	Hunt, Kathy Sovey, Linda Toop, Michelle
Ensyn Technologies	Gorsky, Garth	Ottawa Valley Glass	McHale, Shawn
Enterprise Renfrew County, Pembroke	Fraser, Kim Sadler, Colleen	Pacific Safety Products	Larson, Suzanne Rosien, Nancy
		Pastway Planing	Pritchard, Arnie
		Pembroke Downtown Development Commission	Picard, Chantal

APPENDIX A: COMMUNITY CONSULTATION PARTICIPANTS

Pembroke Mall	Brophy, Jayne	The Delphi Group	Larry, Schruder
Pembroke MDF	McComb, Cindy	The Mall Laundromat	Juhasz, Richard
Pembroke Regional Hospital	Thomas, Danielle	Times Fiber	Dunbar, Lillian MacMillan, Laurie
Perth & District Chamber of Commerce	LeVatte, John	Town of Arnprior	Donaldson, Larry Smith, Robin
Perth & Smiths Falls District Hospital	Evans, Dave	Town of Carleton Place	Ralph, Jasmin Sonnenburg, Ed
Perth Downtown Committee	Hanscon, Heather	Town of Perth	Buchanan, Casey
Perth Home Hardware	Grissham, Ruth	Town of Petawawa	Phillips-McCann, Cyndy
Pillar5Pharma	Graham, Anne	Township of Greater Madawaska	Emon, Peter
PMFRC Employment Services	Anderson, Louise	Township of Killaloe, Hagarty & Richards	Marion, Kathy
Renfrew & Area Chamber of Commerce	Logan, Tammy Villamere, Julie	Township of Laurentian Valley	Armstrong, Lauree Hodgkinson, George
Renfrew County Child Poverty Action Network	Smith, Lyn	Township of Madawaska Valley	Kelley, Craig Shulist, Dave
Renfrew County Community Futures Development Corporation	Lemenchick, Kelley McKinnon, Diane	Training & Learning Centre	Sue Rupert
Renfrew County District School Board /OYAP	Clarke, Roger	Triacta Power Technologies	Nichols, Karen
Renfrew County District School Board Continuing Education	Friske, Melissa	Tyerman & Daughters Inc.	Tyerman, Maggie
Renfrew County United Way	Logan-McMeekin, Gail	Upper Ottawa Valley Chamber of Commerce	MacKenzie, Lorraine McInall, Brian
Renfrew Industrial Commission	Lemkay, Dave	Valley Artisans' Co-op	White, Leslie
Renfrew Victoria Hospital	Hunter, Judy	Valley Automation	Fletcher, Todd
Rose Integration	Bishop, Ryan Whitelaw, Graham	Valley Heartland Community Futures Development Corporation	Joynt, Bridget
Scapa Tapes	Boldt, Andy	Willis College - Smiths Falls	Lever, Shannon Russett, Lynn
Scotiabank Pembroke	Becvar, John	Women's Shelter and Support Services	Sweeney, Leigh
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		

APPENDIX B: INFORMATION SOURCES

Statistics Canada (2011 and 2016 Census, 2011 National Household Survey , Canadian Business Patterns)
www.statcan.gc.ca/eng/start

Algonquin College - Pembroke
www.algonquincollege.com/pembroke

Algonquin College - Perth
www.algonquincollege.com/perth

Algonquins of Pikwàkanagàn First Nation
algonquinsofpikwakanagan.com

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

County of Renfrew Website
www.countyofrenfrew.on.ca

EMSI Analyst Tool
www.economicmodeling.com

The Daily Observer
www.thedailyobserver.ca

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

This Report was prepared by Matt LeMay, Coordinator, Hellen Lavric, Renfrew County Coordinator and Shauna Kennedy, Lanark County Coordinator of The Labour Market Group of Renfrew & Lanark.

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www.ontario.ca/employmentontario

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The views expressed in this document do not necessarily reflect those of the Employment Ontario.

Cover photos:

Options Skilled Trades Career Fair 2015-2016
photos by Shauna Kennedy

Document photos:

Pages 5, 10: The Algonquins of Pikwàkanagàn First Nation

Page 8: Algonquin College, Pembroke Campus, Perth Campus

Page 27: Algonquin College, Pembroke Campus

All other photos: Options Skilled Trades Career Fair 2015-2016
photos by Shauna Kennedy



A Skilled Workforce Contributing to a Prosperous Ontario



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