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North Superior
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Settling Down in the Northwest

Stability and Opportunity in the Northwestern Ontario Labour Market

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Northern Policy Institute is Northern Ontario's independent think tank. We perform research, collect and disseminate evidence, and identify policy opportunities to support the growth of sustainable Northern Communities. Our operations are located in Thunder Bay and Sudbury. We seek to enhance Northern Ontario's capacity to take the lead position on socio-economic policy that impacts Northern Ontario, Ontario, and Canada as a whole.

Vision

A growing, sustainable, and self-sufficient Northern Ontario. One with the ability to not only identify opportunities but to pursue them, either on its own or through intelligent partnerships. A Northern Ontario that contributes both to its own success and to the success of others.

Mission

Northern Policy Institute is an independent policy institute. We exist for the purposes of:

- The development and promotion of proactive, evidence based and purpose driven policy options that deepen understanding about the unique challenges of Northern Ontario and ensure the sustainable development and long-term economic prosperity of Northern Ontario;
- The research and analysis of:
 - » Existing and emerging policies relevant to Northern Ontario;
 - » Economic, technological and social trends which affect Northern Ontario;
- The formulation and advocacy of policies that benefit all Northern Ontario communities that include Aboriginal, Francophone, remote/rural communities, and urban centres; and,
- Other complementary purposes not inconsistent with these objectives.

Values

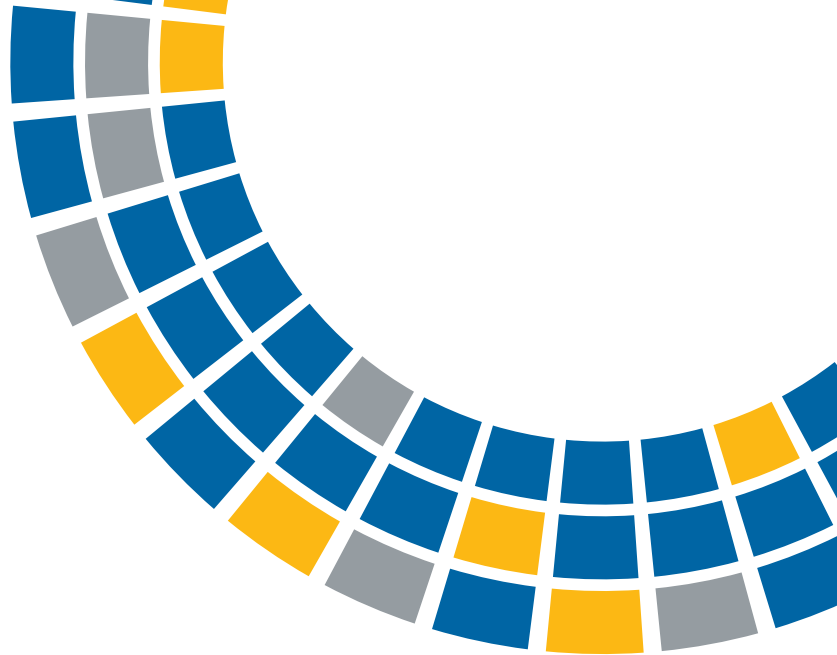
Objectivity: Northern Policy Institute is a non-partisan, not-for-profit incorporated body providing fair, balanced and objective assessments of policy issues in a pan-Northern Ontario context;

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North Superior
Workforce Planning Board

About the North Superior Workforce Planning Board (NSWPB)

Our Mission

Connecting community partners to improve the quality of life in our communities through workforce development.

The North Superior Workforce Planning Board (NSWPB) is one of twenty-five Workforce Planning zones across Ontario, mandated through the Ministry of Training, Colleges and Universities to identify, assess and prioritize the skills and knowledge needs of community, employers and individual participants/learners in the local labour market through a collaborative, local labour market planning process.

An active and broadly-based volunteer Board of Directors governs its affairs. First established in 1996, NSWPB is recognized by community, economic and municipal leaders as a “partner of choice” in the identification and implementation of local solutions to local labour market issues.

Workforce Planning Boards play a key role in the Ministry of Training, Colleges and Universities' goal of integrating its programs and services. Part of the ongoing strategy to achieve this goal is to first identify and then respond to the diverse regional and local labour market needs through the province.

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About the Author

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James Cuddy joined Northern Policy Institute as an analyst in 2014. He has over 5 years of experience in writing broadly on economic issues, with a focus on regional and urban economics and labour market concerns. As a skilled leader with a strong communications background, he currently assists in the coordination and delivery of the Institute's research agenda.

James is a graduate of Carleton University with a B.A. in Economics and is currently working towards his M.A. in Economics from the University of Ottawa.

Executive Summary

This report serves as a summary of the labour market in Northwestern Ontario. It is not meant to be exhaustive, but instead, provide an overview of the underlying trends and characteristics that should be fundamental considerations for understanding regional growth. The first section of the paper covers labour force characteristics including population, employment, participation, unemployment, and trends specific to the youth labour market. The second section covers the structure of the labour market, focussing on the distribution of employment among sectors and industries.

Summary of findings from Part 1:

- Population growth in Northern Ontario is stagnant and is projected to experience negligible growth. From 2012 to 2036, population in the Northwest is expected to increase by 3.9 percent, while the Northeast is expected to decrease by 1 percent, yielding a marginal net increase for Northern Ontario as a whole.
- Population in Northern Ontario has been shrinking as a percentage of the provincial population since it peaked in the 1940s and is projected to make up only 4.6 percent of provincial population in 2036, down from roughly 6 percent in 2011.
- Job growth in the Northwest has been facing difficulties since 2003-2004, while continuously shrinking as a percentage of total provincial and national employment. There have been some signs of growth in 2012 and 2013, however; employment figures remain among their lowest levels since 1987.
- Employment rates in Northwestern Ontario are more volatile, and in recent years, significantly lower, than provincial and national levels.
- Full-time employment rates in the Northwest are persistently lower than provincial and national levels. Since 1987, full-time employment in the Northwest has been between 2 and 10 percent lower than the province and nation, and as of 2013, was roughly 3 percent lower.
- Participation rates in the region have been lower than provincial and national levels since 2005.
- Given that the Northwest has experienced relatively lower employment and participation rates since 2005, solely relying on unemployment rates as a regional labour market comparator can be misleading.
- Since 2001, the Northwest has continuously experienced annual youth out-migration. In 2013, there was a net decline of roughly 400 individuals aged 15 to 29, the majority of which were 20 to 24 years old.

Summary of findings from Part 2:

- The lack of employment growth in the goods-producing sector has been prevalent across Ontario since 1987. However, beginning in 2003-2004, employment growth in this sector became considerably worse in the Northwest

relative to the rest of the province.

- Employment in primary industries has not been able to recover from a major decline experienced from 1989 to 1993, where the region shed nearly 80 percent of jobs in primary industries. Similarly, as of 2013, the region has not been able to recover from losing over 65 percent of jobs in the manufacturing industry between 2003 and 2009.
- Employment in the Northwest's services-producing sector has experienced modest growth, increasing by approximately 15 percent from 1987 to 2013. However, relative to the province as a whole, the Northwest's services-producing sector has grown considerably slower.
- Growth in services-producing sector appears to be largely driven by the expansion of employment in health care and social assistance. Importantly, trends in aging population coupled with regional youth and young adult out-migration will put pressure on the sustainability of this industry.
- Given that, a) the Northwest's services-producing sector (excluding health care) has remained relatively constant since 1987 and b) employment growth (or lack of) in manufacturing and primary industries have been largely responsible for the fluctuations in the regional labour market, employment in the Northwest is largely dependent on, and dictated by, these two industries.
- As a share of total employment in Northwestern Ontario, the goods-producing sector employed 30 percent of workers in 1987, which dropped to 26 percent in 2003 and 17 percent in 2013. As such, from 1987 to 2013, the services-producing sector has increased its employment share from 70 percent to 83 percent.
- Employment in trade and healthcare industries have remained the top two employers since 1987. As of 2013, health care and trade made up 19 percent and 16 percent of total regional employment, respectively.
- Employment in primary and manufacturing industries were the third and fourth largest employers in 1987. By 2013, employment shares in both of these industries declined considerably, making up 5 percent and 3 percent of total regional employment, respectively.
- As of 2013, three of the top four employment industries were in the public sector. However, this is largely due to a decline in manufacturing and primary industries, which has yielded a proportionately larger share of public sector jobs. In real terms, the public sector, and the services-producing sector in general (not including health care), has experienced little employment growth since 1987.

Part One

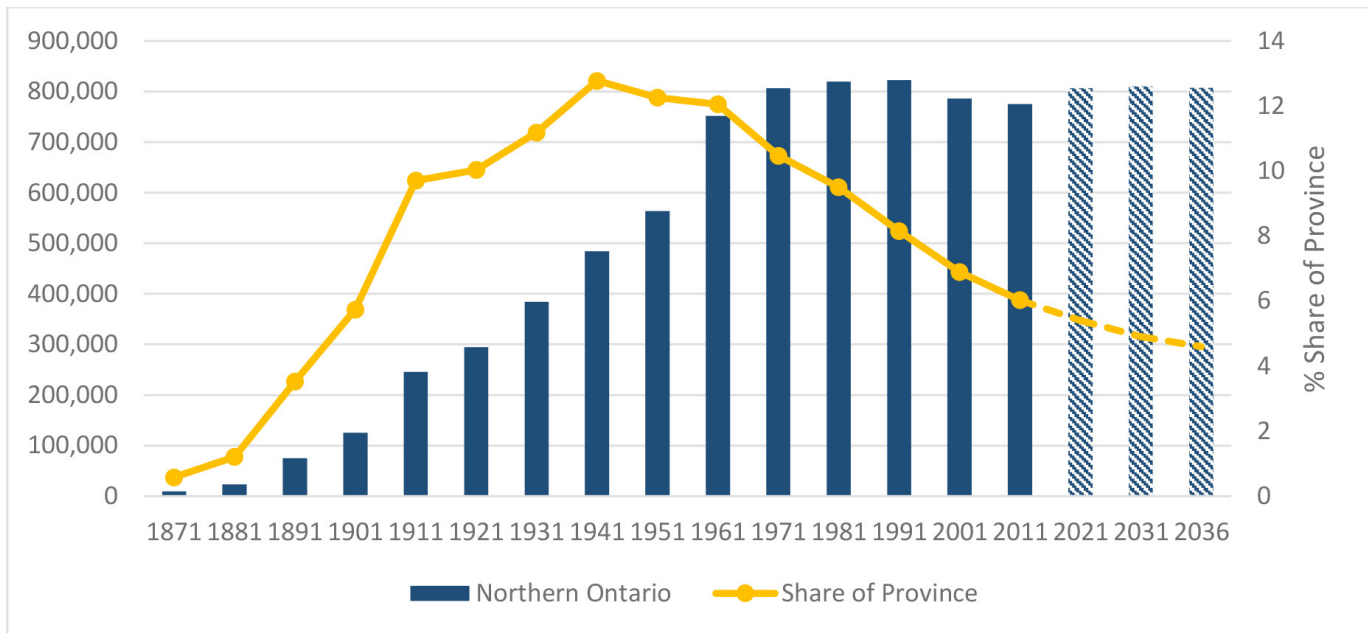
Labour Force Characteristics

Population

In 1871, the population of Northern Ontario was 9,390, and it steadily increased thereafter until it peaked in 1991 at 822,450 residents. Population in the following two decades experienced a decline, in both the Northeast and Northwest regions, bringing the total population in Northern Ontario to 775,178 in 2011. However, it was 40 years earlier, in 1951, when Northern Ontario's population stopped outpacing the population growth in the rest of the Ontario⁴. The region has never been able to recover from this trend.

The Ministry of Finance (2013) projects Northern Ontario's population to increase to 807,100 by 2036, which is a 0.5 percent increase from 2012. The Northwest's population is expected to increase by 3.9 percent, which will be partially offset by a 1 percent decrease in the Northeast. The modest increase in Northern Ontario's population will not be enough to keep pace with population growth of Ontario, therefore exacerbating the downward trend in the region's share of provincial population. In 2011, the region made up roughly 6 percent of the provincial population, which will decline to approximately 4.6 percent by 2036. These projections maintain Southcott's (2007a) earlier findings that Northern Ontario's population growth is stagnant in absolute terms, while continuing to shrink as a percentage of Ontario.

Figure 1. Historical and projected population in Northern Ontario, 1871-2036



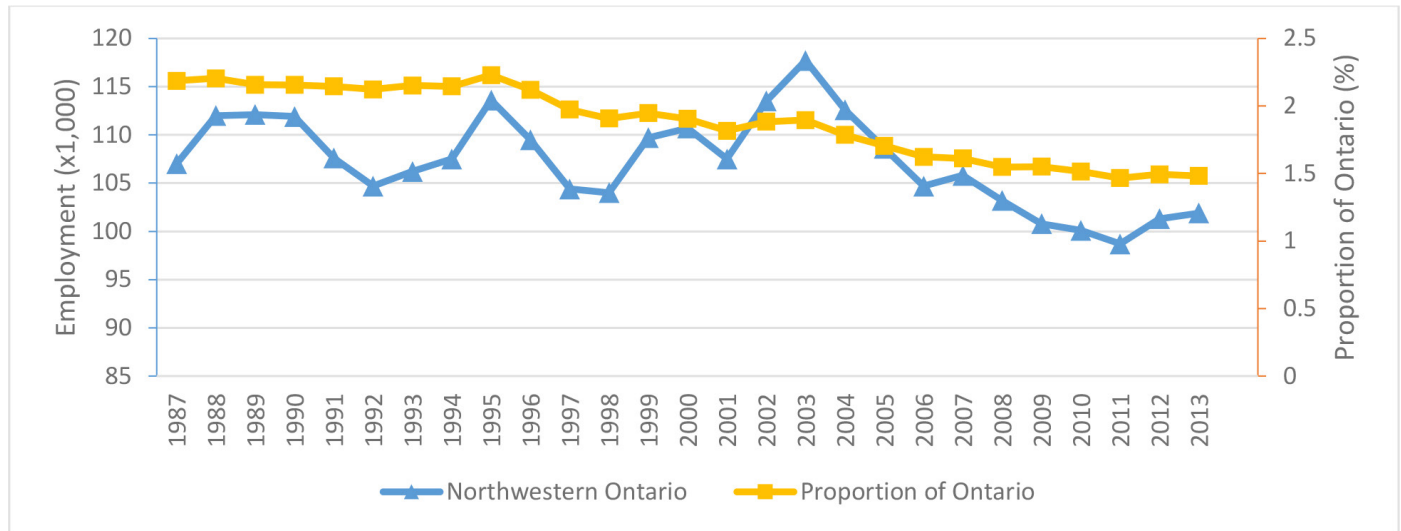
Source: Statistics Canada, Census of Canada, 1871 to 2011; Ontario Ministry of Finance projections, 2013

4 See Chapters 2 in Southcott (2006) for a more detailed history of population in Northern Ontario.

Employment

From 1987 to 2002, the number of people employed in Northwestern Ontario fluctuated within a range of roughly 105,000 to 114,000, until 2003 where it peaked at nearly 118,000 (Figure 2). After 2003, employment began to trend downwards until it reached a low of 99,000 people employed in 2011. However, it was as early as the mid-90s that the province began outpacing the region in employment. In 1995, employment in the Northwest made up 2.2 percent of total provincial employment, which decreased to 1.5 percent by 2013.

Figure 2. Total Employment



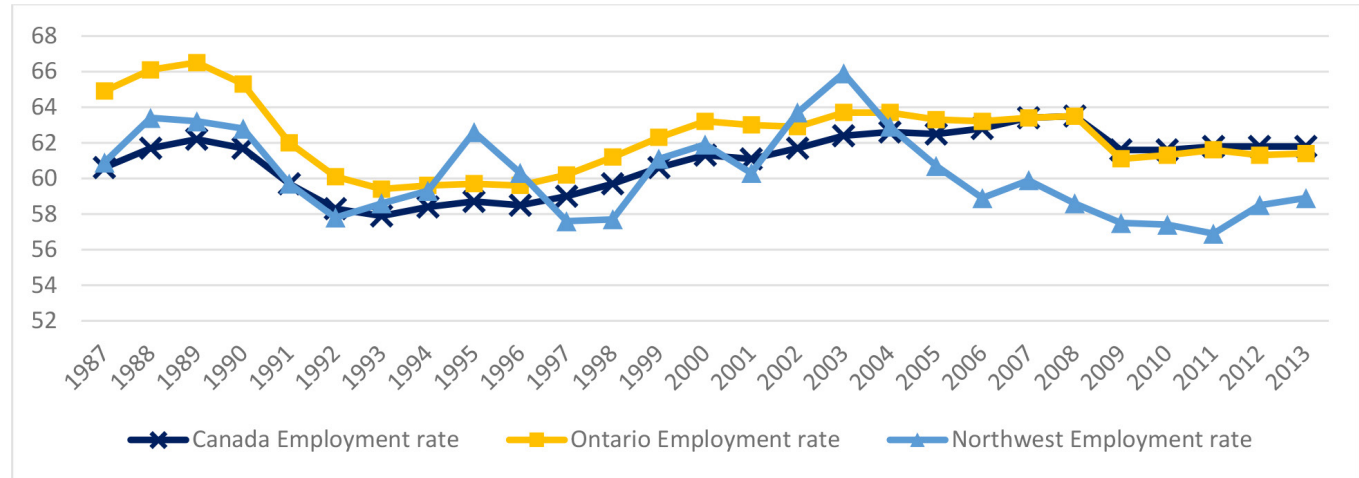
Source: Statistics Canada, CANSIM Table 282-0061, Labour Force Survey estimates (LFS)

The employment rate in Northwestern Ontario appears to be more volatile, and in recent years, significantly lower, than provincial and national rates.

As of 2013, the employment rate – the number of persons employed as a percentage of the population 15 years of age and over – in Northwestern Ontario was 58.9 percent, while Ontario was at 61.4 percent and Canada was at 61.8 percent (Figure 3). The employment rate in Northwestern Ontario appears to be more volatile, and in recent years, significantly lower, than provincial and national rates.

Figures 2 and 3 indicate that 2004 was a major turning point for employment in the Northwest, when long-lasting, structural challenges began. Since this point, there has been a downward trend in both the number of people with jobs in the region, as well as employment as a proportion of total provincial and national employment. Albeit, there have been some signs of employment growth in 2012 and 2013, however, it is the lowest it has been since 1987.

Figure 3. Employment Rate



Source: Statistics Canada, CANSIM Table 282-0055, Labour Force Survey estimates (LFS)

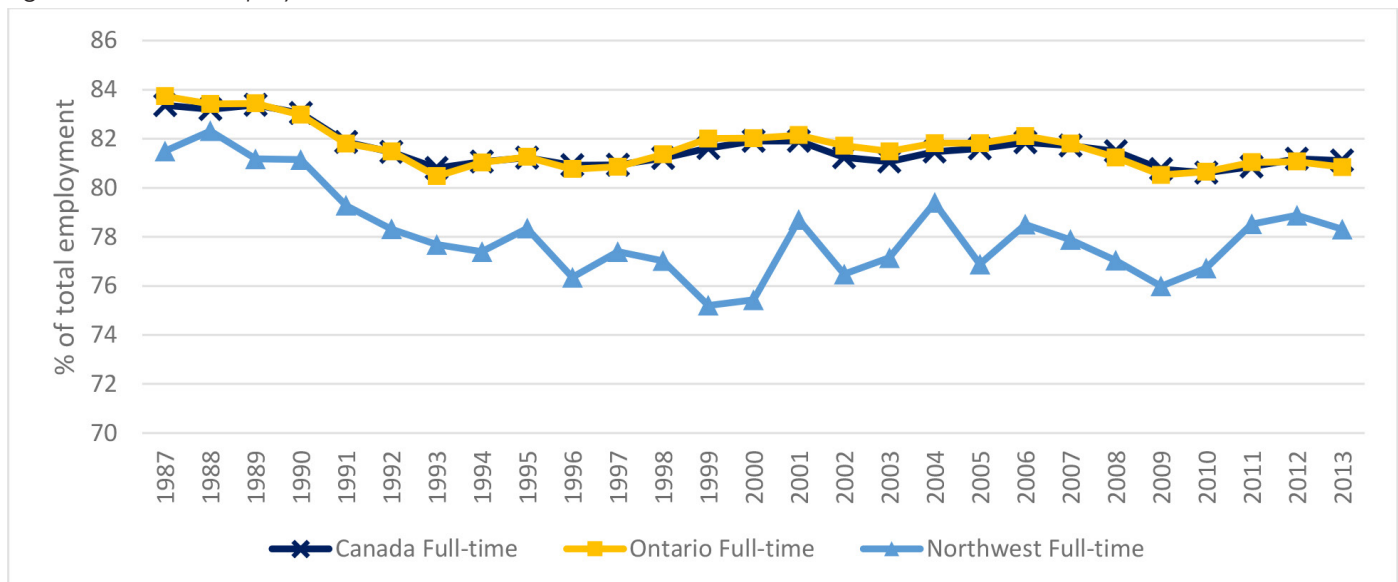
Full-Time Employment

Simply looking at the number of people who are with or without a job neglects to tell the whole story in a labour market. There are many additional factors that should be controlled for in order to understand the health of the labour market, one of which includes full-time employment.

Since 1987, full time employment as a percent of total employment in the Northwest has been lower than Ontario and Canada (Figure 4). As of 2013, 78 percent of jobs in the Northwest are full-time positions, compared to 81 percent in Ontario and Canada.

There appears to be a persistently lower ratio of full-time positions in the Northwest compared to Ontario and Canada. Since 1987, full-time employment in the Northwest has been between 2 and 10 percent lower than the province and nation, and as of 2013, was 3 percent lower.

Figure 4. Full-time Employment

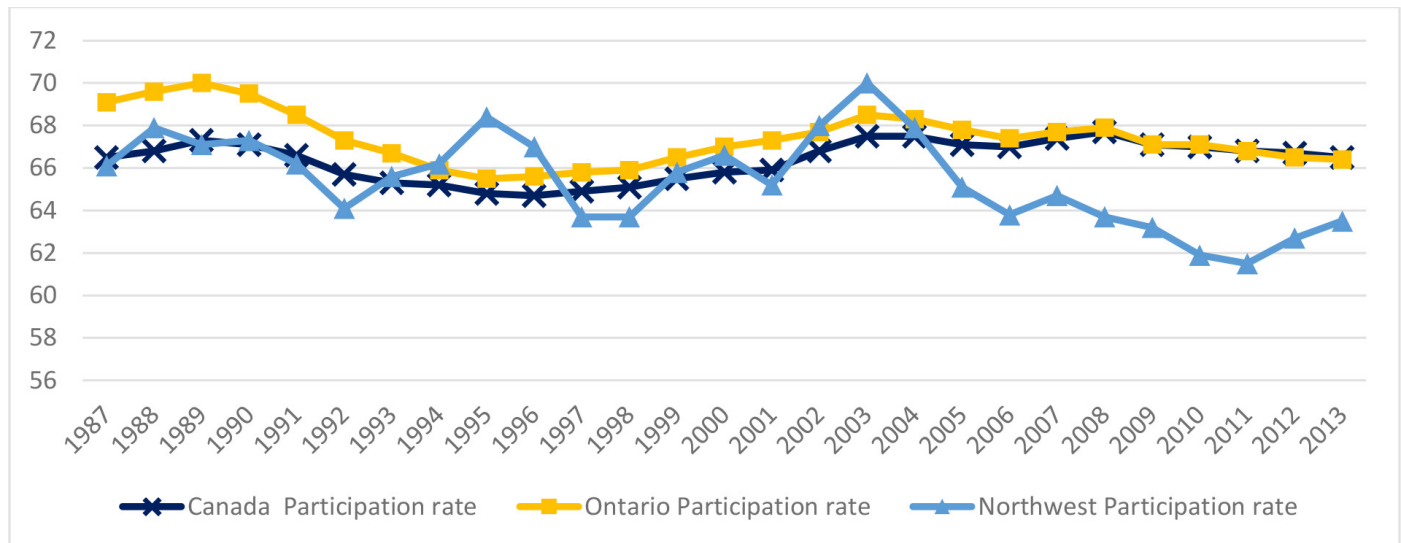


Source: Statistics Canada, CANSIM Table 282-0055, Labour Force Survey estimates (LFS)

Participation and Unemployment

The participation rate is the number of labour force participants – employed plus unemployed – expressed as a percentage of the population 15 years of age and over. Participation rates follow the same trends as employment – typically they are low when employment is falling, and vice-versa. Historically, the Northwest's participation rates have remained relatively similar to the province at around 65 to 70 percent, but when employment began to decrease in 2004, participation followed suit. From 2005 to 2013, participation levels in the Northwest have been lower than provincial and national levels. As of 2013, the participation rate in Northwestern Ontario was 63.5 percent, which was 3 percent lower than both Ontario and Canada.

Figure 5. Participation Rate



Source: Statistics Canada, CANSIM Table 282-0055, Labour Force Survey estimates (LFS)

The unemployment rate is another commonly used indicator to determine the health of the labour market. However, solely relying on this indicator can be misleading because “a laid off manufacturing worker who has given up hope of ever finding another job is not counted in the unemployment statistics, so an economy with a high number of discouraged workers could have a misleadingly low unemployment rate. Conversely, an economy where people are optimistic they can find work could have a deceptively high rate of unemployment” (Moffatt, 2014).

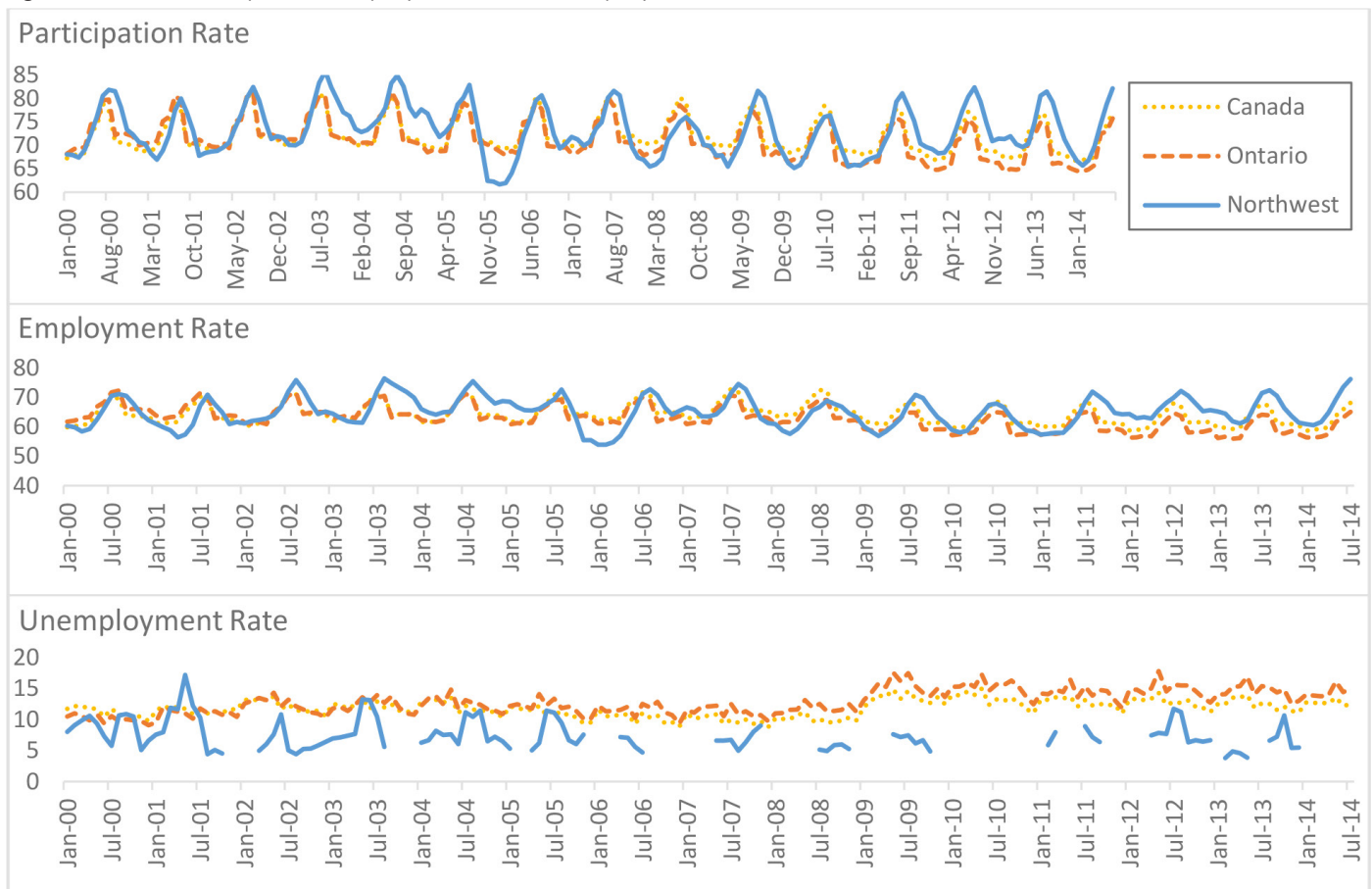
Historically, the Northwest's unemployment rate has followed a relatively similar pattern to that of Ontario and Canada. As of 2013, the unemployment rate in Ontario was 7.5 percent, followed by 7.2 percent in the Northwest and 7.1 percent in Canada.

However, given that employment levels in the Northwest have been lower than Ontario and Canada since 2005 (Figure 3), one would expect unemployment in the region to be higher than in Ontario and Canada during this period – i.e., employment and unemployment should be moving in opposite directions; when employment is low, unemployment is high. This, however, is not the case, due to the region's lower participation rate during the same period (Figure 5). Since the number of individuals in the Northwest's workforce has been consistently lower than Ontario and Canada, it explains why the unemployment rate has been roughly the same. Given these characteristics of the regional labour market, solely using unemployment rates to determine the health of the labour market can be misleading.

Youth Labour Market

In Figure 6, monthly labour force characteristics for youth⁴ in the Northwest are compared to Ontario and Canada from 2000 to 2014. There are some positive signs. In recent years youth participation and employment rates have been slightly higher than provincial and national levels. Additionally, youth unemployment in the region has generally been lower than in Ontario and Canada⁵. These trends differ from the labour market in the Northwest as a whole, which has experienced relatively lower employment and participation rates since 2005.

Figure 6. Youth Participation, Employment and Unemployment



Sources: Statistics Canada, CANSIM Table 282-0001, Labour Force Survey estimates (LFS); Statistics Canada, Custom Tabulation

There are some positive signs. In recent years youth participation and employment rates have been slightly higher than provincial and national levels. Additionally, youth unemployment in the region has generally been lower than in Ontario and Canada.

⁴ Youth are defined as individuals between the ages of 15 and 29.

⁵ Note that broken line segment for unemployment rate indicates data that has been suppressed by Statistics Canada.

Since 2001, 15 to 29 year olds have faced negative net migration (i.e., out-migration) levels in the Northwest, while 20 to 24 year olds are contributing most to the decline. In 2013, there was a net decline of roughly 400 youth, the majority of which were 20 to 24 years old.

Figure 7a. Net Migration

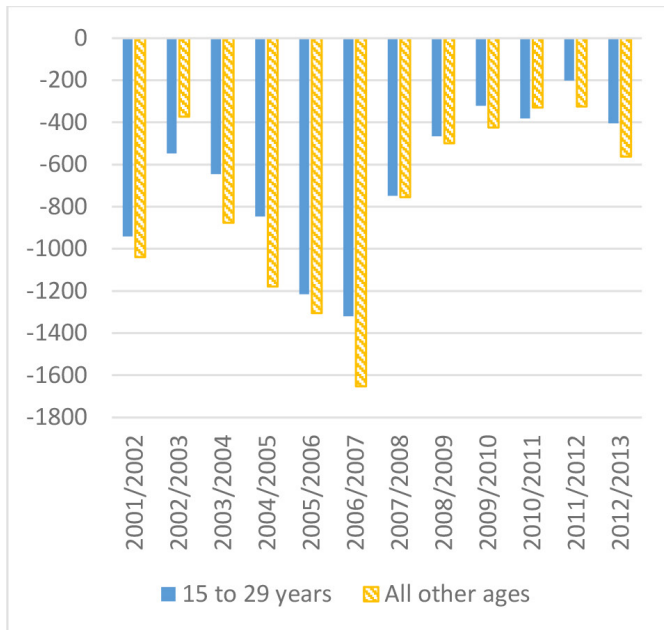
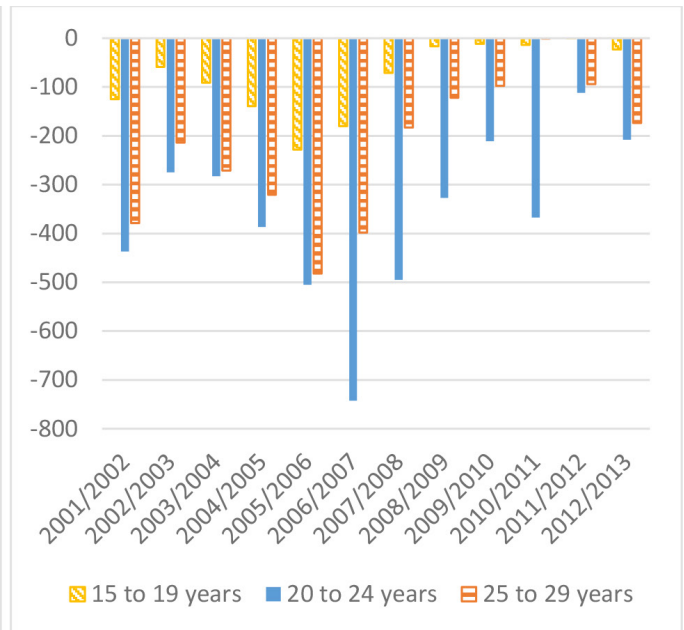
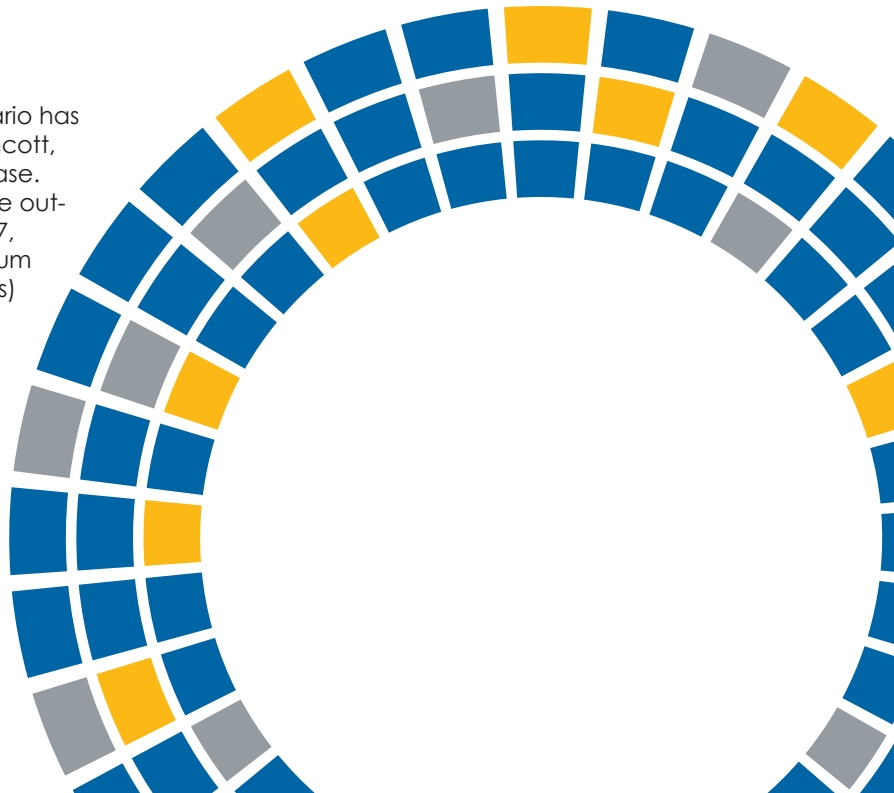


Figure 7b. Youth Net Migration



Source: Statistics Canada, CANSIM Table 051-0060, based on the Standard Geographical Classification 2011.

However, the youth labour market in Northern Ontario has historically suffered from youth out-migration (Southcott, 2007b). In the Northwest, this continues to be the case. Interestingly, the region has also faced considerable out-migration from the population in general. In Figure 7, regional net migration is calculated by taking the sum of international, inter-provincial (between provinces) and intra-provincial (between regions) migration. Since 2001, 15 to 29 year olds have faced negative net migration (i.e., out-migration) levels in the Northwest, while 20 to 24 year olds are contributing most to the decline. In 2013, there was a net decline of roughly 400 youth, the majority of which were 20 to 24 years old. The prevalence of youth out-migration contributes to a decline of both individuals participating and not-participating in the workforce, and thus the overall youth population.



Part Two

Labour Market
Structure

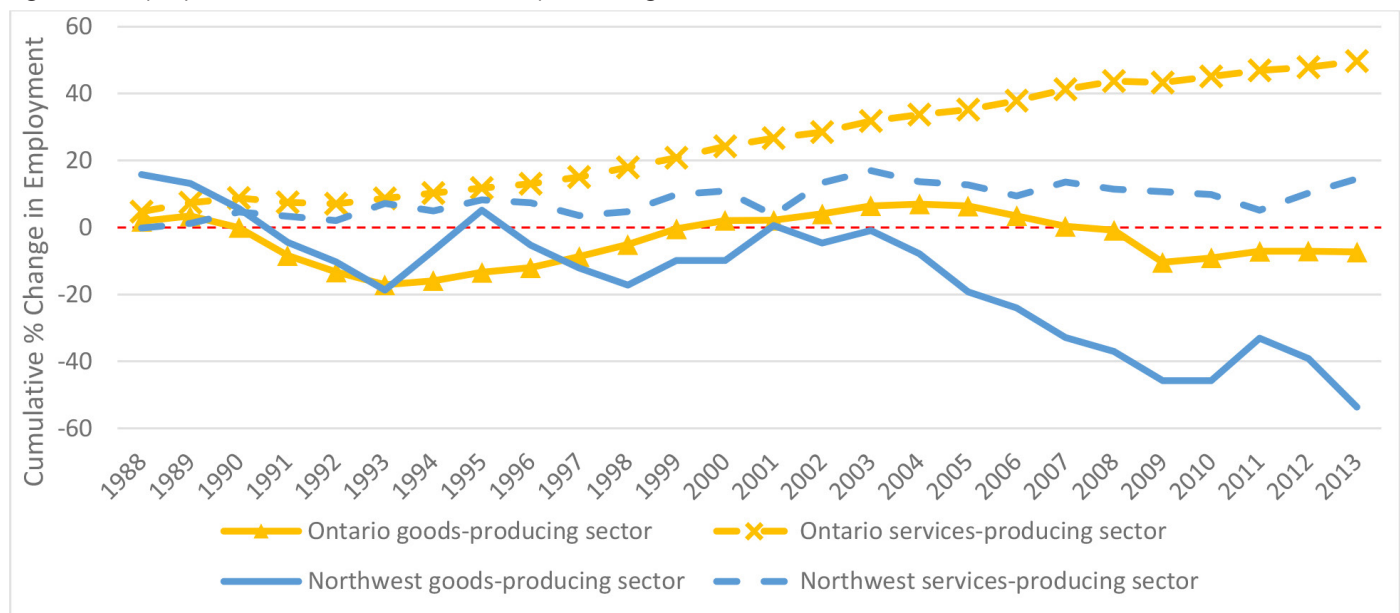
Goods-producing Sector

Starting in the 1870's, employment in Northern Ontario consisted in large part of blue-collar jobs in the resource-based, goods-producing industries – railways, forestry and mining. Northern Ontario's development over time, however; was very unique from other regions who sought growth in agricultural development and "competitive" capitalism (Southcott, 2013). Instead, "almost all of northern Ontario's communities were created by large resource- or transport-based corporations, often in partnership with the provincial government to extract natural resources for use elsewhere" (p. 16). This system of twentieth-century industrialism is so engrained in Northern Ontario's labour market that any diversification or transition into other economic systems is a difficult process.

Fast forwarding ahead to the late 1980s, Southcott (2013) explains that the primary forestry and mining industries "were concentrating on labour-saving technologies to lower production costs in attempting to compete in an increasingly globalized market place" (p. 17). This transition contributed in large part to declining employment levels in traditional blue-collar industries in both Ontario and Northwestern Ontario (as shown within the goods-producing sector in Figure 8).

Northwestern Ontario's employment in the goods-producing sector appeared to show some signs of recovery until 2003-2004. As noted earlier, this date was a key turning point in the Northwest's employment market. In contrast to the relatively small decreases that Ontario faced in their goods-producing sector during this period, the Northwest experienced massive declines in employment. From 2003 to 2013, employment in the goods-producing sector decreased by over 43 percent, from 30,200 jobs to 17,100 jobs. During the same period, overall employment in the province's goods-producing sector also experienced a decline, however; the magnitude of decline in the Northwest region was considerably larger.

Figure 8. Employment in Goods- and Services-producing Sectors, Ontario and Northwest Ontario

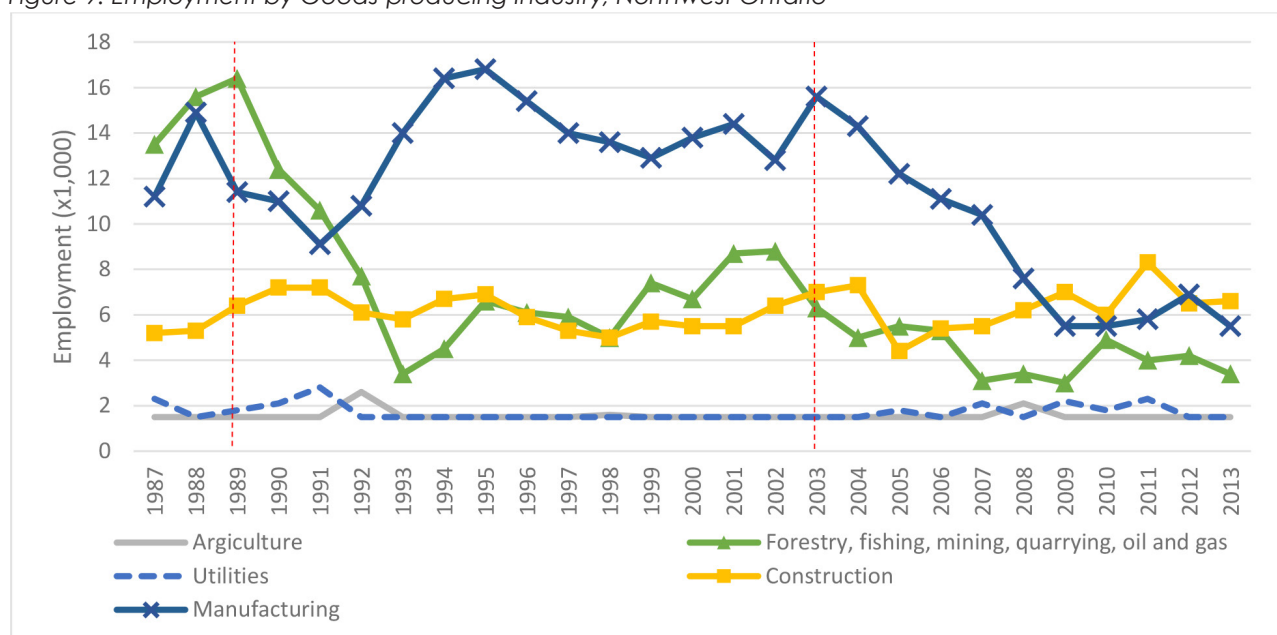


Source: Statistics Canada, CANSIM Table 282-0061, Labour Force Survey estimates (LFS)

There are some important trends to note when breaking down the Northwest's goods-producing sector by each industry⁴ (Figure 9). From 1989 to 1993, employment in Northwestern Ontario's primary industries (categorized as forestry, fishing, mining, quarrying, oil and gas) declined by almost 80 percent, from 16,400 jobs to 3,400 jobs. During this 4-year period, the region's primary industries went from employing 15 percent to 3 percent. Southcott (2013) explains that the decline in employment during this period was part of the industries strategy to remain competitive by investing in labour-saving technologies to lower costs. Employment in the region's primary industries have never recovered since.

4 Note that employment figures for agriculture and utilities industries that are less than 1,500 have been suppressed by Statistics Canada. As such, all suppressed values are assumed their upper bound of 1,499, while recognising that the actual number employed for suppressed years is somewhere between 0 and 1,499.

Figure 9. Employment by Goods-producing Industry, Northwest Ontario



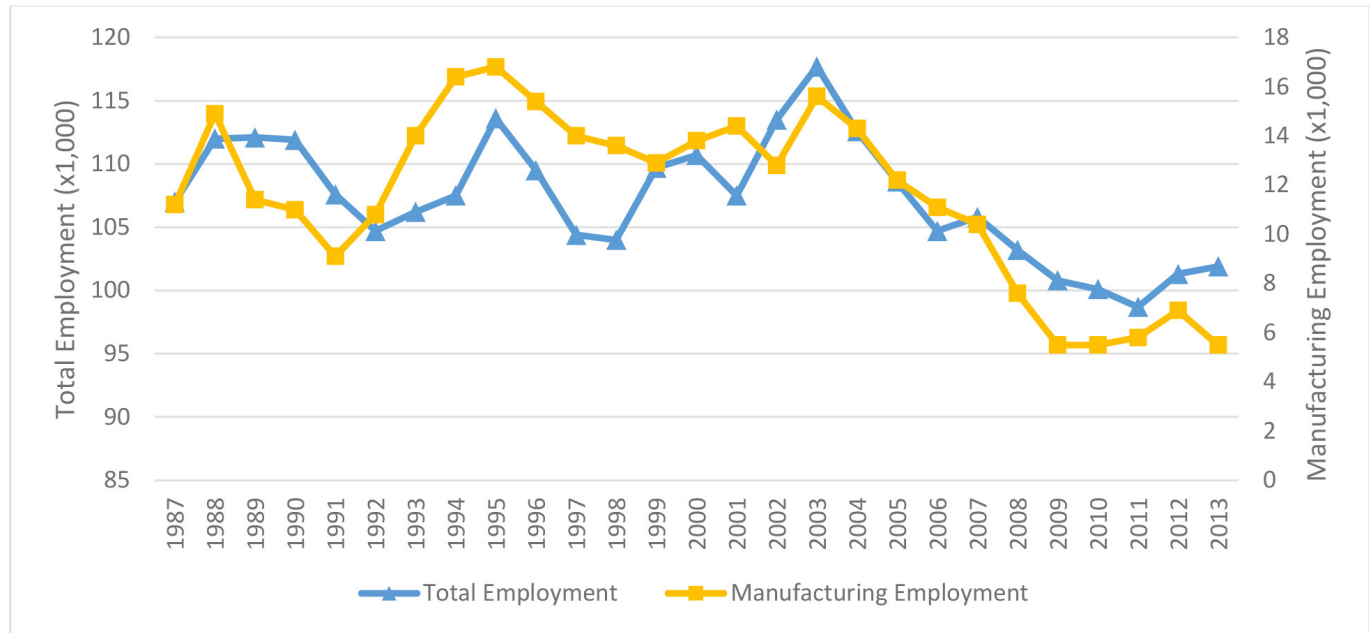
Source: Statistics Canada, CANSIM Table 282-0061, Labour Force Survey estimates (LFS)

Manufacturing in the Northwest has also faced difficulties. From 1988 to 1991 manufacturing employment declined but subsequently recovered until it peaked in 1995. In 2003-2004, however, manufacturing in the region was hit particularly hard, and was, for the most part, responsible for the major decline in the region's goods-producing sector and total employment in general. From 2003 to 2009, employment in the Northwest's manufacturing industries declined by 65 percent, from 13.3 percent of total employment in the region (15,600 jobs) to 5.5 percent (5,500 jobs). As of 2013, employment in manufacturing made up 5.4 percent of total employment.

In 2003-2004, however, manufacturing in the region was hit particularly hard, and was, for the most part, responsible for the major decline in the region's goods-producing sector and total employment in general.

In the first section, it was identified that total employment in the Northwest had declined by 15,800 jobs between 2003 and 2013 (Figure 2). During the same period, 10,100 jobs were lost in manufacturing, and 2,900 lost in primary industries, which explains the weak and declining trends in the Northwest's employment market since 2003. Total employment levels in the Northwest appear to be largely dependent on, and dictated by, the growth of the region's manufacturing and primary industries. This conclusion is reinforced by superimposing total employment on manufacturing employment in Figure 10. The boom and busts in manufacturing appear to be highly correlated with the overall fluctuations of the employment market.

Figure 10. Total Employment vs. Manufacturing Employment, Northwest Ontario



Source: Statistics Canada, CANSIM Table 282-0061, Labour Force Survey estimates (LFS)

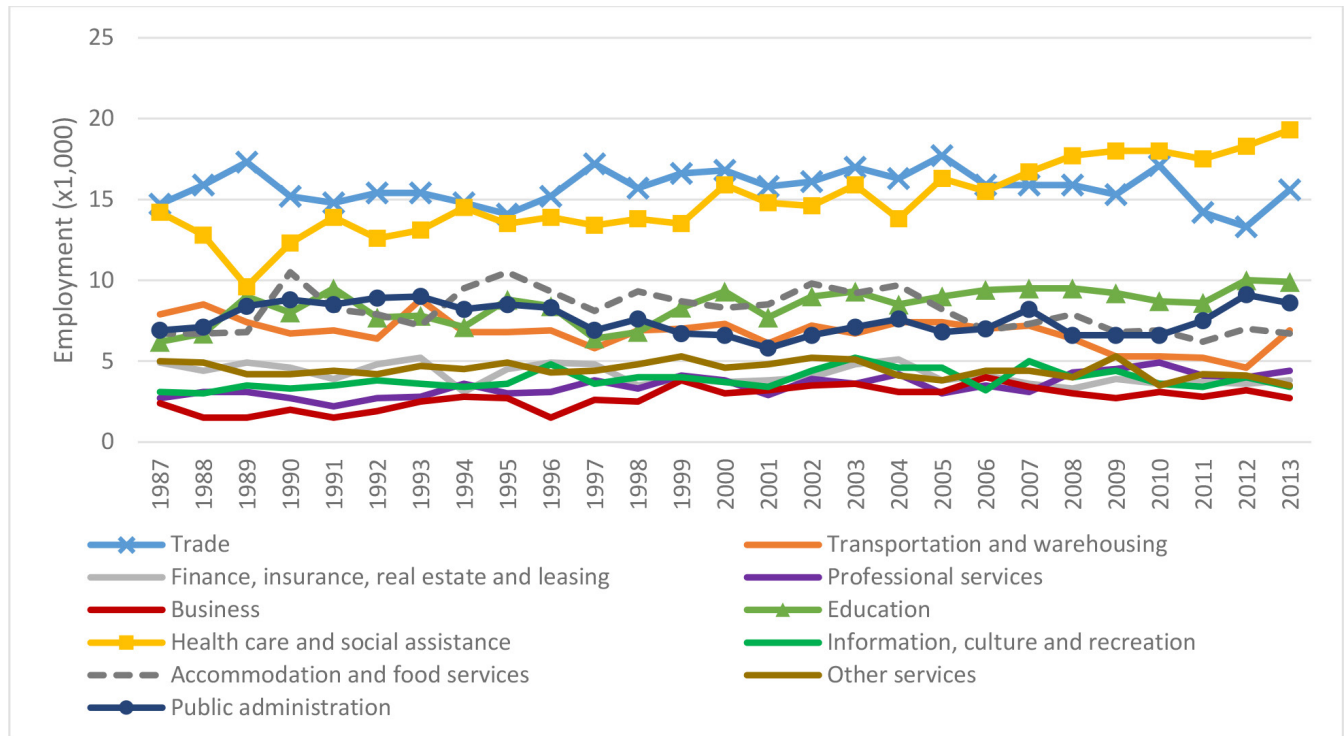


Services-producing Sector

Employment in the Northwest's services-producing sector has experienced modest growth, increasing by approximately 15 percent from 1987 to 2013 (Figure 8). However, relative to the province as a whole, the Northwest's services-producing sector has grown considerably slower.

Looking at the industry breakdown in Figure 11 there are some notable trends and characteristics. First, expansion of employment in health care and social assistance appears to be driving much of the growth in the services-producing sector. From 1987 to 2013, employment increased by 36 percent from 14,200 to 19,300. Second, employment in trade industries have been relatively constant since 1987. Generally, this industry has been the largest employer in the region, however; as of 2006, healthcare has surpassed trade as the largest employer. Third, there appears to be little, if any, long-term trending growth in all other service-producing industries. Lastly, employment in trade industries have remained relatively constant since the late 1980's. Given that trade is related to the goods-producing industries, it is interesting that employment in trade has not been subject to the large decline experienced in manufacturing and primary industries.

Figure 11. Employment by Services-producing Industry, Northwest Ontario



Source: Statistics Canada, CANSIM Table 282-0061, Labour Force Survey estimates (LFS)

Employment growth in the services-producing sector appears to be largely driven by the expansion of employment in healthcare and social assistance, which raises concerns about the sustainability of health care in the Northwest. Demand for employment in the health care industry is likely to continue growing given an aging population that is driven by baby boomers who are growing older, declining fertility rates and increasing life expectancy. Simultaneously, Northern Ontario is facing a declining tax base due to youth and young-adult out-migration, putting further strain on the availability of resources to support growing costs.

Since employment in the services-producing sector has remained relatively constant over time, aside from healthcare, it reinforces the notion that regional employment is dependent on manufacturing and primary industries.

Distribution of Employment

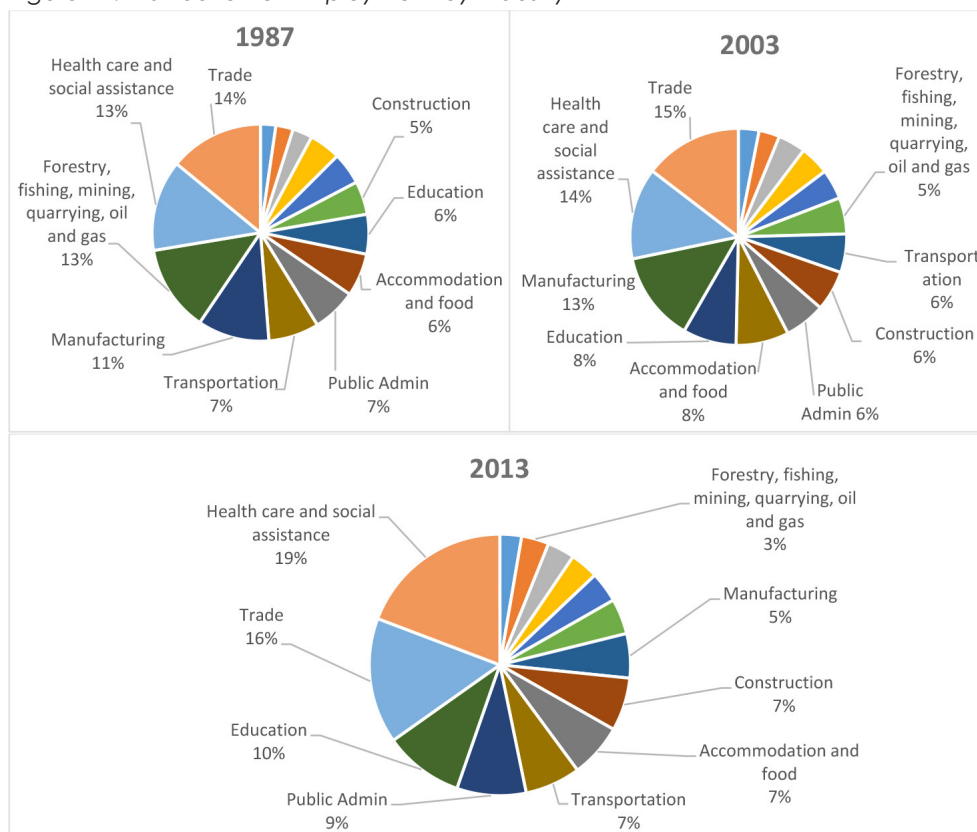
As a share of total employment in Northwestern Ontario, the goods-producing sector employed 30 percent of workers in 1987, which dropped to 26 percent in 2003 and 17 percent in 2013. As such, the services-producing sector has increased its employment share from 70 percent to 83 percent from 1987 to 2013.

Figure 12 illustrates the distribution of employment by industry in 1987, 2003 and 2013 to show the change in employment shares over time. The trade and healthcare and social assistance industries have remained the top two employers since 1987. The primary industries, forestry, fishing, mining, quarrying, oil and gas, and manufacturing industries were the third and fourth largest employers in 1987, respectively. By 2003, manufacturing was still strong, however; primary industries experienced a decline. Finally, in 2013, employment shares in both manufacturing and primary industries had downsized considerably, making up 5 percent and 3 percent of total regional employment, respectively.

The third and fourth largest industry employers in 2013 were education and public administration, growing from eighth and sixth place respectively. Interestingly, neither of these industries experienced much employment growth in real terms from 1987 to 2013, rather they only became proportionately larger due to the decline of employment in manufacturing and primary industries. As a result, in 2013 three of the top four employment industries were in the public sector, which may be interpreted as public sector dependence.

Given that, a) the Northwest's services-producing sector (excluding health care) has remained relatively constant since 1987 and b) employment growth (or lack of) in manufacturing and primary industries have been largely responsible for the fluctuations in the regional labour market, employment in the Northwest is largely dependent on, and dictated by, these two industries. In other words, when these industries are not employing a large portion of people, the region appears to have weak employment levels. There are no other industries that fill the void when employment in manufacturing and primary industries are in a slump, giving the appearance that public sector industries, which have had constant growth since the 1980's, are dominating the labour market in proportional terms.

Figure 12. Distribution of Employment by Industry



Source: Statistics Canada, CANSIM Table 282-0060, Labour Force Survey estimates (LFS).

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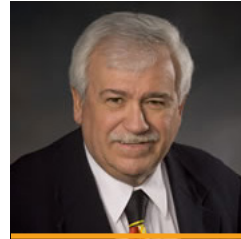
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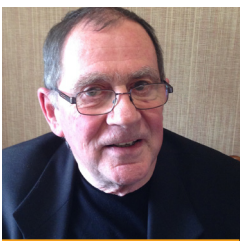
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Who We Are

Internally, Northern Policy Institute seeks to be as “flat” as possible with much of the work contracted out to experts in the fields under consideration. This approach avoids the risks associated with large bureaucratic organizations. It also allows Northern Policy Institute to flexibly respond across a wide range of issues while also building up in house and regional expertise by matching bright young minds on temporary placements and project specific work with talented experts who can supply guidance and coaching.

Some of the key players in this model, and their roles, are as follows:

Board: The Board of Directors sets strategic direction for Northern Policy Institute. Directors serve on operational committees dealing with finance, fundraising and governance, and collectively the Board holds the CEO accountable for achieving our Strategic Plan goals. The Board's principal responsibility is to protect and promote the interests, reputation, and stature of Northern Policy Institute.

CEO: Recommends strategic direction, develops plans and processes, and secures and allocates resources to achieve it.

Advisory Council: A group of committed individuals interested in supporting, but not directing, the work of Northern Policy Institute. Leaders in their fields, they provide advice on potential researchers or points of contact in the wider community.

Research Advisory Board: A group of academic researchers who provide guidance and input on potential research directions, potential authors, and draft studies and commentaries. They are Northern Policy Institute's formal link to the academic community.

Peer Reviewers: Ensure specific papers are factual, relevant and publishable.

Authors and Research Fellows: Provide independent expertise on specific policy areas as and when needed.

Standing engagement tools (general public, government stakeholders, community stakeholders): Ensure Northern Policy Institute remains responsive to the community and reflects THEIR priorities and concerns in project selection.

To stay connected or get involved, please contact us at:

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POLICY INSTITUTE

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DU NORD

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