Parkland College

Your Answer...

Needs Assessment

12-13

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Parkland Regional Needs Assessment Summary

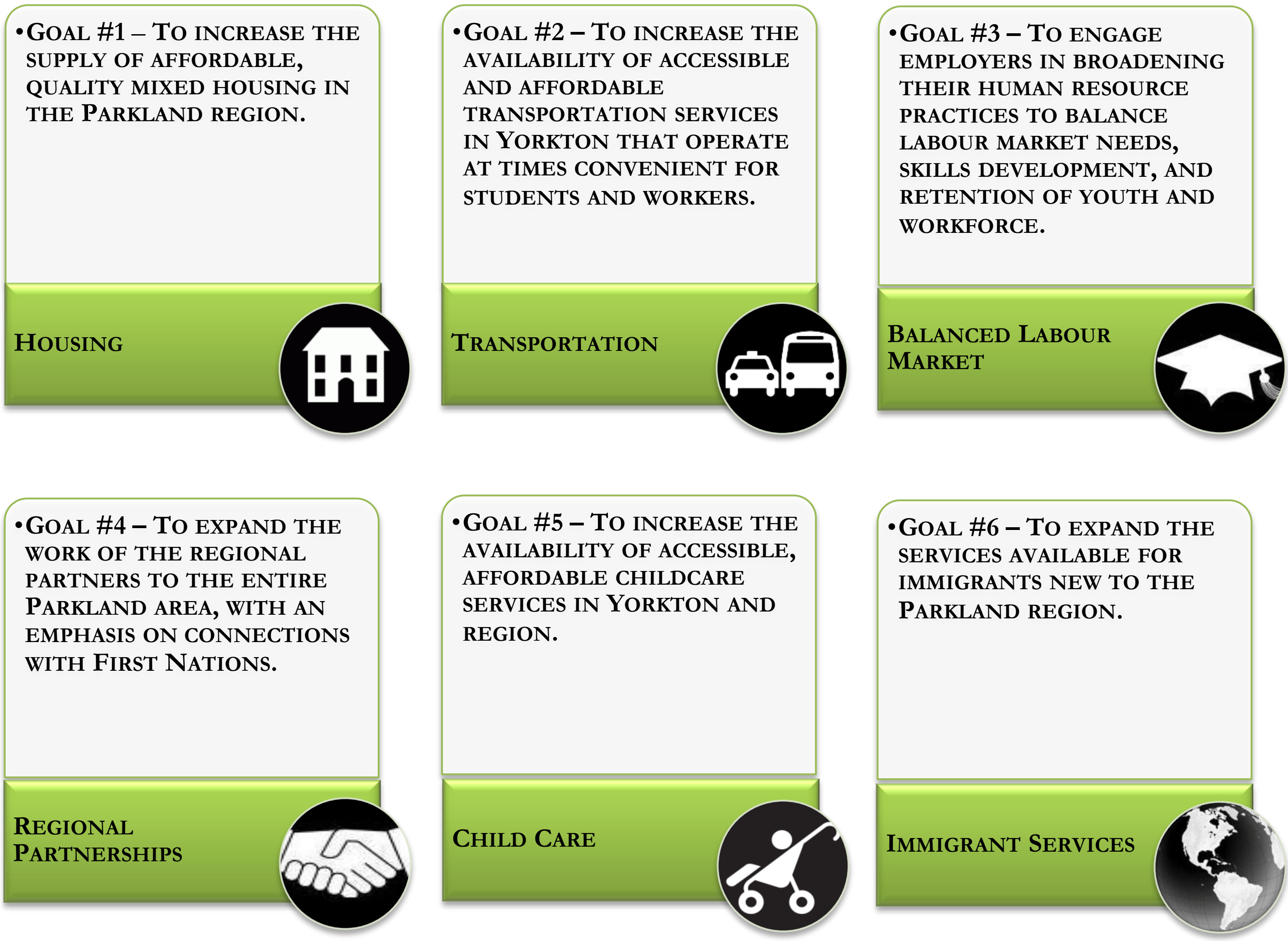
Parkland College develops an annual Regional Needs Assessment with the support and cooperation of local businesses, community based organizations, and governmental departments.

All of the partners in the Regional Needs Assessment focus on community development, training, education and/or employment in one way or another. Together the partners provide a comprehensive array of training and employment programs available in the region.

The availability of supplemental education, training, and employment is crucial as Saskatchewan experiences an unprecedented economic expansion. An analysis of the Parkland area shows that the region is in dire need of skilled workers in order to sustain this growth. Thousands of qualified workers will be needed not only to fuel the progress, but also to replace an aging workforce. The regional partners, in their plan for the future, decided to focus the 2012-2013 Regional Needs Assessment report on trades training in relation to a balanced labour market.

The partners in this Regional Needs Assessment are working to achieve the identified goals. So are numerous other groups in the Parkland region. These community and government organizations recognize that proper training of workers is critical to the province's continued success. The goals below are the most significant ongoing community goals. It will take a step-by-step, year-by-year approach to achieve improvements on these goals.

Figure 1: Parkland Regional Needs Overview



The Regional Needs Assessment process will focus on one goal each year for the next six years to highlight the specific goal and identify the progress being made in the region.

The 2012-2013 Regional Needs Assessment will focus on the goal of **engaging employers in broadening their human resource practices to balance labour market needs, skills development, and retention of youth and workforce.**

"To engage employers in broadening their human resource practices to balance labour market needs, skills development, and retention of youth and the workforce."

Regional Needs Assessment focused issue 2012-2013

BACKGROUND

In 2011, the population of Saskatchewan reached an all-time high of 1,033,381. That number represents a change of 6.7 per cent from 2006, compared to the national average of 5.9 per cent.

Yorkton was ranked sixth among Saskatchewan census subdivisions in terms of population. As well, Canora, Esterhazy, Kamsack, and Melville all reported positive population increases from 2006 to 2011. However, the Parkland Region's population continues to be significantly older than the provincial average; it can be appropriately described as the oldest in the province.

But Saskatchewan as a whole still has the greatest percentage of youth under the age of 20. Young people are our competitive advantage for the future, and will in fact be a major part of the engine that drives the provincial economy. According to Enterprise Saskatchewan, over 70 per cent of the province's estimated 87,600 employment opportunities between 2007 and 2012 are expected to be driven by retirement and growth. We need our youth to sustain our communities.

Ninety per cent (90%) of new jobs will require a minimum of a high school diploma. The majority of future jobs will require management or post-secondary education. There will be very few good employment opportunities for those with less than a high school diploma. Coincidentally, Saskatchewan currently has the second lowest percentage of workers with a post-secondary education.

Saskatchewan is facing a skill shortage that is impacting the success of local businesses. People are moving to larger centers to access training and advance their careers. Most of those who leave do not return. This has a major impact on both the quality of life and viability of local businesses. The lack of advanced skilled employees is a major barrier to economic growth and development.

Labour shortages have been projected across the province in 2012 in all but seven out of 35 trades categories. By 2012 the supply of skilled tradespersons in 11 trades is expected to hit the "severe shortage" classification. In 2009 the Yorkton-Melville area experienced a "shortage" or "severe shortage" in close to 90 per cent of the recognized trades.

The Saskatchewan Construction Association estimates a required 7,800 new workers in the Construction Industry by 2016. Likewise, the mining industry in the province is projecting the need for an additional 15,100 workers by the year 2021. The oil and gas industy is also projecting strong employment growth in Saskatchewan over the next decade driven by both attrition and growth in industry activity.

Combined with the magnitude of planned investment in the SEER region over the next decade, the demand for skilled labourers will only grow. In this region, the Potash Corporation of Saskatchewan's $2.8 billion expansion at Rocanville and Mosaic's $1.6 billion expansion at Esterhazy account for 85 per cent of the total value of all major projects in SEER.

WHAT PARKLAND COLLEGE IS DOING

One of Parkland College's main mandates is to support regional economic activity by serving the training needs of the region. Currently the College has no industrial or classroom space available during daytime hours in Yorkton. There were more than 85 students on waitlists for advance skilled programs for the 2010-2011 academic year. If space is not created in the region, students will continue to leave rural Saskatchewan for larger urban centers.

In 2009, Parkland College began exploring the potential for a Trades and Technology Centre in Yorkton. The Centre will have the capacity to train over 350 new full time equivalent students per year in programs that are in demand from local and regional businesses and industries. In addition, it creates the opportunity to meet local business training requirements at home.

The expanded program options and just-in-time training for students and businesses translates into better employment opportunities and higher skilled employees to support regional and provincial growth. This has the potential of reducing unemployment and increasing average incomes.

Figure 2: Proposed Trades and Technology Centre

The Trades and Technology Centre will enhance rural and remote program delivery through online distance learning – giving access to the right education for all communities. Online supported learning will give students the opportunity to participate in post-secondary training at or closer to home, allowing them to remain active in their own communities.

A study commissioned by Parkland College in 2009 shows that the accumulated skills of past and present Parkland students in the local workforce translated to $24.7 million in added income in the previous fiscal year due to the higher earnings of students and the increased output of businesses.

The economic impact study concluded that for every dollar invested in Parkland College taxpayers see a 15 per cent rate of return on investment.

One of the most important findings of this study is that over 90 per cent of students trained through Parkland College remain in the province after graduation.

While the Trades & Technology Centre does represent a huge opportunity, the capital project proposal is still being negotiated with Ministry officials. No date has been offered for funding approval at this time.

The following programs have been identified as the initial programming offerings for the Trades and Technology Centre. The multi-purpose facility has been designed to accommodate changing needs for training within the region and positively contribute to the entire educational system in Saskatchewan.

PROGRAM AREA	CERTIFICATION ACHIEVED	GRADUATES PER YEAR	EXPECTED EMPLOYERS
Welding Level 1 and 2 Apprenticeship	SATCC certification	24	Leon's Manufacturing, Ram Industries, Mosaic, PCS, Babcock and Wilcox, Bridgeview Manufacturing, Richardson Oilseed, LDM, Goodman Steel, EMW, Truck Saver, Maki Services, Morris Industries, Logan Stevens, Parkland Welding and Machine, Yorkton Welding and Machine, Omar's Welding, Peebles Machine Shop, Castleton Industries
Introduction to Industrial Trades/Workplace Essential Skills	Parkland College Certificate of completion in partnership with SIIT	40	Corey Holdings, Parkland Overhead Door, Hudye Soil Services inc, Ledcor Tech, Leon's Manufacturing, Ram Industries, Mosaic, PCS, Babcock and Wilcox, Bridgeview Manufacturing, Richardson Oilseed, LDM, Goodman Steel, EMW, Truck Saver, Maki Services, Morris Industries, Logan Stevens, Deneschuk Homes, Grain Millers
Welding journey person upgrading	SIAST certificate	12	Leon's Manufacturing, Ram Industries, Mosaic, PCS, Babcock and Wilcox, Bridgeview Manufacturing, Richardson Oilseed, LDM, Goodman Steel, EMW, Truck Saver, Maki Services, Logan Stevens, Parkland Welding and Machine, Yorkton Welding and Machine, Omar's Welding Peebles Machine Shop, Castleton Industries
Construction Trades up-skilling	Courses chosen by industry	15	SR Construction, K&K Construction, Weber Construction, Phase One Construction, Potzuz, Eagle Stone Contracting, Federowich Construction, DT Concrete, , Logan Stevens, Deneschuk Homes
Metal Trades up-skilling	Courses chosen by industry	45	Yorkton Metal Co, Yorkton Plumbing and Heating, Goodman Steel, EMW, Maki, Morris Industries, Leon's Manufacturing, Ram Industries, Mosaic, PCS, Babcock and Wilcox, Bridgeview Manufacturing, Parkland Welding and Machine, Yorkton Welding and Machine, Omar's Welding Peebles Machine Shop, Castleton Industries
Power engineering level 3 with lab	Level 3 certification	15	Mosaic, PCS, Babcock and Wilcox, Richardson Oilseed, LDM, SaskPower, Husky, Cameco, Areva, Sunrise Health Region, Grain Millers
Power engineering Level 4 with lab	Level 4 certification	12	Mosaic, PCS, Babcock and Wilcox, Richardson Oilseed, LDM, SaskPower, Husky, Cameco, Areva, Sunrise Health Region, Grain Millers
Enhanced Electrical Applied Certificate	Level 1 status in electrical (SIAST certificate)	12	Lilydale Foods, Big Sky, Corey Holdings, Mosaic, PCS, Yorkton Metal Co, Yorkton Plumbing and Heating, SR Construction, K&K Construction, Weber Construction, Phase One Construction, Potzuz, Eagle Stone Contracting, Federowich Construction, DT Concrete, Magna Electric, Deneschuk Homes, Grain Millers
PROGRAM AREA	CERTIFICATION	GRADUATES	EXPECTED EMPLOYERS

	ACHIEVED	PER YEAR	
Enhanced Carpentry Applied certificate	Level 1 status in carpentry (SIAST certificate)	12	Sveinbjornson Carpentry, K&K Carpentry, Beck Carpentry, Wahlstrom Carpentry, Hutton Carpentry, Deneschuk Homes, Corey Holdings,
Electrical Apprenticeship levels 1 and 2	SATCC certification	24	Lilydale Foods, Big Sky, Corey Holdings, Mosaic, PCS, Yorkton Metal Co, Yorkton Plumbing and Heating, SR Construction, K&K Construction, Weber Construction, Phase One Construction, Potzuz, Eagle Stone Contracting, Federowich Construction, DT Concrete, Magna Electric, Deneschuk Homes
Industrial Trades Up-skilling	Courses chosen by industry	10	Corey Holdings, Parkland Overhead Door, Hudye Soil Services inc, Ledcor Tech, Leon's Manufacturing, Ram Industries, Mosaic, PCS, Babcock and Wilcox, Bridgeview Manufacturing, Richardson Oilseed, LDM, Goodman Steel, EMW, Truck Saver, Maki Services, Morris Industries, , Logan Stevens, Deneschuk Homes, Grain Millers
Boiler Firing Time for industry	Opportunity to get firing time to advance	12	Mosaic, PCS, Babcock and Wilcox, Richardson Oilseed, LDM, SaskPower, Husky, Cameco, Areva, Sunrise Health Region, Grain Millers
Crane and Hoist pre-employment	WTTI certification	12	Mosaic, PCS, Babcock and Wilcox, Richardson Oilseed, LDM, Logan Stevens, SR Construction, K&K Construction, Weber Construction, Phase One Construction, Potzuz, Eagle Stone Contracting, Federowich Construction, DT Concrete, Deneschuk Homes
Introduction to Mechanical Trades/Workplace Essential Skills	Parkland College Certificate of completion in partnership with SIAST	12	Jobsite Mechanical Service, One Earth Farms, Esterhazy Auto Service, Ficek Transport, RSC Equipment, Maple Farm, First Nation Bands, Young's Equip, Can-American Enterprises, Wynyard Equip Sales, Rocky Mountain Dealer, Penn-Truss Mfg, Maizis and Miller Consultants, Petrichuk services, Stan's Mobile Service, , Logan Stevens
Mechanical Trades up-skilling	Courses chosen by industry	20	EMW, Jobsite Mechanical Service, One Earth Farms, Esterhazy Auto Service, Ficek Transport, RSC Equipment, Maple Farm, First Nation Bands, Young's Equip, Can-American Enterprises, Wynyard Equip Sales, Rocky Mountain Dealer, Penn-Truss Mfg, Maizis and Miller Consultants, Petrichuk services, Stan's Mobile Service, , Logan Stevens
Combined Lab Tech	SIAST certification	12	Sunrise Health Region, Regina Qu'Appelle Health Region, Mosaic, PCS, Harvest Meats, Richardson Oilseed, LDM, Grain Millers
Pharmacy Tech up-skilling	SIAST certification	12	Sunrise Health Region, Regina Qu'Appelle Health Region, Rexall, Walmart, Shoppers drug mart, Loucks, Royal Drug Mart, Canora Pharmacy, Safeway Pharmacy, Pharmasave, Kamsack Family Pharmacy, Hearn's Pharmacy, Sherman's Drug Mart, Nobert Pharmacy

PROGRAM AREA	CERTIFICATION ACHIEVED	GRADUATES PER YEAR	EXPECTED EMPLOYERS
Computer Programmable Logistic Control (PLC)	Courses identified by industry	12	Morris Industries, Mosaic, PCS, Babcock and Wilcox, Richardson Oilseed, LDM,
Journey person upgrading tutorials	Tutoring services	12	3 Boyz Plumbing and heating, Leon's Manufacturing, Ram Industries, Mosaic, PCS, Babcock and Wilcox, Bridgeview Manufacturing, Richardson Oilseed, LDM, Goodman Steel, EMW, Truck Saver, Maki Services, Morris Industries, Logan Stevens, Deneschuk Homes
Safety Training	Recognized certificates such as confined space, WHMIS, First Aid CPR	2000	Corey Holdings, Parkland Overhead Door, Hudye Soil Services inc, Ledcor Tech, Leon's Manufacturing, Ram Industries, Mosaic, PCS, Babcock and Wilcox, Bridgeview Manufacturing, Richardson Oilseed, LDM, Goodman Steel, EMW, Truck Saver, Maki Services, Morris Industries, Jobsite Mechanical Service, One Earth Farms, Esterhazy Auto Service, Ficek Transport, RSC Equipment, Maple Farm, First Nation Bands, Young's Equip, Can-American Enterprises, Wynyard Equip Sales, Rocky Mountain Dealer, Penn-Truss Mfg, Maizis and Miller Consultants, Petrichuk services, Stan's Mobile Service, , Logan Stevens, Deneschuk Homes, Grain Millers

AREAS OF GROWTH

Achieving the broad goals will be a step-by-step process. The suggestions for change listed below will help to achieve these goals and create an environment that encourages progress.

- **Focus on the trades –** The trades provide a good income, and there will be openings in this area as many skilled tradespeople near retirement. Yet, there is a tendency to overlook these occupational areas. Actions that would enhance access to trade occupations include:
  - Work with employers to create more apprenticeship opportunities.
  - Offer 10-month trades courses in local communities. Presently, most of these courses are offered in Saskatoon, Regina, Prince Albert, and Moose Jaw.
- **Increase on-the-job training –** On-the-job training is the key to success in some jobs. On-the-job training means students are working with sophisticated, up-to-date equipment that educational institutions cannot afford. It also provides a forum to address workplace skills like punctuality, neatness, getting along with others, etc. The job, not the classroom, is the best place to address these workplace skills. Students sometimes say all the right things about these matters during training, but fail to follow through on the job.
- **Increase the educational levels of Aboriginal people –** Presently, Aboriginal people have lower educational levels than the population in general. This means a smaller Aboriginal labour force and fewer Aboriginal role models. Increasing educational levels would mean more skilled people in the labour market, more Aboriginal people with the skills and confidence needed for entrepreneurship, and more positive Aboriginal role models for young people.
- **Develop the economy –** Growth in the local economy will provide satisfying jobs for the newly educated labour force. Both the community in general and Aboriginal groups have roles to play in developing and expanding the economy of the Parkland region.
- **Change institutional service policies –** Some educational and service organizations have policies that prevent people from seizing the opportunities available to them. For example, an organization might have a policy that people must live in the region for six months before they receive services. It is important for institutions to keep pace with changes in their learner demographics.
- **Change provincial training policies –** The way that training is organized in this province sometimes creates barriers. For example, at the present, nurses can only do their practicum in a few very large city hospitals. This creates a barrier because some people, for family or financial reasons, cannot move to the big cities. Turning some of the large regional hospitals, like the Yorkton Regional Health Centre, into training hospitals for nurses would make nursing education more accessible.
- **Flexibility of training mode –** Adults require a training delivery method that fits their work, family, and other commitments. Program options can include part-time delivery, scheduling options, and technology-enhanced and individualized learning.

TAKING ACTION

Action is the natural outcome of any needs assessment. Once gaps in service are identified and the present and future needs of students, employees or employers are described, the next logical step is action.

Action involves using the strengths of individual partners and of the partners collectively to create programs or provide supports that will enable more citizens to successfully participate in education, training and/or the labour force.

Action also involves building on the partnerships, programs and activities that are going well, and using strengths and assets to fill gaps that stand in the way of full development of human capital.

Why Ask Partners to Identify Priorities, Goals and Actions?

- *In the 2012-2013 Regional Needs Assessment:*
- *Parkland College's managers identified priorities and issues for the College.*
- *The regional partners set goals for themselves, and identified actions for 2012-2013. They also described ways they might work together over the long term.*
- *This reflects one of the fundamental principles of community development, that community members are meaningfully involved in decisions that affect their lives.*
- *When individuals and groups participate in decisions that affect their lives and their work, they have more commitment to those decisions and a stronger sense of ownership. Thus, there is a stronger possibility that the decisions will be implemented.*

WORKING TOGETHER IN THE FUTURE

All partners see some type of ongoing collaboration among themselves and perhaps other regional organizations. Several partners suggested that this collaboration should extend to pooling of dollars and other resources as well as to sharing of ideas. Some partners suggested that a standing committee might grow out of the work done for the Regional Needs Assessment. Some partners indicated they like the strength-based approach, which is more encouraging than focusing on deficits. The main advantage of continued collaboration would be a much more planned approach to developing human capital.

Specific ideas about working together in the future include:

- **Expand the needs assessment partnership** to include more organizations that focus on education, training and employment.

- **Take a stronger regional approach** so that services are delivered throughout the region, not just in the larger centres. This might mean partnerships with organizations in communities like Canora and Kamsack.
- **Consider a joint approach to evaluation and accountability**. For example, the partners might develop a common evaluation framework and share information about best practices in evaluation and accountability. Evaluation and accountability are high priorities for all organizations that receive government funding – a priority that is likely to increase in the years ahead.
- **Work toward creating a mindset where collaboration is the norm** rather than, or in addition to, creating defined procedures for collaboration.
- **Involve Aboriginal organizations** more in future partnerships. This may mean taking new approaches to partnerships.
- **Collaborate on staff training and education.** The organizations involved in the Needs Assessment must invest in the people who work for them, as well as in members of the public. There will be a significant number of retirements over the next 10 years, and organizations must have a renewed labour force to take over and continue the work. There may be opportunities to share staff training programs.

The regional partners met in Yorkton on January 12, 2012 to review their future goals and actions. The changing demographics, economy, and labour market are impacting all communities in the region. The partners recognize the urgent need for action in response to issues related to housing, transportation, child care, and labour market shortages. Planning to address these issues may involve:

- Collaboration with many partners (institutions, organizations);
- Potential for new associations – or an association of associations;
- Research and further discussions about "social infrastructure planning";
- Building awareness among the business community and the public about the impact of strong economic growth on all citizens in the region;
- Flexibility in planning services, programs, and facilities to accommodate changing needs and circumstances.

The regional partners are already modeling social planning within the mandates of their organizations and through their regional partnerships. The report highlights wonderful examples of associations formed to improve quality of life for all citizens. Regional partners have a wealth of experience in partnering to achieve common goals. They are sources of:

- valuable information about the region;
- skill sets for long-term planning;
- expertise in labour market analysis, education and training;
- experience in working with cultural and ethnic diversity;
- support for special needs; and
- experience in finding creative solutions to facility issues.

All of these resources – and more – will be required to ensure that the region's social and community development grows together with economic and labour force development.

Overview of Regional Partners

The partners in the Regional Needs Assessment were:

- Career and Employment Services (a branch of Advanced Education, Employment and Immigration)
- City of Yorkton – Department of Economic Development
- File Hills Employment & Training Centre
- Good Spirit School Division
- Parkland College
- Saskatchewan Abilities Council – Yorkton Branch
- Saskatchewan East Enterprise Region
- Service Canada
- Ministry of Social Services
- Society for the Involvement of Good Neighbours (SIGN)
- Yorkton Housing Corporation
- Yorkton Tribal Council (YTC) Labour Force Development Program

Why Collect Information About the Regional Partners?

Data about the regional partners provides information about the education, training, and employment services the partners collectively provide. Considering these services in regard to present and potential students and employees, and in regard to the present and future labour market, allows the partners to identify:

- *Those groups of the population which are being well served by existing programs.*
- *Those groups of the population which are not able to take full advantage of existing programs because programs lack appropriate community supports or do not respond to their needs.*
- *The extent to which existing programs prepare students for the labour market of tomorrow.*
- *New programs and services, which might be implemented, to better prepare students for education and the labour market.*

Key points about the regional partners may be summarized as follows:

- Together, these regional partners offer a broad range of education, training, and employment programs. However, practical issues like lack of childcare and transportation, or unavailability of housing, sometimes prevent people from participating in education, training, and employment programs.

- The Parkland region has a history of working together. There are well-established procedures for collaboration and existing organizations that facilitate cooperation.

- The majority of the partner organizations consider their staff to be a core strength and an important asset to their organization.

- All of the partners have similar broad goals – to assist people to be more independent and productive, and to create a healthy economy and self-sufficiency for all citizens in the Parkland region.

PROGRAMS AND SERVICES OF REGIONAL PARTNERS

Developing human capital in the Parkland region is a multi-faceted process. Each person has a different background, different abilities and interests, and different goals. No single organization can meet the needs of all Parkland citizens, but together the needs assessment partners provide programs and services that respond to a wide range of needs. The services and programs offered by the needs assessment partners are detailed below.

Figure 3: Programs and Services of Regional Partners

ORGANIZATION	PROGRAMS / SERVICES
Career and Employment Services	Career and Employment Services are supportive of the overall labour market and responsive to the needs of employers, job seekers and learners in the regional economy. Career and Employment Services provides employment programs for EI recipients and low income people. Programming is targeted to individuals who are unemployed, underemployed or underrepresented in the labour market. CES provides services directly or through contracted third parties to individuals including: • Access to resource centres providing job search tools, labour market information, resource materials and personal assistance • Career planning • Education and skills training • Access to Employment Programs • Income support through Provincial Training Allowance, Student Financial Assistance and Skills Training Benefit CES provides services to employers including: • SaskJobs.ca – a website that connects job seekers and employers • Providing labour market information • Connecting employers to other service providers
City of Yorkton – Department of Economic Development	• Position the City of Yorkton as a key and highly desirable place for business and new investment; • Attract businesses and skilled labor force to relocate to Yorkton; • Support existing businesses for their retention and expansion; • Encourage partnerships of community organizations/groups to foster the process of economic development; • Support efforts of regional and community groups for the economic prosperity of East Central region.
File Hills Employment & Training Centre	•
Good Spirit School Division	• Programs for 6,200 students from Pre-Kindergarten through Grade 12; • Operates 28 schools in 17 communities; • Programs offered follow the core curriculum as set out by the Ministry

	of Education; • Alternate, modified and locally developed courses are offered at the secondary (Grade 10-12) level; • The breadth of program offerings differs throughout the school division; • Provide student transportation services to over 2900 students while covering over 20,000 kilometers on a daily basis; • Works cooperatively with other humans service providers to meet student needs; • Employs over 900 staff to deliver services to students in the area.
Parkland College	• Training and education programs including university, technical and trades instruction, as well as adult basic education; • Partnerships with employers and industry to prepare the labour force; • Career and academic counselling; • Services: Technology Enhanced Learning, Workplace Essential Skills, computer training, testing and assessments.
Saskatchewan Abilities Council – Yorkton Branch	• Work with people of varying abilities to enhance their independence and participation in the community through vocational, rehabilitation, and recreational services; • Employment services including: vocational evaluations, vocational counseling, job readiness training, job placement, job accommodations, job coaching and ongoing employment support services to the people of the Parkland region including immigrants. • Avocational services (programs to improve people's quality of life); • Accessibility services (e.g., equipment and wheelchair buses); Direct employment for people with disabilities in recycling programs.
Saskatchewan East Enterprise Region	• The 4 Strategic directions of the ERs are: 1. Building regional economies. 2. Fostering a culture of enterprise and innovation. 3. Building on competitive advantage. 4. Engaging leadership and effective governance. • There is a shift from community development to building upon business, enterprise, innovation, and sector development. • Focus upon global economic influences.
Saskatchewan Indian Institute of Technologies – Yorkton Industrial Career Centre	The mission of the Yorkton Industrial Career Centre is to develop skills and provide an opportunity for First Nation/Aboriginal and others to establish careers in the construction industry (and other industrial occupations) by providing links to employment and access to training and trade certification. Our services include: • Job coaching • Career planning/counselling • Skills development through certified training • Indenturing • Driver training • Construction Safety Training System (CSTS)

	• Linkages to employment
Service Canada	• Programs for youth, ages 15 to 30, who are out of school and who have barriers to employment. Priority given to proposals that address the needs of aboriginal youth entering the labour market; • Programs for persons with disabilities to assist them in entering the labour market; • Programs for students, including the Canada Summer Jobs program and the Service Canada Centres for Youth, to assist students in finding summer employment; • Programs to address homelessness in the community; • Canada Pension Plan • Old Age Security; • Disability Pensions • War Veterans Allowance • Guaranteed Income Supplement • Employment Insurance Benefits; • Career Transition Assistance; • Social Insurance Numbers; • Pleasure Craft Licenses; • Passport Applications; • Apprenticeship Incentive Grants; • Student Loans; • Federal Student Work Experience Program • Canada Education Savings Grant; • Canada Child Tax Benefit • Universal Child Care • Canadian Forces Recruiting; • RCMP Recruiting; • Common Experience Payment. • Registered Disabilities Savings Plan; • Wage Earner Protection Plan; • Working Income Tax Benefit; • Work Sharing; and • Western Hemisphere Travel Initiative
Social Services	• **Child Protection Services:** The Ministry of Social Services is given the authority by *The Child and Family Services Act*, to provide child protection services to children who are abused physically, sexually, emotionally, and neglected. • **Foster Care:** Foster care provides children a warm and safe environment where they get the care, supervision, support and guidance they need during the time they must live away from home • **Community Based Services:** Over $90 million per year is paid to CBOs to deliver services. • **Community Living Division:** Community Living delivers its programs and services primarily through an extensive system of community-based social, residential, vocational and early childhood agencies. It works in

	partnership with provincially-based representatives and advocacy organizations. • **Housing:** Saskatchewan Housing provides services for low to moderate-income households who could not otherwise afford adequate, safe and secure shelter. • **Income Assistance:** Financial assistance to help low-income families move out of poverty is available through income assistance programs. The following programs are available to support low-income families in Saskatchewan: • Child Care Subsidy; • Discount Bus Pass Program; • Food Security; • Sask. Employment Supplement; • Seniors Income Plan; • Sask. Rental Housing Supplement; • Sask. Assistance Program; • Transitional Employment Allowance.
Society for the Involvement of Good Neighbours (SIGN)	• Development and delivery of programs for socially and economically disadvantaged individuals, families, and for people with cognitive, psychiatric, and physical disabilities; • Partnerships and provision of space for other community organizations; • Administration and/or assistance with development of programs for other community groups; • Provision of opportunities for student work experience and practicum placement.
Sunrise Public Health	• Public Health is designed to protect, promote and restore the people's health by using a Population Health Promotion framework which looks at what determines health and takes action on these determinants to reduce risk factors and ultimately increase health in a whole community or population. The approach is socio-environmental approach confronting the root cause of illness which means creating environments for people to be healthy. • Program areas: • Medical Health Officer • Public Health Inspection • Public Health Nursing • Dental Health • Community Education/Population Health Promotion • Public Health Nutrition • Diabetes Education • Podiatry Services • Hearing Aid Program
Yorkton Housing Corporation	• Provides housing to low income adults: 70 suites for low income seniors (60+) and 40 suites for low income adults

Yorkton Tribal Council (YTC) Labour Force Development Program	• Financial assistance for Treaty First Nations Individuals for training; • Employment and Career Counselling services open to the general public; • Resume writing services, job placements, set partnerships; • Internet service for job search; • Group counselling / one-to-one basis.

PROGRAMMING GAPS

Some of the partners emphasized that training, education, and employment placement programs are important, but that by themselves are not sufficient to fully develop the potential of all people in the Parkland region. Some people are dealing with practical issues like childcare, transportation, and housing that make it difficult to participate in these programs. Other people have personal/family issues like alcoholism, family violence, abuse or general hopelessness that keep them so preoccupied they are unable to focus on education or employment. Although some of the partners address these issues in a peripheral way, none focuses on them intensively. Thus, there are barriers to education and employment that are not being fully addressed.

STRENGTHS OF REGIONAL PARTNERS

COMMUNITY STRENGTHS

Strengths of the Parkland region as a whole include:

- **A history of working together** in the Parkland region. There are well-established procedures for working together, and existing organizations that facilitate cooperation. All partners participate in various types of collaborative activities.
- **The location of the Parkland region**. Yorkton and area is one of the largest trading areas in Saskatchewan. It's a long distance to travel to Saskatoon, Regina, or Brandon, so people in the area come to Yorkton.
- **Amenities in the Yorkton area** that draw people. These include good shopping, the regional health complex, the casino, and an infrastructure to host sports and cultural events.
- **The area's agricultural base**. Agriculture is an important driver in the economy and creates opportunities for many spin-off businesses. Farmers are expressing optimism for a variety of reasons. They see opportunities as a result of ethanol/bio fuels production, public demand for new products, and increased demand for product.

- **The area's capacity for growth**. There is room and opportunity for both population growth and industrial growth. Currently, the region is experiencing strong economic growth. A few of the reasons cited for optimism about increased economic activity are:

  - Recent reversal from net migration outflow to inflow in province;
  - Increasing housing starts and housing renovations;
  - Several major projects in region.

PARTNERS' STRENGTHS

The strengths of individual partners are listed in Figure 4. While strengths vary from one partner to another, several identified their staff and their community partnerships as strengths. This suggests that a solid foundation for future partnerships and collaboration already exists.

Figure 4: Partner Organization Strengths

ORGANIZATION	STRENGTHS
Career and Employment Services	• Flexible and responsive to changing labour market conditions; • Demonstrated expertise in contract management; • Client focused approach to service delivery; • Access to current labour market information; • Partnership development; • Solid infrastructure as CES is part of a provincial delivery system; • Strong financial management practices and accountability for results.
City of Yorkton – Department of Economic Development	• Focus on enhancement of economic development activities beneficial for Yorkton and adjacent rural municipalities; • Close working relationship with the city departments, Chamber of Commerce and other community groups/organizations.
File Hills Employment & Training Centre	•
Good Spirit School Division	• Provides services to meet the needs of a diverse student population; • Student enrollments are steadily increasing; • Inclusive organization with a mandate to serve all students that meet the age requirements set out in the Education Act, 1995; • Works extensively with partners in a number of collaborative ventures; • A strong set of values as identified by the school division's foundational statements.
Parkland College	• Staff – good multi-disciplinary team with background and expertise in a wide variety of areas; • Leadership – leaders who look for and seize opportunities; • Strong financial management and accountability;

	• Partnerships and credibility in the community.
Saskatchewan Abilities Council – Yorkton Branch	• Staff who are sensitive to community needs and are capable of working independently; • Organizational culture of collaboration; • Administrative expertise; • Good knowledge of and relationships with human services organizations and community based agencies in Yorkton; • Availability of facilities with a capability for a wide variety of uses.
Saskatchewan East Enterprise Region	• Region encompasses a broad distribution with population at approximately 66,020 and area of approximately 29,500 square km; • A pool of experience and expertise available with 5 REDAs joining forces. In addition, there is representation from business and industry, community and market based industry. Mix of skill sets and representation will benefit the development of a governance structure, by-laws, membership, board composition, and stakeholder involvement; • Funding increase for Enterprise Regions (ER); • Commitment to increasing capacity and expertise of ER staff allowing for specialization; • Possibility of regional satellite offices staggered throughout the region; • Stakeholder engagement through consultation, common understanding, SWOT, and determining needs of business, communities, and market based entities; • Board positions, committees, policies, procedures, responsibilities, monitoring performance, HR Plan & Transition Strategy will be developed.
Saskatchewan Indian Institute of Technologies – Yorkton Industrial Career Centre	• Maintain a current database of skilled aboriginal workers; • Provide case management support to both employer/employee through job coaching/mentoring; • Strong financial management including transparency and accountability; • Partnerships in the community and with industry stakeholders.
Service Canada	• Service Canada helps make it easy to access government services. They provide a choice in contact methods (1-800-OCanada, www.servicecanada.gc.ca or in person), information is easy to understand and service in both official languages; • Focus on assisting youth and persons with disabilities to overcome barriers to entering the labour market; • Access to labour market information and census information; • Ability to work with partners to address community issues regarding employment and the labour market.
Social Services	• Invest in positive outcomes for people in areas of income support, child and family services, supports for persons with disabilities, and affordable housing. • Work with citizens as they build better lives for themselves through economic independence, strong families and strong community organizations.
Society for the	• Staff who are strong and able to work independently;

Involvement of Good Neighbours (SIGN)	• Ability to develop new community programs and services through collaboration with various community partners; • Administrative ability – can administer programs for others; • Good knowledge of human services agencies and community-based organizations in Yorkton.
Sunrise Public Health	• Programs are regional in focus • Skilled at evidence based research and policy development • Legislative support through inspection standards and guidelines • Support, partner, provide resources and collaborate on all aspects of housing • Skilled at community planning, assessment of needs and capacity development • Through the Medical Health Officer advocate on issue that impact the health of people • Utilize the Health Status report to support the development of projects that deal with the determinants of health
Yorkton Tribal Council (YTC) Labour Force Development Program	• Friendly, knowledgeable staff with 100% client focus; • Strong working relationship with YTC member First Nations; • Accountable and transparent to the YTC leadership and membership and to our funding agencies.

REGIONAL PARTNERS' – LONG TERM GOALS

PARTNERS' MANDATES

Each of the regional partners has its own specific mandate, but all of the regional partners' mandates have elements in common. All of the partners are committed to:

- Assisting people to become more independent and to lead productive lives.
- Creating social and economic circumstances in the Parkland region that will contribute to a healthy economy and self-sufficiency for all citizens.

SHARED GOALS

All of the broad, long-term goals below relate to the various partners' mandates and were mentioned by more than one partner. These goals are shared by the regional partners:

- **To increase labour market attachment** among people who, historically, had weak connections with work. The groups mentioned most frequently were people with disabilities, Aboriginal people, and social assistance recipients.

- **To improve quality of life and people's ability to function independently**. Becoming employed is one aspect of this goal, but so is equipping people with life skills such as money management, helping them address issues like family violence, and providing services like transportation that foster independence.
- **To find/train the skilled reliable workers** that employers need. Employers seek staff who have skills specific to their line of work and general workplace skills like reliability, punctuality, the ability to get along with others, etc.
- **To educate and train people** – Generally higher levels of education mean more potential for employment, higher incomes, and more personal choices. Most of the partner organizations focus on training and education in one way or another.
- **To create stronger relationships with employers** and thus increase opportunities for work placements, and on-the-job training. In some technical fields, the workplace is the best place for training, since employers have sophisticated, computerized equipment that educational institutions cannot afford.
- **To create more job opportunities** by attracting businesses and industries to the area.
- **To keep more young people in the Parkland area** to ensure the labour force is constantly being renewed.
- **To improve the services available in the region for newcomers to Canada.** Increasing immigration to the region facilitates the achievement of a number of the shared goals and increases the overall potential of the region.

PARTNERS' LONG-TERM GOALS

Each of the partner organizations has its own set of goals for the next one to three years. These are displayed in Figure 5.

Figure 5: Partners' Long-Term Goals

ORGANIZATION	GOALS
Career and Employment Services	• Develop a skilled workforce to meet existing and future labour market demand; • Support innovative partnerships, programs and services for individuals requiring support in connecting with labour market opportunities; • Support the active engagement of the employer community to strengthen recruitment and retention practices.
City of Yorkton – Department of Economic Development	• To broaden the city's economic base through expansion and diversification; • To maintain and enhance the city's position as East Central Saskatchewan's regional trading area; • To foster a co-operative relationship with surrounding rural

	municipalities and First Nations to promote economic prosperity and smart growth development for the region; • To ensure an adequate supply of land for future development and expansion; • To provide adequate community infrastructure to accommodate target populations; • To enhance the physical appearance and economic vitality of the downtown area via revitalization strategies.
File Hills Employment & Training Centre	•
Good Spirit School Division	• Improved learning outcomes in the area of mathematics problem solving and reading comprehension; • Equitable opportunities for all students; • Improved transitions pre-K-12 and to post-secondary or employment; • Strengthen system wide accountability and governance.
Parkland College	See Parkland College Strategic Plan
Saskatchewan Abilities Council – Yorkton Branch	• To build stronger relationships with employers; • To provide vocational and avocational services throughout the region instead of just in the Yorkton area; • To maximize the use of technology in service delivery; • To participate in initiatives that divert materials from the landfill and create employment opportunities for people with vocational barriers; • To partner with agencies and individuals to build more inclusive communities.
Saskatchewan East Enterprise Region	• A sustainable agency specializing in growing key sectors, business development, and retention. Strategies and activities for growth will be developed by ER; • A policy-based board of directors with subcommittees focussing on sector development and strategic issues. Under the leadership of the Board of Directors, regular ER operations will commence and plans will be refined and implemented; • To establish a long term strategic and business plan with emphasis on gaining competitiveness in the global economy; • Ongoing stakeholder engagement and fulfillment; • Performance management and accountability.
Saskatchewan Indian Institute of Technologies – Yorkton Industrial Career Centre	• To assist in breaking down barriers to employment for Aboriginal employees; • To assist clients with skill development through certified training; • To encourage industry and partner participation in the project.
Service Canada	• To provide Canadians with one-stop easy-to-access, personalized service. Service Canada brings Government of Canada programs and

	services together in a single service delivery network;
Social Services	• To protect Saskatchewan's vulnerable people and support their inclusion in the province's prosperity; • Economic Growth: Sustain ***Economic Growth*** for the benefit of Saskatchewan people, ensuring the economy is ready for growth and positioning Saskatchewan to meet the challenges of economic and population growth and development; • Security: ***Secure*** Saskatchewan as a safe place to live and raise a family where people are confident in their future, ensuring the people of Saskatchewan benefit from the growing economy; • Promises: Keep Government's ***Promises*** and fulfill the commitments of the election, operating with integrity and transparency, accountable to the people of Saskatchewan.
Society for the Involvement of Good Neighbours (SIGN)	• To maintain effective delivery of current programming; • To be aware of community needs and respond as appropriate; • To continue to provide office and meeting space for Yorkton agencies and organizations.
Sunrise Public Health	• Find opportunity to enhance community engagement and to increase partnerships within the community. • Community involvement and engagement fosters a culture of individual responsibility for one's health. • Interagency/intersectoral collaboration focuses on improving children's health. • Support for the development and implementation of programs that address the determinants of health, specifically: Healthy Child Development Education and Literacy Income and Social Status Physical Environments that support healthy living
Yorkton Tribal Council (YTC) Labour Force Development Program	• To provide sponsorship and support to First Nations clients who are participating in Labour Market activities, which lead to potential employment; • To create partnerships with employers/businesses to provide employment opportunities for our clients (mostly First Nations); • To assist clients in job searches.

PARKLAND COLLEGE GOALS

The College's goals and objectives as outlined in the 2007-2012 Strategic Plan are shown below:

VISION: The College of choice celebrating quality learning and service.

MISSION: To create an innovative continuum of learning stimulating individual, community, and economic growth.

PARKLAND COLLEGE STRATEGIC GOALS

To be the College of choice for learners

- Celebrate student success
- Focus on student recruitment
- Focus on student retention
- Expand learning and service options
- Enhance student supports

To be an employer of choice

- Enhance communications
- Commitment to a representative workforce
- Provide a healthy, safe, and supportive environment
- Celebrate staff
- Encourage and support professional development and in-service training

To increase access and innovation

- Implement an international development plan
- Develop learning services and tools for newcomers to Canada
- Expand our Aboriginal strategy
- Strategically encourage program development

To foster College Renewal and Expansion

- Embed the Vision
- Build technology services
- Develop and improve infrastructure and administration
- Ensure effective leadership, management and accountability

To support economic growth and prosperity

- Support regional economic activity
- Strategically align partnerships
- Service and support business training needs of the region

APPENDIX A: AN OVERVIEW OF PARKLAND COLLEGE

Parkland College is one of eight regional colleges in Saskatchewan. It is located in the east-central part of Saskatchewan (Figure 5).

The college has five campus locations. The administration office is located in Melville. Other campuses are located in Canora, Esterhazy, Fort Qu'Appelle, and Yorkton. In addition, there are SCN (Saskatchewan Communication Network) sites in Preeceville and Kelvington.

Parkland College's geographic borders encompass all of the Sunrise Health Region plus small corners of the Kelsey Trail and Regina Qu'Appelle Health Regions.

Figure 5: Parkland College Geographic Location

PROGRAMS

Parkland College's programs fall into three categories: University, Technical Skills Training, and Adult Basic Education.

- **University Programs** – Parkland College partners with the University of Saskatchewan (U of S) and the University of Regina (U of R) to offer university courses in the east-central part of the province. Students can take their first year of Arts and Sciences from the U of S through the College, and some second- to fourth-year courses, as well. The College offers a variety of courses from the U of R including all of the classes needed to complete a degree in Social Work. University courses may be offered face-to-face, online or via SCN. Parkland College has the largest off-campus university program delivered at a regional college in Saskatchewan.
- **Technical Skills Training** – The College partners with training institutions like SIAST (Saskatchewan Institute of Applied Science and Technology) and SIIT (Saskatchewan Indian Institute of Technology) to offer credit technical programs. For example, courses are provided in Practical Nursing, Industrial Mechanics, and Business Years I & II. It also works with business, government, and community organizations to offer industry programs. Some of these non-credit programs feature work-based training. The overall goal of technical skills training is to equip individuals with skills needed for employment and at the same time to meet labour market shortages for employers.

- **Adult Basic Education Programs** – Adult Basic Education emphasizes the knowledge and skills needed for academic upgrading and allows students to achieve Adult 12 standing. Specific programs include:
    - Basic literacy
    - Adult 10
    - Adult 12
    - GED testing services
    - Workplace Essential Skills

Programs differ in their intensity. Some are full-year, full-time. Others, like university courses, operate for a few hours each week. The number of full load equivalents is a good indicator of student participation in programming.

Figure 6: Parkland College – Programs and Student Participation – 2009-2010 and 2010-2011

Type of Program	2009 - 2010		2010 - 2011	
	Enrollment	Full-Load Equivalents	Enrollment	Full-Load Equivalents
Adult Basic Education				
Credit – Adult 10 & 12 & Academic GED	647	298.84	693	321.93
Non-Credit	487	89.64	424	85.65
Total	**1,134**	**388.48**	**1,117**	**407.58**
University Program Total	**155**	**67.19**	**152**	**62.26**
Technical Skills Training				
Institute Credit	507	274.33	540	295.20
Industry Credit	930	32.69	979	23.52
Apprenticeship Training	45	17.60	56	21.33
Non-Credit	637	26.71	802	16.50
Total	**2,119**	**351.33**	**2,377**	**356.55**
TOTAL	**3,408**	**807.00**	**3,646**	**826.39**

CAREER AND STUDENT SERVICES

In addition to specific programs, Parkland College provides Career and Student Services. These services fall into two general categories:

- **Learner Support** – which includes:
    - Computer Assisted Learning Systems (CALS) Lab
    - Exam invigilation

- Language Instruction for Newcomers to Canada (LINC) or English as an Additional Language (EAL)
- Workplace Essential Skills
- Literacy tutors
- Scholarship opportunities
- SCN special events.

- **Counselling** – which includes:
  - Assessments
    - Psycho-educational
    - Academic
    - Career related
  - Customized workshop development
  - Group counselling
  - Individual counselling
  - Itinerant services
  - Labour market research
  - Learning Specialist assistance
  - Portfolio development
  - Provincial Training Allowance

PARKLAND COLLEGE ADMINISTRATION AND STAFF

Parkland College is governed by a seven-person Board of Governors. The members of the Board come from six different communities in the Parkland region and so represent a variety of interests. Parkland College has realized full-time equivalent growth over the past year. Although many of the 206 staff members are part-time, the total FTE (Full-Time Equivalent) reached 99.90 – an increase over last year. The largest single category of employee was instructors. In 2011, 83 people worked as instructors for a full-time equivalent of 33.33 positions (Figure 7).

Figure 7: Parkland College – Staff – 2010-2011

Category of Staff	Full-Time Equivalent	# of Staff
Out-of-Scope		
Senior Administrative Staff	8.00	8
In-Scope		
Managers	5.00	5
Coordinators, Counsellors, Consultants, and Facilitators	25.03	32
Administrative and IT Staff	5.70	7
Clerical Staff	18.92	32
Instructors	33.33	83
Aids and Tutors	3.92	39
Total	**99.90**	**206**

Source: Parkland College. *Annual Report 2010-2011*.

* Does not include out-of-scope instructors for Community Interest programming.

THE MONETARY VALUE OF A POST-SECONDARY EDUCATION

The Globe and Mail newspaper recently had a front page headline that seemed to suggest some kinds of post-secondary education may not be a good investment. Conventional wisdom suggests otherwise and the calculations in this article confirm that a post-secondary education is a very good investment indeed.

There are a host of assumptions that need to be made to calculate the monetary value of a post-secondary education. The most important one is to assume that the relationship between labour market activity and the level of completed education will be the same in the future as it is now. That assumption enables us to use the current statistics about age, education, and earnings to calculate what will happen to future graduates. Other simplifying assumptions are described below

There are three steps in the analysis that follows.

- The first step is to estimate expenditures that arise from going to school – tuition etc.
- The second step is to calculate expected labour market participation rates by age and level of education. How does the likelihood of having a job change with different levels of education?
- The third step is to take into account income earned. How do rates of pay and hours of work change with different levels of education?

Five different levels of completed education are examined (see box for notes):

- grade 10 completion is used as a proxy for less than high school graduation;
- high school graduation including an incomplete post-secondary education;
- a post-secondary diploma or certificate including a trade certificate;
- a university degree; and
- a graduate degree.

Initial Cost

Going to school costs money and precludes any significant participation in the labour market. To be conservative, the general assumptions made were as follows.

- Attendance at a post-secondary institution immediately follows completion of high school.
- There is no employment when going to school, not even summer employment.

Statistics Canada uses a hierarchy for classifying completed education with a university degree ranked higher than a trades certificate or diploma. This means that persons who have, for example, both a certificate and a degree will be classified as having a degree. Note that it is not necessary to finish high school in order to be a post-secondary graduate and that some certificates and diplomas can be obtained at a university. The education need not be obtained in Canada. The source of the education and labour market information is the Labour Force Survey which excludes the population living on Reserve.

The specific assumptions about tuition and other costs are documented in Table 1. We have assumed, for example, that it takes two years and $10,000 to get a post-secondary certificate or diploma and four years and $24,000 to get a university degree.

Employment Rates

Figure 1 shows the employment rate (the proportion of the population with a job) broken down by age group and the level of educational attainment. The figures are averaged over the three years from 2008 to 2010 to remove annual fluctuations. This was a period of strong demand for workers so one would expect relatively high employment rates even among those with lower levels of education and this is the case.

Those with less than high school were the least likely to be working and those with only high school were the second least likely. These observations hold at all age groups. Beyond that basic level of education, the employment rates are still higher among those with higher levels of education but the differences are quite small. In effect, the presence of any kind of post-secondary education will almost guarantee you a job.

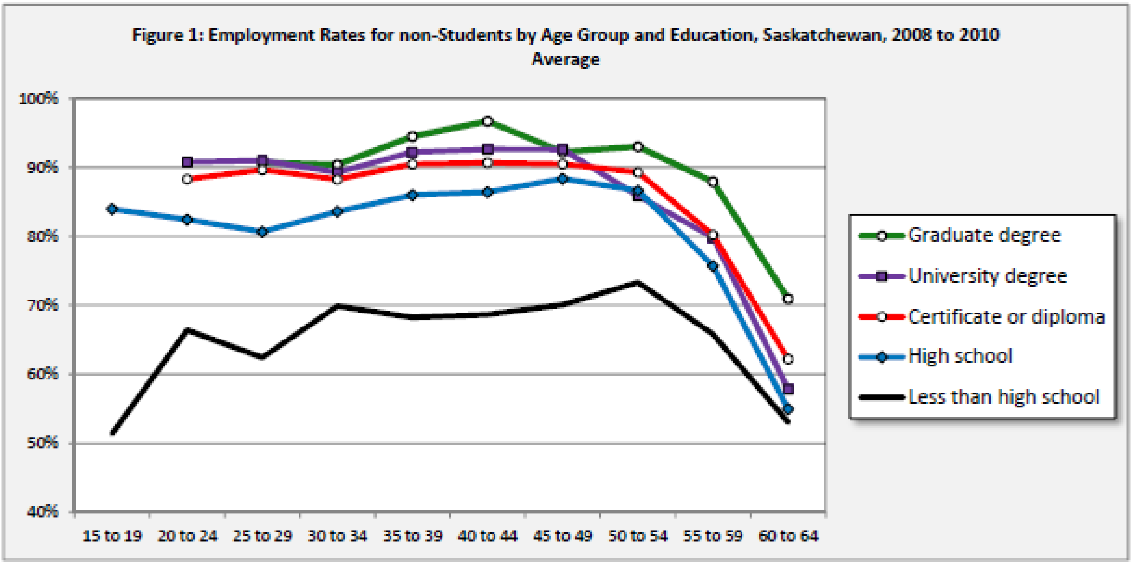
Weekly Earnings

Figure 2 shows average weekly earnings (at the main job) according to age group and educational attainment. This annual earnings figure is calculated by taking the average hourly wage rate and multiplying it by the actual weekly hours worked, assuming full-year employment.

Table 1: Education Cost and Employment Assumptions

	Education cost	Attend school	Start working
High school dropouts	$0	To age 16	Age 17
High school diploma	$0	To age 18	Age 19
Post-secondary certificate or diploma	$5,000 per year for two years	To age 20	Age 21
University degree	$6,000 per year for four years	To age 22	Age 23
Graduate degree	$6,000 per year for six years	To age 24	Age 25

Sask trends monitor



As with employment rates, earnings are higher among those with higher levels of education. There are only minor differences between high school dropouts and those with a high school diploma – the big increase in earnings comes with a university degree, particularly later in life.

Cumulative Income

The cumulative employment earnings over the lifetime of an individual are calculated by multiplying the probability of employment (that is, the employment rate) by the average annual earnings to arrive at Figure 3. Those with only a high school education initially have more earnings because they are not going to school but it doesn't take long for those with a post-secondary education to pay off the cost of their education and catch up. By age 30 for example, the expected cumulative earnings (net of education costs) are, in current dollars:

- $249,000 for the high school dropout;
- $316,000 for the high school graduate.
- $315,000 for the technical school graduate;
- $271,000 for the university graduate; and
- $226,000 for those with a graduate degree.

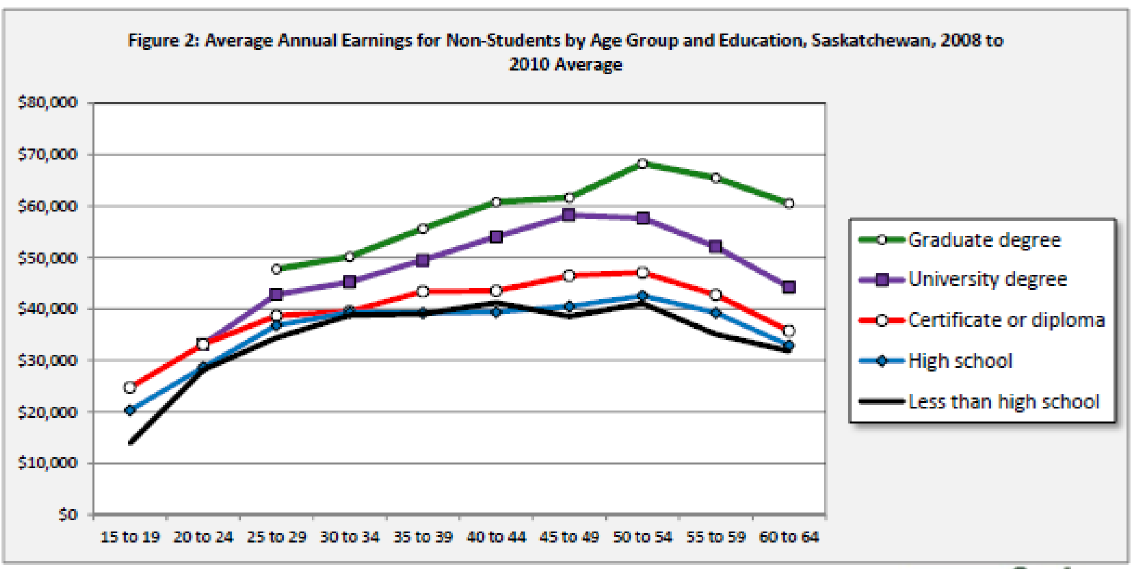


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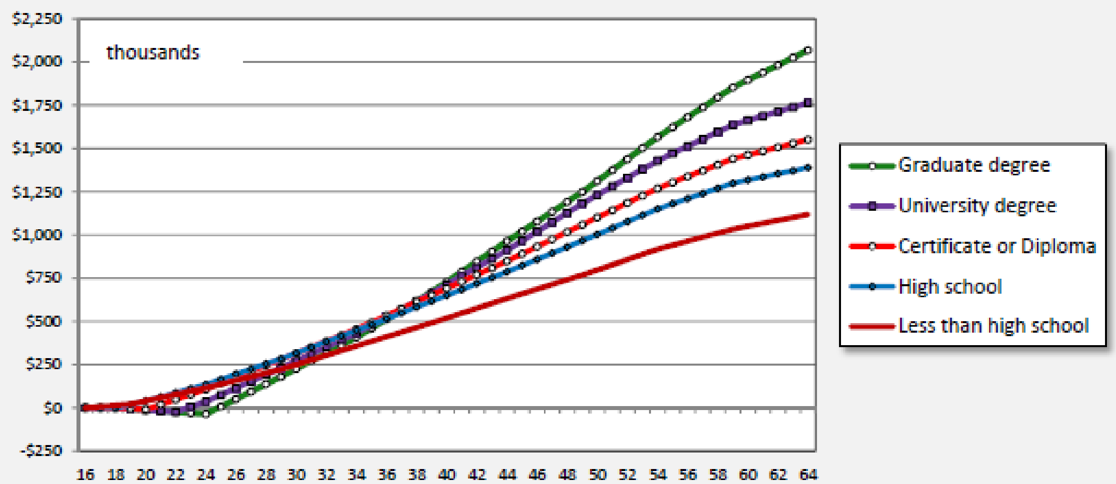
Figure 3: Cummulative Average Annual Earnings by Age and Education, Constant $2009



Beyond that age, expected lifetime earnings for those with higher levels of education easily exceed the incomes for those with lower levels of education.

An argument can be made that the net present value of the earnings should be used rather than the simple total because income today is worth more than income in the future. This is done in Figure 4 using a discount rate of 2%. The present value of the lifetime earnings are lower than the nominal values, of course, but the conclusion that higher levels of education yield higher earnings is unchanged.

Summary

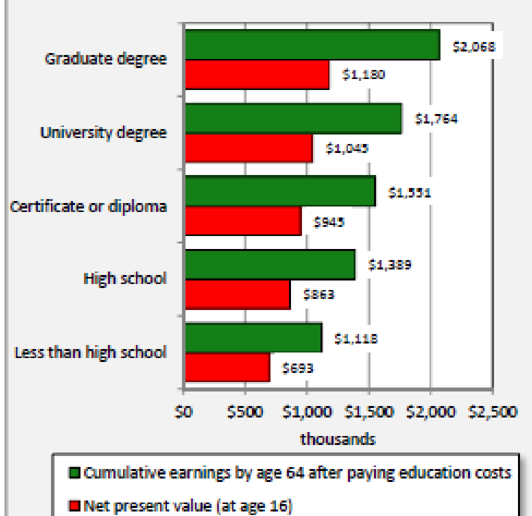
There is little doubt that some high school graduates who immediately head into the labour market eventually set up their own businesses and retire with more money than some university graduates, particularly those with less marketable degrees in such fields as Anthropology or Mathematics. But these are the exceptions. On average, those with a university degree will earn $1.76 million after paying off the cost of their education compared with $1.39 million for those with only a high school diploma[1].

These figures understate the monetary value of a post-secondary education because they do not take into account either a) the higher pensions that will accrue to those with higher incomes and b) capital gains from assets such as houses that will normally be associated with higher incomes. They also do not take into account the fact that the monetary rewards for higher education levels are expected to be greater in the future than they have been in the past.

Your mother was right – stay in school.

Source: Figures from the Statistics Canada Labour Force Survey

Figure 4: Comparison of Lifetime Earnings



Sask trends monitor

[1] *In a recently released study with a much more sophisticated methodology, Dr. Eric Howe from the University of Saskatchewan calculated roughly equivalent figures. For example, the lifetime earnings of someone with an undergraduate or graduate degree would be approximately $1.5 million.*

APPENDIX C: SASKATCHEWAN EAST ENTERPRISE REGION ECONOMIC IMPACT STUDY

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SASKATCHEWAN EAST ENTERPRISE REGION

Saskatchewan East Enterprise Region

Economic Impact Study

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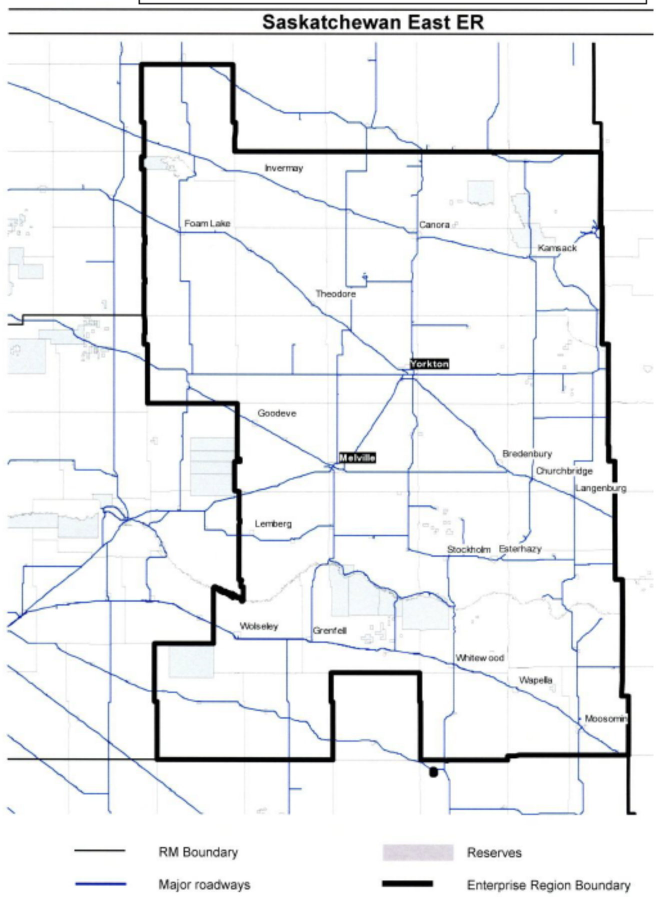
1.0 Introduction

This economic impact study was undertaken for the Saskatchewan East Enterprise Region (SEER). Exhibit 1 displays a reference map for the SEER. The region has a population of approximately 66,000 people, which includes the cities of Yorkton and Melville. These two cities account for about 40% of the region's population. Like most Saskatchewan Enterprise Regions, SEER is relatively new having been recently established.

SEER contains a significant portion of the province's potash industry expansion that is currently underway. This includes Mosaic's K1 and K2 mine sites located just north of Esterhazy with K3 under development. Currently, Mosaic's Esterhazy mine site is the largest potash mining operation in the world. Mosaic's mining operations at Esterhazy are undergoing a major multi-billion dollar expansion, which will double its workforce over the coming decade. This is having a major impact in the region and in particular the town of Esterhazy itself. The Potash Corporation's mine in the Rocanville area is also undergoing a major expansion. Communities such as Rocanville and Moosomin are already feeling the impacts of the expansion.

Exhibit 1.0 – Reference Map



PotashCorp undertook further exploration in the Bredenbury area. In addition to the expansion of existing mine operations by Mosaic and PotashCorp, there are also exploration programs to build new mines in the region such as Encanto Potash Corporation's Muskowekwan project on the Muskowekwan Indian Reserve near Yorkton. There are also two other new potash mining proposals just near the north-western border of SEER: BHP Billiton's Jansen project and Karnalyte Resources Inc. project near Wynyard. (BHP Billiton also has an exploration program near Melville.) While some of these projects are just outside the SEER, they could potentially impact the region. Typically, potash mines draw their labour supply from within 100 km of the mine site.

2.0 Study Objectives

The scale of a potash mining investment for the Saskatchewan East Enterprise Region is massive. One would have to go back to the 1960s and the start of the province's potash industry regarding such a significant level of investment. Given the historic nature of the current level of investment, SEER has identified a real need for economic analysis to estimate the economic impact of potash mine expansion on the regional and provincial economies. As noted in SEER's original Request for Proposals (RFP), the principal use of the study findings and results "will be to assist SEER in its efforts to explain the benefits and impacts and help prepare communities for future needs." This requires analyzing, preparing and communicating what the impacts will be and the potential opportunities and benefits for various sectors of the regional economy as well as SEER communities most affected by mining expansion.

3.0 Economic Structure

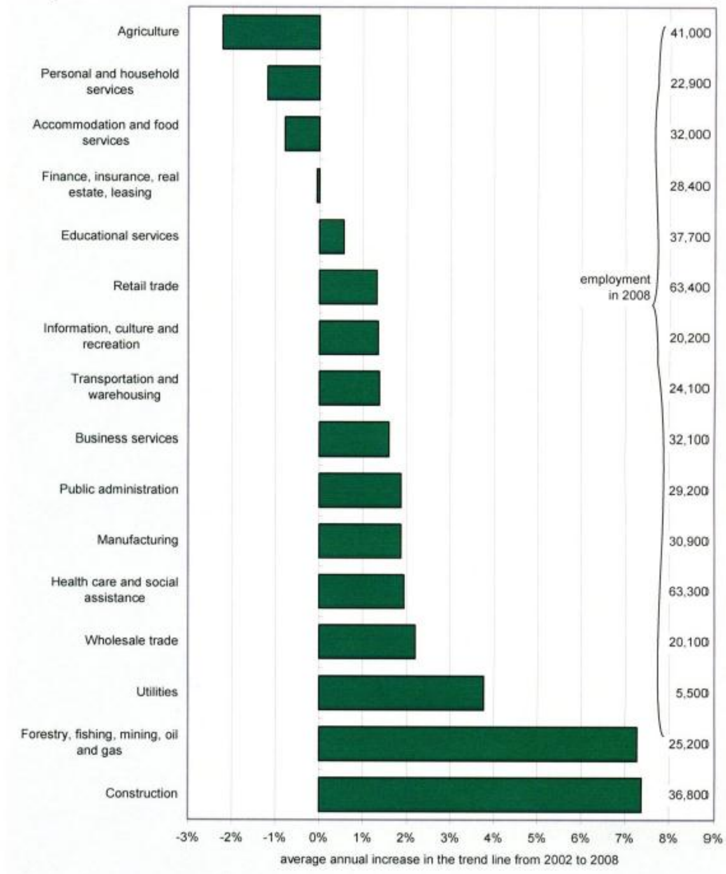
3.1 – Provincial Overview

Since 2005 Saskatchewan's Economic Circumstances Have Changed Dramatically

Saskatchewan's Economic Circumstances 2001 to 2010			
	2001-2005	2006-2010	2010
Population	(-0.6%)	+ 5.6%	1,045,000
Interprovincial Migration (Average)	(-7,499)	+ 1,963	2,689
International Migration (Average)	+1,365	+ 5,681	7,499
New Capital Investment	(-4.1%)	78.6%	$ 15.9 B
Employed Labour Force Growth	4.8%	6.3%	6.3%
Number of Housing Starts (Average)	2,953	5,265	5,907
Building Permits Issued	28.9%	82.6%	$ 2.1 B
Source: Saskatchewan Economic Review, Annual Reports.			

The beginnings of Saskatchewan's current economic momentum can be traced back to 2001-2006. With the exception of 2009, which saw a decline (temporary) in potash prices, Saskatchewan has been enjoying a sustained period of economic growth. For 2012, BMO Capital Markets forecasts that Saskatchewan will lead all provinces with 2.9% in GDP growth.

Figure 3.1 – Trends in Employment by Industry Group, Saskatchewan, 2002 to 2008



Source: SaskTrends Monitor

Mining, Oil and Gas and the Construction Sector Have Been Leading Saskatchewan's Economic Growth

As shown in the following graph, the resource sector (namely mining, oil and gas production) has been experiencing strong employment demand. Saskatchewan's mineral sector has also been fuelling employment growth in the province's construction sector.

Industrial/Manufacturing, Mining, Oil and Gas Sectors Account for a Substantial Portion of Saskatchewan Current Major Projects' Inventory

As shown below, these sectors account for over 60% of the value of Saskatchewan's current major projects inventory – industrial/manufacturing, mining, oil and gas.

Saskatchewan's Economic Circumstances 2005 to 2010

	Saskatchewan		
Major Projects	**2008**	**2009**	**2010**
Number of Projects	**393**	**464**	**533**
Value in $ Millions	**$ 26,600**	**$35,727**	**$49,237**
Number of Projects by Phase			
Phase I	81	76	78
Phase II	95	162	183
Phase II/III	3	8	12
Phase III	214	218	256
Total Projects by Phase	**393**	**464**	**529**
Value of Projects by Phase			
Phase I	$ 5,070	$ 6,792	$ 10,485
Phase II	9,515	10,662	18,249
Phase II/III	1,891	6,521	6,553
Phase III	10,124	11,752	13,934
Value of Projects by Phase	**$26,600**	**$35,727**	**$49,221**

	Saskatchewan					
	2008		2009		2010	
Projects by Sector	**#**	**Value**	**#**	**Value**	**#**	**Value**
		$ Millions		$ Millions		$ Millions
Agriculture	12	$ 359	4	$ 67	3	$ 34
Commercial/Retail	40	488	55	1,568	79	1,848
Education	35	669	36	691	39	884
Health	10	495	30	768	31	834
Industrial/Manufacturing	21	7,247	12	9,043	14	12,010
Infrastructure	42	1,086	59	2,205	80	2,603
Institutional	32	681	44	645	59	803
Mining	11	4,411	15	7,078	17	16,008
Oil/Gas	37	5,062	32	6,094	13	5,796
Power	36	2,396	68	3,228	95	4,182
Creation/Tourism	37	690	33	1,163	31	998
Residential	42	2,779	45	2,872	48	2,886
Telecommunications	5	123	6	215	8	228
Water and Sewer	33	116	25	91	16	123
Total	**393**	**$ 26,602**	**464**	**$ 35,728**	**533**	**$ 49,237**

The inventory of major projects in Saskatchewan was compiled by Enterprise Saskatchewan. It lists major projects in Saskatchewan, valued at $2 million or greater, that are in planning, design, or construction phases. The inventory does not break down project expenditures by any given year. The value of a project is the total of expenditures expected over all phases of project construction, a process that may span several years. Not all projects can be assigned to a specific location.

Phase I projects are in the proposal stage.
Phase II projects are in the planning and design stage.
Phase III projects are in the tendering and construction phase.

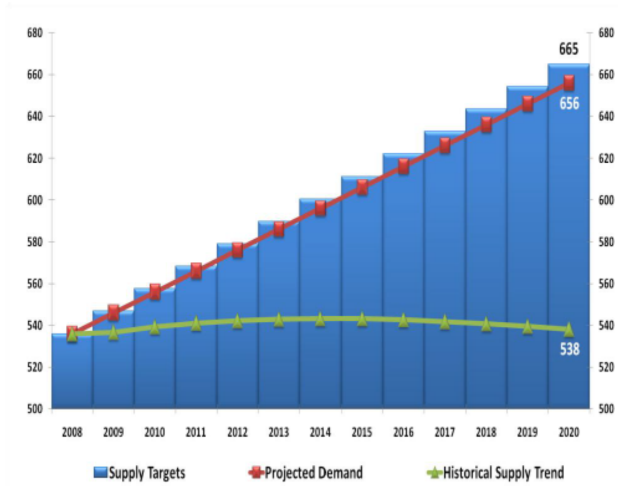
Labour Supply Will Continue to Be a Major Economic Issue

The growth of Saskatchewan's labour supply being generated by the provincial population has plateaued.

If Saskatchewan remains along the historic path of low population growth, participation rates, and educational attainment, the province will not have enough people to sustain and grow the economy. During 2007 and 2008, the Saskatchewan economy added over 20,000 workers, yet businesses still reported labour shortages.

It is projected that Saskatchewan will need an additional 120,000 workers by 2020, or 10,000 workers per year, while aggressive, is necessary. New approaches will be needed to meet future labour demand. It will require significant increases in provincial participation rates and educational attainment, and substantial national and international migration as well as increased Aboriginal labour force participation.

Figure 3.2 – Saskatchewan Labour Force - Historical Trend, Projected Demand and Strategic Targets (000's)



Source: Saskatchewan Labour Market Commission – 2010.

3.2 – Saskatchewan East Enterprise Region

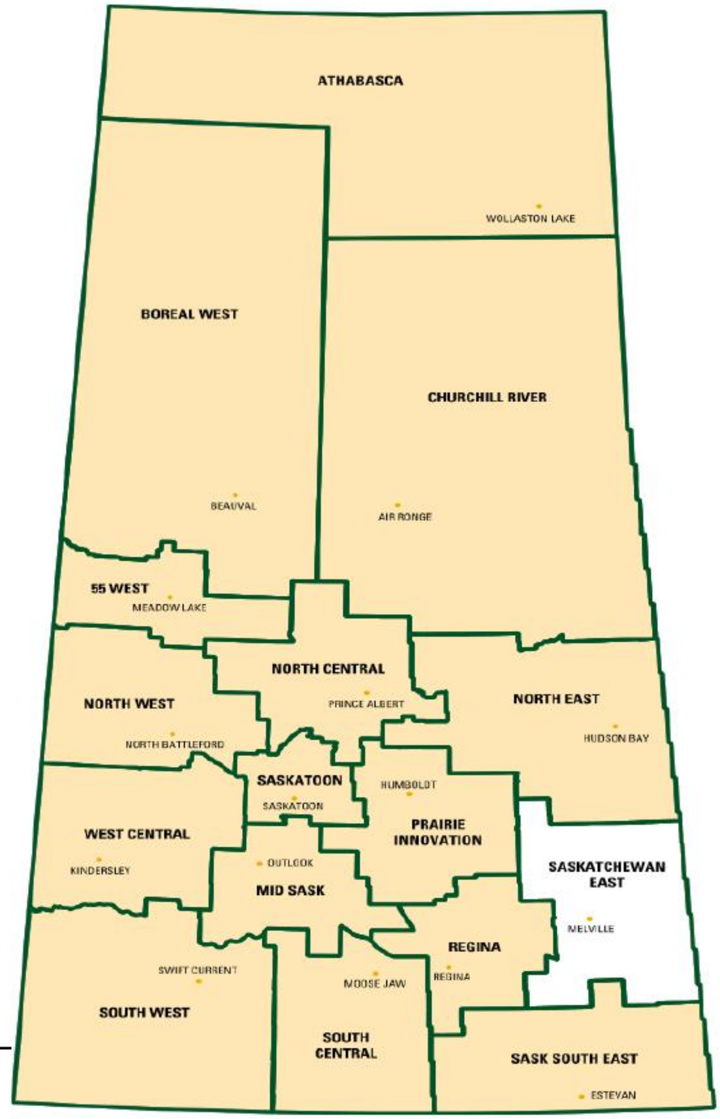
SEER is the Fourth Largest Enterprise Region in Saskatchewan

The following table presents population data for all Saskatchewan's 16 enterprise regions which were established after 2008.

Saskatchewan Enterprise Region – Population Date		
	Regional Population	**Major Urban Centres**
Saskatoon Regional Economic Development Authority	242,000	Saskatoon
Regina Regional Opportunities Corporation	220,000	Regina
North Central Enterprise Region	71,000	Prince Albert
Saskatchewan East Enterprise Region	66,000	Yorkton-Melville
North West Enterprise Region	60,000	North Battleford-Kindersley
South Central Enterprise Region	52,000	Moose Jaw
South East Enterprise Region	47,000	Weyburn/Estevan
Southwest Enterprise Region	47,000	Swift Current
North East Enterprise Region	43,000	Melfort-Nipawin
Prairie Innovation Enterprise Region	41,000	Humboldt
West Central Enterprise Region	27,000	Kindersley
Churchill River Enterprise Region	23,000	La Ronge
Mid-Sask Enterprise Region	16,000	Outlook-Davidson-Craik
55 West Enterprise Region	15,000	Meadow Lake
Boreal West Enterprise Region	11,000	Buffalo Narrows-La Loche
Athabasca Enterprise Region	2,000	Stony Rapids
Source: Enterprise Saskatchewan		

As shown in this table, SEER has the fourth largest enterprise regional population. SEER also has the fifth largest urban center (Yorkton @20,000 residents) in the province.

Figure 3.3 – Saskatchewan Enterprise Regions – 2011



Derek Murray Consulting & Associates

SEER Has Been Experiencing Employment Growth Similar to Other Regions

The sample size in the Labour Force Survey (LFS) is large enough to enable publication of employment data for seven sub-provincial regions in the province – the Regina and Saskatoon Census Metropolitan Areas (CMAs) and five other regions. The map in Figure 3.3 shows the economic regions used in the LFS and the data in Figure 3.4 show employment trends in these regions over the past seven years. The East Central LFS Region is a reasonable proxy for SEER.

The strongest growth has been in the Saskatoon CMA where employment has grown by an average of 2.7% per year from 2002 to 2008. The two large urban centres and their metropolitan areas now account for nearly one half (49%) of employment in the province even though Regina's growth rate has been much lower than Saskatoon's.

Figure 3.4 – LFS Economic Regions in Saskatchewan.

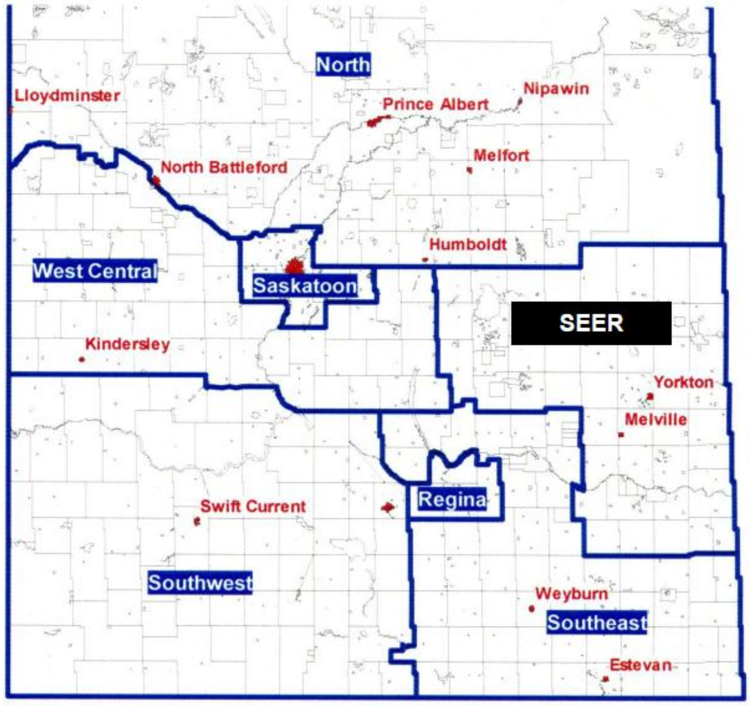
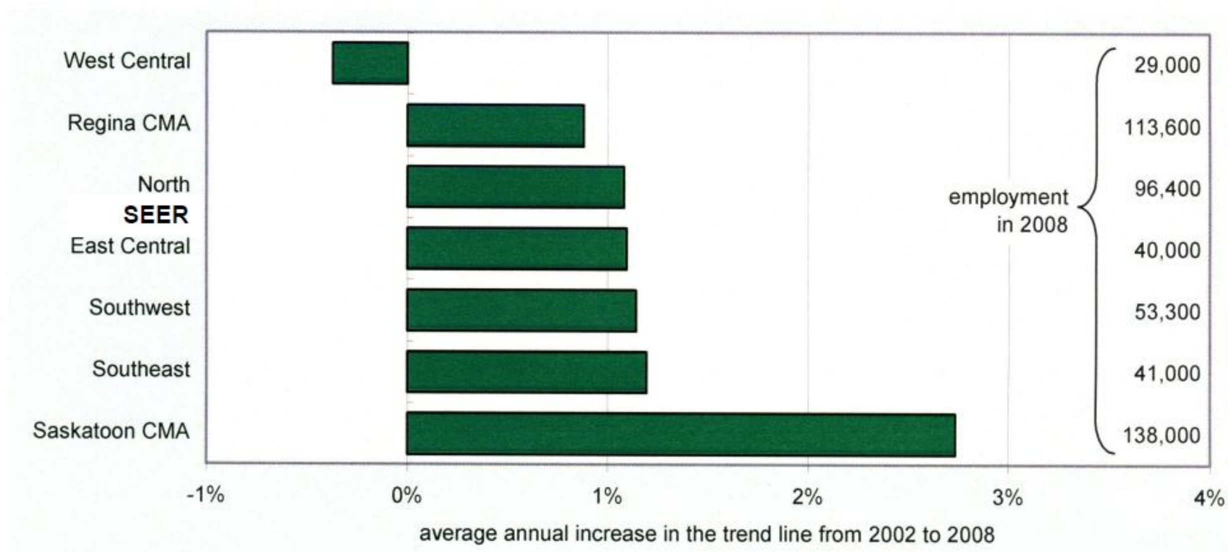


Figure 3.5 – Trends in Employment by Region, Saskatchewan, 2002 to 2008, Off-Reserve Population Only



Source: *SaskTrends* Monitor

Only one of the regions, namely the west central part of the province saw an employment decline over the period. The other four rural economic regions including SEER had similar growth rates suggesting that the employment growth was spread relatively uniformly across the province.

Agriculture, Health Care and Trade Sectors Are SEER's Major Employers

As shown in the following table, three industry sectors are the leading employers in the Region, agriculture (6,800), health care/social assistance (6,300), trade (5,900) which includes both retail and wholesale trade, and agriculture. However, regarding the latter, it has been losing employment.

Recent Employment Trends in the SEER – 2006 to 2010			
	% Change SEER	% Change Saskatchewan	Total Employment (000s)
Construction	27.7%	36.4%	2.4
Health Care/Social Assistance	23.5%	13.6%	6.3
Trade (Retail-Wholesale)	22.9%	4.6%	5.9
Transportation and Warehousing	20.0%	0.8%	2.4
Primary Industry (non-agricultural)	14.3%	21.5%	2.4
Finance, Insurance, Real Estate	11.1%	18.7%	2.0
Public Administration	7.1%	2.9%	1.5
Manufacturing	(-13.1%)	3.7%	2.0
Agriculture	(-24.3%)	(-12.0%)	6.8
Education	(-30.3%)	2.3%	2.0
Other Total	4.8%	5.1%	6.5
Total	–	–	40.2
Source: Labour Force Survey.			

Industry Sectors Leading Employment Growth in SEER include Construction, Health Care, Trade and Transportation/Warehousing

The foregoing table also displays employment growth by industry over the period 2006-2010. While agriculture is the Region's largest employer, it continues to lose jobs. This is due to increasing farm size and technologies that continue to displace labour.

Similar to Saskatchewan, construction has been experiencing the strongest employment growth. Again, similar to Saskatchewan, the health care/social assistance sector has been experiencing strong employment demand.

Employment growth in the trade sector has actually been much stronger in SEER (22.9%) than for Saskatchewan (4.6%). In particular, the city of Yorkton has undergone a major expansion in its trade sector. SEER's transportation and warehousing sector is also experiencing much stronger employment growth (20.0%) than Saskatchewan at under 1%. This is likely due to the recent construction of two major canola plants and other industry growth that is driving the demand for transportation and warehousing. The Ministry of Highways and Infrastructure has made investments in a new truck route (Phase 1 – $8.6 million) to accommodate increased grain and other truck traffic. The major decline in the education sector's employment is somewhat puzzling. There has been little employment growth in this sector at the provincial level (2.3%). In general rural schools have been experiencing declining enrollment and this may have impacted the SEER more so than the province as a whole.

Interviews with SEER school divisions confirmed that K to 12 school enrollments declined after 2006. However, more recently enrollment is growing in certain communities. As a result, it is likely that employment will increase in the education sector.

Lastly, SEER's non-agriculture primary industry sector has not been growing as fast as Saskatchewan (14.3% for SEER compared to 21.5% for Saskatchewan). This is due to a couple of factors. Firstly, SEER does not have much employment in the oil sector compared to other enterprise regions such as the South East. Secondly, the expansion in the region's potash industry is still in the construction phase.

SEER's Labour Force Participation Rate is Somewhat Lower than Other Regions

The following table compares SEER's labour force participation rate (population age 15+) with other regions.

Comparative Labour Force Participation Rates -- 2010	
	Employment Rates
Alberta	**72.5%**
Saskatchewan	**69.6%**
Saskatoon	71.8%
Regina	70.2%
Prince Albert	67.6%
Swift Current	66.8%
SEER	66.7%
Source: Labour Force Survey.	

As shown in the table, SEER has the lowest participation rate for the five areas surveyed. This doesn't necessarily suggest a lack of demand but more so a labour supply-demand imbalance where the Region's skill set is not matched with employment growth in the area.

As of 2010, SEER Had a $6.8 Billion Major Project Inventory

As shown below, SEER had a $5.2 billion major project inventory in 2010. SEER accounts for just over 10% of the value of the entire Saskatchewan Major Project Inventory in 2010.

SEER and Saskatchewan Major Project Inventory						
	Saskatchewan			SEER		
Major Projects	**2008**	**2009**	**2010**	**2008**	**2009**	**2010**
Number of Projects	**393**	**464**	**533**	**21**	**24**	**25**
Value in $ Millions	**$ 26,601**	**$35,727**	**$49,237**	**$ 2,111**	**$ 3,476**	**$5,198**
Number of Projects by Phase						
Phase I	81	76	78	2	1	4
Phase II	95	162	183	8	8	9
Phase II/III	3	8	12	0	1	1
Phase III	214	218	256	11	14	11
Total Projects by Phase	**393**	**464**	**529**	**21**	**24**	**25**
Value of Projects by Phase						
Phase I	$ 5,070	$ 6,792	$ 10,485	$ 17	$ 300	$ 315
Phase II	9,515	10,662	18,249	1,842	111	1,810
Phase II/III	1,891	6,521	6,553	0	2,800	2,800
Phase III	10,124	11,752	13,934	252	366	273
Value of Projects by Phase	**$26,601**	**$35,727**	**$49,237**	**$ 2,111**	**$3,577**	**$5,198**
Source: Enterprise Saskatchewan.						

It should be noted that SEER has updated the 2010 major projects inventory for the region which is estimated to be $6.8 billion in 2011.

The Potash Corporation of Saskatchewan's $2.8 billion expansion at Rocanville and Mosaic's $1.6 billion expansion at Esterhazy account for 85% of the total value of all major projects in the SEER. Appendix A contains a detailed list of all major projects in the region.

SEER and Saskatchewan Major Project Inventory						
	Saskatchewan			SEER		
Major Projects	**2008**	**2009**	**2010**	**2008**	**2009**	**2010**
Value of Projects by Sector ($ Millions)						
Agriculture	$ 359	$ 67	$ 34	$ 8	$ 0	$ 0
Commercial/Retail	488	1,568	1,848	18	18	14
Education	669	691	884	10	10	0
Health	495	768	834	31	8	0
Industrial/Manufacturing	7,247	9,043	12,010	220	270	175
Infrastructure	1,086	2,206	2,603	47	48	64
Institutional	681	645	803	0	0	0
Mining	4,411	7,078	16,008	1,700	2,800	4,384
Oil/Gas	5,062	6,094	5,796	0	0	0
Power	2,396	3,228	4,182	0	378	511
Recreation/Tourism	690	1,163	998	42	25	27
Residential	2,779	2,872	2,886	23	13	23
Telecommunications	123	215	228	0	0	0
Water and Sewer	116	91	123	11	7	0
Total Value of Projects	**$26,601**	**$35,727**	**$49,237**	**$ 2,110**	**$ 3,577**	**$ 5,198**
Source: Enterprise Saskatchewan.						

Over the Longer Term There Has Been a Continuous Shift from Rural to More Urban-based Population in Both SEER and Saskatchewan

As shown below, like Saskatchewan, SEER is becoming more and more urbanized with Yorkton and Melville accounting for 33% of the Region's population. Also noteworthy is the population growth on Indian Reserves, which has doubled in the period 1981 to 2006.

Population Distribution for Saskatchewan and SEER – 1981 to 2006						
	Percent of Total Population					
Distribution of Population	1981	1986	1991	1996	2001	2006
Saskatchewan						
Urban Areas *	54%	57%	59%	60%	61%	62%
Towns/Villages	20%	19%	19%	18%	17%	17%
Rural Municipalities	21%	20%	18%	17%	16%	15%
Indian Reserves ^	2%	2%	2%	3%	3%	3%
North **	3%	3%	3%	3%	3%	4%
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**
Saskatchewan East ER						
Urban Areas *	28%	29%	30%	31%	32%	33%
Towns/Villages	36%	37%	36%	35%	35%	34%
Rural Municipalities	33%	32%	30%	29%	27%	26%
Indian Reserves ^	3%	3%	4%	5%	6%	6%
North **	–	–	–	–	–	–
Total	**100%**	**100%**	**100%**	**100%**	**100%**	**100%**

* Regina, Saskatoon, Prince Albert, Moose Jaw, Estevan, Humboldt, Melfort, Melville, North Battleford, Swift Current, Weyburn, Yorkton, and the Saskatchewan portion of Lloydminster. Includes surrounding "bedroom communities".

** Census Division #18, also called the Northern Administration District, including Towns/Villages and Reserves.

^ The White Cap Reserve is classified as part of the Saskatoon Metropolitan area rather than as a Reserve.

Source: *SaskTrends* Monitor.

The Region's Aboriginal Population, Which is Predominantly First Nations, Accounts for 12% of the Region's Total Population and is Growing

Aboriginal Population Distribution for SEER – 1996 to 2006				
	Counts		Share of Total	
	1996	2006	1996	2006
Aboriginal and non-Aboriginal Total	71,170	63,015	100.0%	100.0%
Non-Aboriginal Population	65,320	55,625	91.8%	88.3%
Aboriginal Population*				
North American Indian Identity	4,615	5,640	6.5%	9.0%
Metis Identity	1,095	1,570	1.5%	2.5%
Other or Multiple	140	180	0.2%	0.3%
Total Aboriginal	**5,850**	**7,390**	**8.2%**	**11.8%**
Aboriginal Population by Residence				
Urban Areas**	1,350	2,045	23%	28%
Towns/Villages	660	1,105	11%	15%
Rural Municipalities	240	435	4%	6%
Indian Reserves ^	3,540	3,770	61%	51%
North ***	–	–	–	–
Total	**5,790**	**7,355**	**100.0%**	

* Those who reported that they were members of a First Nation, Registered, or Treaty Indians bud do not identify with an Aboriginal group are classified in the "other" Aboriginal identity category.

** Regina, Saskatoon, Prince Albert, Moose Jaw, Estevan, Humboldt, Melfort, Melville, North Battleford, Swift Current, Weyburn, Yorkton, and the Saskatchewan portion of Lloydminster. Includes surrounding "bedroom communities.

*** Census Division #18, also called the Northern Administration District, including Towns/Villages and Reserves.

^ The White Cap Reserve is classified as part of the Saskatoon metropolitan area rather than as a Reserve.

Source: *SaskTrends* Monitor

As shown above, the Region's Aboriginal population accounts for 11.8% of the Region's total population. While the Region's overall population, prior to 2006, had been declining, the Aboriginal population has been growing. For Saskatchewan it is forecast that the province's Aboriginal population will increase to as much as 28% by the year 2035 from its current level of 15%. If the SEER Region follows a similar pattern, the Region's Aboriginal population could increase to 21.8% of the Region's total population by 2035.

4.0 Mining Industry Sector

4.1 – Overview of Saskatchewan's Mineral Sector

Saskatchewan has two of the most desired commodities in the world – potash and uranium. In fact, with about 30% of global potash production and 18% of global uranium production, Saskatchewan is the world's leading supplier of potash and second largest supplier of uranium. In 2010, Saskatchewan's mineral production was the second highest in Canada, with sales amounting to $6.9 billion. In the past three years, more than $1.1 billion has been spent on exploration. Mining companies are attracted by Saskatchewan's mineral potential, efficient regulatory environment and strong investment opportunities.

Over the next decade the Saskatchewan Mining Association forecasts that the provincial mining industry will have to hire between 9,200 and 21,000 workers. These forecasts are based on contractionary (low) to expansionary (high) growth forecasts for the industry. The hiring requirements are based on a combination of growth, retirements and industry turnover. The following table forecasts the broad types of occupations the industry will be requiring over the next decade. This is based on a baseline or median future growth scenario for the industry.

Saskatchewan Mining Industry Cumulative Hiring Requirement Forecasts – By Occupation Categories – Baseline Scenario 2021			
	2013	**2016**	**2021**
Trades and Undesignated Occupations	1,730	2,740	4,890
Professional and Physical Science Occupations	345	545	975
Human Resources and Financial Occupations	60	95	175
Support Workers	170	265	480
Technical Occupations	405	645	1,155
Supervisors, Coordinators and Foremen	295	465	835
All Other Occupations	2,925	3,635	6,495
Total	**5,300**	**8,400**	**15,100**

Source: Mining Industry Human Resource Council, Spring 2011.

* Numbers may not add perfectly due to rounding in subcategories.

Appendix B contains a detailed list of industry occupations and demand/supply characteristics forecast to the year 2021.

4.2 – Mining Sector Impact

A study was conducted by the Saskatchewan Mining Association in 2008 to determine the infrastructure needs of the Saskatchewan Mining Industry. Part of the study looked at indirect and induced jobs associated with the Saskatchewan mineral industry.

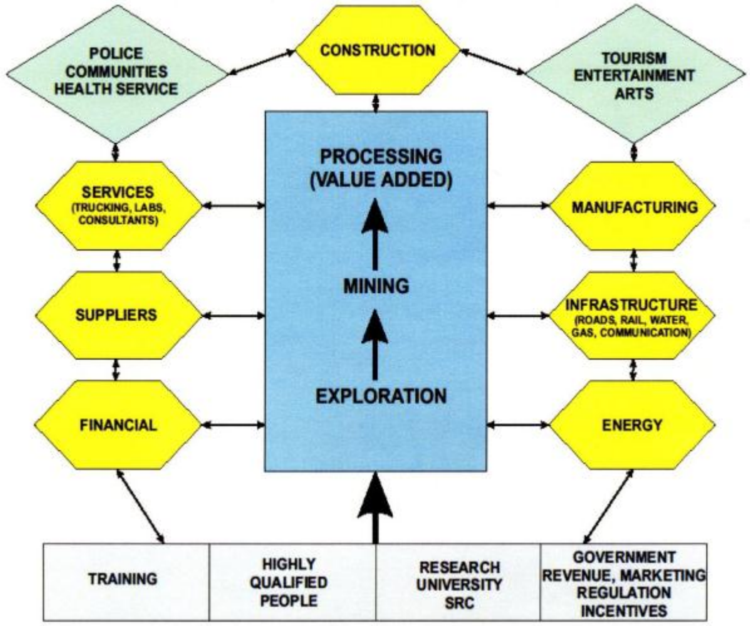
Direct jobs	–	10,458
Indirect jobs	–	13,913
Induced jobs	–	6,128
Total	–	**30,499**

It has been estimated that for every job at a mine, two jobs are created elsewhere in the economy in jobs that service the industry. There are about 10,000 jobs in the mineral core, but there are an additional 20,000 indirect and induced jobs in the Saskatchewan economy. On a Canadian scale, Natural Resources Canada suggests that each job at the mine creates four jobs in the broader Canadian economy. This suggests Saskatchewan's mines are creating another 16,000 jobs outside the province.

Minerals are non-renewable resources, meaning at some time in the future the mines will exhaust their reserves. In a number of countries, the actual mineral core has disappeared but the cluster remains. Sweden's and Finland's mineral industries have declined but they remain arguably world leaders in the manufacturing of mining machinery.

The diagram below shows conceptually the economic linkages from the mineral industry to the broader economy.

Mineral Industry Cluster



The darker blue area is the core of the mineral industry (exploration-mining and processing), the hexangular blocks have direct links to the core (also called indirect impacts), the diamond shaped blocks have indirect links to the industry (also called induced impacts), and the square area are inputs into the industry. The supply chain is usually defined as supplier, services and in some cases manufacturing.

A number of jurisdictions have moved to different economic development models that take into account the total impact of the core on the economy. Examples of this include the "Ontario Mining Cluster Strategy".

> *A cluster is defined as a concentration of inter-related industries and institutions that drive wealth creation, primarily through innovation and the export of goods and services. Clustered industry mutually reinforces and enhances each other's competitive advantage.*

This model results in a number of implications

- The majority of jobs generated are outside of the mineral sector. Typically each job in the mineral sector generates two jobs outside broader sector in Saskatchewan and likely a similar amount outside the province.
  - The challenge for Saskatchewan is ensure more of the jobs going outside the province are taken by Saskatchewan business
  - The challenge for SEER is ensure as many jobs are taken up by business located in the Saskatchewan East Enterprise Region.
  - The jobs at Rocanville and Esterhazy will be occupied largely by people living in the Saskatchewan East Enterprise Region.

4.3 – Overview of Saskatchewan's Potash Industry

Given the significance of the potash industry to the Region's economy, particularly from the perspective of investment, this section provides a detailed analysis of the potash industry.

4.3.1 – Potash as a Commodity

- Potash is used primarily as a fertilizer. Saskatchewan produces about 30% of world production. The long-term outlook for potash is strong: 4.3% increase annually in demand (International Fertilizer Association).

- Saskatchewan potash production has undergone major fluctuations in the last few years. Production in a typical year is in the 16 million tonne range but in 2009 this dropped significantly to 9.56 million tonnes. Production has rebounded in 2010.
- Potash prices have risen sharply peaking in 2008 at spot prices well over $600 per tonne. Currently prices are in the $300-$400 per tonne range.
- Growth is driven by increasing population but other factors include:
  - Increasing wealth in China resulting in the demand for meat which results in greater demand for feed crops and hence potash.
  - Increased production of fuel crops (ethanol and synthetic oils).

4.3.2 – Saskatchewan Potash Sector

- Saskatchewan has about 55% of the world's Potash reserves. There are three major potash geologic units in Saskatchewan. Two of the units underlie most of SEER. These units extend southeast in a line from Yorkton to Langenburg then swings south in a line roughly paralleling the Saskatchewan Manitoba border.
  - The SEER region is best suited for underground mining.
  - Potash mineral potential in most of the SEER area is very high
- There are 10 potash mines in Saskatchewan. Two of the mines: PCS Rocanville and Mosaic Esterhazy are within the Saskatchewan Eastern Enterprise Region.
- All 10 existing Saskatchewan potash mines are expanding at a capital cost of $11.9 billion. Two large construction camps have been established near Rocanville and Esterhazy
- A number of companies have announced the construction of new mines. This includes the BHP-Billiton operation at Jansen west of SEER. Estimated capital costs of all phases of the BHP project are $12 billion.
- Two other projects in Saskatchewan appear to be moving beyond the exploration phase. This includes the Vale project east of Regina and the Legacy project north-west of Regina.

4.3.3 – Profile of Potash Mining Employment

The potash industry would account for about two-thirds of Saskatchewan's core mining industry employment (approximately 6,000 jobs). The northern Saskatchewan mining industry has approximately 2,900 employees. With the exception of Mosaic's solution mine at Belle Plaine (which does not involve underground employment) potash mines in Saskatchewan have a similar employment profile as described below.

Potash Mining Employment (Typical Operating Potash Mines in Saskatchewan)

- 50% of the workforce is underground with positions such as:
  - Maintenance
  - Production
  - Shaft-related jobs
  - Technicians
  - Mine Engineers/Supervisors
- 50% of the workforce is above ground with positions such as:
  - Technicians
  - Engineers
  - Lab Technicians
  - Warehouse jobs
  - Administration/Accounting
  - Human Resources
  - Logistics

(In the case of Esterhazy, given water-related issues, there are a number of positions such as technicians involved with groundwater and flooding)

- A large portion of mining jobs are entry level positions (35%-40%) requiring a Grade 12 education and over 19 years of age.
- A large portion of employment involves operating and maintenance which includes the following trades:
  - Mechanical
  - Welders
  - Electrical Instrumentation
  - Heavy Equipment Operators
  - Power Engineering
- The largest demand is for mechanical and electrical trades resulting from expansion and retirements. Over 60% of mechanics and electricians are over the age of 50.

4.3.4 – Current Exploration Activities

Mineral exploration in Saskatchewan has increased dramatically over the last 3-4 years. In 2010, mineral exploration in Saskatchewan was approximately $355 million, with the potash industry accounting for well over half that amount and increasing, with announcements almost every four months.

There are a number of potash exploration projects in Saskatchewan at this time.

- Potash Corporation of Saskatchewan
  - Bredenbury area
- BHP Billiton
  - Melville area
  - Nokomis area
  - Janzen Lake area
  - Young area
- K & S Potash Canada – Legacy Project
  - Bethune area
- North Atlantic Potash (JSC Acron)
  - 26 permits
  - Foam Lake area
- Rio Tinto PIC
  - Joint venture with Acron
  - Last Mountain Lake – Broadview area
- Encanto Potash
  - Muskowekwan area (100 km north of Regina)
- Karnalyte Resource Inc.
  - Wynyard area
- Western Potash Corp.
- Agrium
  - Yorkton area
- Vale
  - Kronau area
  - Proposed solution potash mine

The foregoing exploration projects are located in a very wide band stretching from east of Saskatoon to the Saskatchewan/Manitoba border. The following projects are located within or very close to SEER. These projects, if they proceed to actual operating mines, would have the greatest impact on SEER. Generally, potash mines draw most of their labour supply from within a 100 km radius.

Current Exploration Projects in the SEER Area		
Project	**Location**	**Status**
BHP Billiton	Melville	active
Encanta Potash	Muskowekwan	active
Potash Corp. of Saskatchewan	Bredenbury	completed feasibility phase
Agrium	Yorkton	on hold
North Atlantic Potash (Acron)	Foam Lake	active
Source: Post Media Network Inc., *Globe and Mail*, Corporate News Releases.		

- In addition, the foregoing major potash mineral rights holders in SEER include:
  - Agrikalium Mining Corporation
  - Potash North Resources Corporation now a subsidiary of Potash One
  - Canada Potash Corporation
  - 101109718 Saskatchewan Corporation

4.3.5 – Current Potash Industry Activities and Impacts

Mosaic Esterhazy – In general terms, there are two phases of expansion underway. The first phase removes a series of bottlenecks in the mill system and expands the tailing facilities. The second phase constructs two new shafts (K3) and builds surface haul ways.

- Current employment – 950
- Post Expansion – 1,300 total employment after expansion
- Construction – 1,500 person years
- Capital Cost – $1.5 billion
- Full Production – 7.1 million tonnes annually – 2016

PCS Rocanville – The project consists of constructing two new shafts, expanding the mill and tailing facilities including structures to control ground water drainage.

- Current Employment – 460
- Post Expansion – 680
- Construction – 2,000 person years
- Capital Costs – $2.8 billion
- Full Production – 5.7 million tonnes annually – 2016

BHP-Billiton Jansen Project – The Jansen project involves the construction of a completely new mine and all associated operations including two new shafts, tailing facilities, mill and associated infrastructure such as water pipeline, port facility, rail spurs, roads, natural gas pipelines and electrical lines. Note the Jansen project is being built in three phases. The first phase will be completed in 2015 with all subsequent phases completed in 2025. Currently BHP has committed to what they term early works which includes a freeze collar for the shaft (capital cost is about $240 million). Currently a large camp has been established near Humboldt to support construction. Some significant costs such as the construction of a water pipeline are not included in their capital costs.

- Current Employment – about 50
- Employment Post Expansions – 1,045
  - Indirect Saskatchewan – 3,100
  - Indirect Canada – 8,000
- Construction – 1,500 per year over 10 years
  Peak at 4,200
- Capital Costs – $12 billion
- Taxes over project life – $93 billion
  - Saskatchewan – $60 billion

(Note BHP reports that construction will create another 2,400 person years of work elsewhere in Saskatchewan during construction, in addition to on-site work.)

4.3.6 – Current and Projected Potash Mining Employment Impact for the SEER

It is very difficult to forecast the future let alone current employment impact of potash mining for the region. Potentially Saskatchewan's mining sector could see as much as $43 billion in investment by 2028. Existing potash producers are already investing over $8 Billion not including potential "green field" mining projects such as BHP's proposed $12 Billion Jansen Lake project.

This section provides a range of potential impacts that could occur from potash mining development in the SEER.

Current Potash Mining Expansion Impact

While there have been several announcements regarding potential potash developments, only two projects are currently underway in the SEER and these are associated with Mosaic's Esterhazy site and the Potash Corporation of Saskatchewan's site near Rocanville. In both these cases, SEER would capture substantial portions of the employment benefits.

Pre Expansion Employment Impact					
	Direct Employment	SEER Employment Impact %	SEER Employment Impact #	Indirect/ Induced Employment	Total Employment
Mosaic	950	96.7%	919	1,761	2,680
PCS	460	80.0%	368	705	1,073
Total	**1,410**	**91.3%**	**1,287**	**2,466**	**3,753**
As % of Region's Employed Labour Force	**3.5%**	–	**3.2%**	**6.1%**	**9.3%**
Post Expansion Employment Impact					
Mosaic	1,300	96.7%	1,257	2,409	3,666
PCS	680	80.0%	544	1,043	1,587
Total	**1,980**	**91.0%**	**1,801**	**3,452**	**5,253**
As % of Region's Employed Labour Force	**5.0%**	–	**4.5%**	**8.6%**	**13.1%**
Net Gain	**570**	–	**514**	**986**	**1,500**

This table shows the employment impact that current potash mining expansions will have on the region. Potentially, once the current expansion programs for Rocanville and Esterhazy are completed, it could result in a further 1,500 new jobs for the region. The region's potash industry would have a major impact on the region's labour supply, accounting for as much as 13.1% of the region's current employment level of 40,200 jobs. Obviously the employment impact would be greater for communities such as Esterhazy, Langenberg, Rocanville and Moosomin that are close to potash mining operations, but also Yorkton which is the region's main service centre.

The foregoing estimate of employment impacts should be regarded as the maximum impact for SEER. Currently, PCS is drawing one-third of its new hires from Manitoba. The increasing level of Manitoba resident employment is in part due to an acute housing shortage in Saskatchewan communities that are close to PCS's mining operations. It is very challenging to recruit labour to the region due to the current housing shortage.

With regard to the direct and induced employment impacts generated by the industry, SEER will also likely see some leakage of these employment impacts to other areas of Saskatchewan and, in particular, Saskatoon, which is already providing goods and services to the mining sector. It is likely that SEER will retain 80% of the total employment impact. The challenge for SEER is to retain as much of the employment impacts as possible.

Potential Potash Mining Expansion Impacts

As indicated previously there are a number of potash exploration projects as well as rumours regarding further expansions by existing mining companies. Some of these projects are located outside of the SEER, near the SEER and within the SEER Region itself. It is difficult to say whether any or all of the current inventory of exploration projects will actually proceed to an operating mine.

Worldwide demand for potash is in the order of 50 million tonnes annually. As noted previously, world demand is expected to grow at over 4% a year or 2.0 million tonnes annually. Over the next 18 years world potash demand will more than double to 100 million tonnes annually. This is the principal motivation behind the industry's current expansion in Saskatchewan and elsewhere.

To service the projected world market growth for potash the potash industry will have to expand. New potash mines have an approximate cost of $1,500 or more per tonne. Typically a new potash mine has a cost of $3.5 billion and will produce 2 million tonnes per year and employ 300 to 350 people.

If Saskatchewan is to capture its historic share of future world demand for potash production at 30%, it will have to increase production by at least 15 million tonnes over the next two decades. This will require over 7 new mining projects or expansion of existing mines in the order of $3.5 Billion per project or a total investment of about $25 billion.

Regarding SEER, it would be reasonable to expect that the region could capture about one-third of this investment which would be the equivalent of two mines or a combination of new mine development and expansion of an existing mine.

The expansion already taking place at Rocanville and Esterhazy will address some of the potential demand for future potash production. For planning purposes, it could be reasonable to assume that SEER will see up to two to three major scale mining projects over the next 5 to 10 years, two located within the region and a third located near the western border of the region. The following table calculates the employment impacts that would result from new mine development.

Projected SEER Potash Mining Employment Impact 2010 to 2020

	Direct Employment	SEER Employment Impact		Indirect/Induced Employment	Total Employment Impact
		%	#		
Current (2010)	1,410	91.3%	1,287	2,466	3,753
Post Expansion (2016)	570	91.3%	514	985	1,499
New Mines (2016+)					
• Mine 1	350	100.0%	350	671	1,021
• Mine 2	350	100.0%	350	671	1,021
• Mine 3	350	15.0%	53	102	155
Total	**3,030**	**84.0%**	**2,554**	**4,895**	**7,449**

Potash mines typically draw their labour force from within 100 km of the plant. BHP's Jansen Lake site is 60 km from SEER's western border and 170 km from the Yorkton/Melville area. As a result the Jansen Lake project, should it proceed, would have a smaller impact on SEER. There are currently two to three projects near SEER's western border.

As noted in a previous section, there is some "leakage" (8.7%) of the employment impact associated with current potash mine operations in the Region. In the case of new mine development, we have assumed that they will be located further within SEER's boundaries such as near Melville, Yorkton and Bredenbury. As a result SEER should capture most of the direct employment benefits.

Should the foregoing developments all proceed, the employment impact from the region's expanding potash industry could double from current pre-expansion levels. Directly, employment would increase from 1,287 to 2,554 workers and the total employment impact would increase from 3,753 to almost 7,500 workers.

The foregoing should be regarded as the maximum employment impact. At present the only certain increase in the region's potash industry's operating employment will come from existing expansions. At the time of writing, no new potash mining projects have actually proceeded to an operational phase. Further, as noted previously, it is likely that SEER will only capture 80% of the total employment impacts with other provincial regions such as Saskatoon capturing the rest.

The development of a new potash mine can take five to seven years to proceed from a planning phase to an operational phase. As a result there will be sufficient lead time for SEER communities to do their own planning in response to new mine development.

5.0 How Will Potash Industry Expansion Impact SEER

This chapter of the report identifies how current and potential industry expansion could impact SEER. It is based on a combination of research and interviews with various key informants in the Region.

5.1 – The Region is Already Experiencing Growth

While SEER's total regional population has not experienced major population growth, some communities within the Region have been experiencing strong population growth since 2006. Yorkton, in particular, after years of little or no population growth, has increased its population by 15.2% to almost 20,000, with most of that growth occurring since 2008. While not as strong, communities located near potash mines such as Esterhazy (8.9%), Rocanville (12.8%) and Moosomin (7.1%) have also been growing since 2006.

The growth of the Region's population is relatively recent and is likely to continue. The Region's major project inventory, previously described, has continued to climb in value to $5.2 million in 2010. This is largely the construction phase and operational impacts will be occurring over the next two to three years.

The construction phase of the existing potash industry expansion, while large at over $4 billion has not had a major impact on communities. The employment impact has largely been confined to construction camps, all of which are temporary. The operating impact will not only be larger but also ongoing.

In general, the Region is still in a catch-up position from years of slow economic growth. This includes general infrastructure, office space, shopping facilities, transportation and housing. Regarding the latter, there has been little in the way of investment in apartment rental facilities since the 1960s and 1970s. Both commercial and residential vacancy rates in a number of communities are very low. (The residential vacancy rate in Yorkton is 2.5%.) Therefore, it could be reasonably argued that economic growth for the Region has yet to peak and could be sustained for the near future (up to the next five years).

5.2 – Potash is Not the Only Industry That is Impacting the Region

As noted in previous sections, major employment impacts will come from the ongoing operation of existing potash mines and the development of new ones. Further, potash expansions are impacting only certain communities that are largely within 100 km of existing mine sites.

At present most of the Region's employment growth is coming from the health care, construction and trade sectors. Major investments have been made in the agricultural processing sector with the construction of two major canola crushing facilities.

Communities like Yorkton have strengthened their position as a major regional trade and service centre for not only SEER but for Manitoba residents living close to the SEER. Major investments have been made in new retail and recreation and entertainment facilities (SIGA Casino).

5.3 – Potash Industry Expansion Will Further Impact the Region's Most Significant Issue – Labour Market Development

The following table compares population data over the period 2006-2010 for the Sunrise Health Care Authority. This health care region has similar boundaries to the SEER. As a result, the analysis of population data for the Sunrise Health Care Authority will be similar for SEER.

Saskatchewan Hospital Services Plan – Population Data for the Sunrise Health Care Authority			
	2006	2010	% Change
Saskatchewan	1,003,231	1,070,477	6.7%
Saskatchewan Population 20-44	334,992	358,670	7.1%
Sunrise Health Care Authority	56,199	56,807	1.1%
Sunrise Health Care Authority 20-44	15,943	15,715	(-1.4%)

As shown, Saskatchewan's population has increased from 2006 by 6.7%. More importantly, the population in the prime working age 20-44 has increased by 7.1%. The Sunrise Health Care Authority actually lost population in its prime working age group. In general the Region will have to increase the supply of labour through four possible courses of action:

- Reduce outmigration especially for youth
- Increase interregional/interprovincial migration
- Increase regional labour force participation, for example, from the Region's Aboriginal population
- Increase international immigration, which is comparatively low at this point

While SEER, as a whole, has not been experiencing growth in its labour force, communities more directly affected by the potash industry have been experiencing both population growth as well as growth in their prime working age populations.

Saskatchewan Hospital Services Plan – Population Data for Select Mining Centres

	2006	2010	% Change
Yorkton	17,006	19,588	15.2%
Yorkton Population 20-44	5,253	6,117	16.4%
Rocanville	1,024	1,155	12.8%
Rocanville Population 20-44	335	373	11.3%
Esterhazy	2,595	2,827	8.9%
Esterhazy Population 20-44	802	792	-1.2%
Moosomin	2,526	2,723	7.7%
Moosomin Population 20-44	775	810	4.5%

Source: Saskatchewan Hospital Services Plan – Covered Population.

Yorkton has one of the more dynamic local economies within the Region. It is experiencing in-migration and, more importantly, growing its prime working age population. As noted earlier, this is the result of a number of factors, not just the potash industry. In fact, Yorkton lies at the outer edge of the labour catchment area for the Region's current potash industry. Even with fairly robust population growth, government and non-government businesses are reporting skill shortages.

Labour supply will be a continuing issue for communities located closest to current mine sites. This is particularly the case for Esterhazy where its prime working age population has actually declined.

5.4 – Regarding Risk Assessment, Mining Companies Have Identified a Shortage of Skilled Labour as the Great Investment Risk

After years of little growth, the mining industry faces a major labour force challenge as it experiences strong growth. In particular, it is the retirement of an aging workforce that presents the single largest challenge. The industry is also facing challenges in attracting new entrants. The mining industry has an image problem with young people as being unsafe, dirty and often located in remote areas.

With regard to new developments or expansions, most mining companies report that labour supply represents the greatest risk management challenge. While Saskatchewan has enjoyed recent success in attracting workers from other provinces such as Alberta, that is changing. Mining investment in Saskatchewan has to compete with oil sands mining in Alberta for both construction and operating labour. Construction activity in Alberta's oil sands industry is approaching previous peak investment levels. Further oil prices are continuing to remain steady at over $80/barrel which is conducive to oil sands investment.

5.5 – An Expanding Potash Sector Will Present Opportunities for Greater Aboriginal Participation in the Region's Economy

Aboriginal people currently account for 11.8% of the Region's population or about 7,500 people. Approximately 76% of the Region's Aboriginal population is First Nations. By 2035 it is forecast that Aboriginal people will account for as much as 22% of the Region's population.

At present Aboriginal people do not have the same level of economic participation as is the case for the Region's non-Aboriginal population. The following table compares Aboriginal and non-Aboriginal labour force participation within the Region's existing mine site labour catchment area.

Comparison of Aboriginal and Non-Aboriginal Labour Force Participation

	Region	Aboriginal Population
Participation Rate	63.6%	55.8%
Employment Rate	60.5%	44.9%
Unemployment Rate	4.9%	19.9%

Source:

As shown in this table, the labour force employment rate for Aboriginal people is only 44.9% compared to 60.5% for the Region.

It is estimated that Aboriginal workers make up less than 3% of the Region's mining industry labour force. At the same time, as shown in the following table, the Region's Aboriginal population presents an opportunity to address the growing demand for labour within the Region's potash industry.

Population and Labour Force Profile Comparison

	Esterhazy Region	Aboriginal Population
Median Age	46.0 years	21.7 years
% of Population 15 Years of Age and Over	83.6%	61.6%
Labour Force Growth Rate – 2001-2006 (15 Years+)	(-2.4%)	6.8%

Source: Statistics Canada, 2001 and 2006 Census.

The expansion of the region's potash industry will also present procurement opportunities for Aboriginal business development. While over $4 billion is currently being spent by existing companies there will continue to be ongoing procurement opportunities.

5.6 – Mining Also Presents Procurement Opportunities for the Region

The general economic development view of the "mineral sector" is often limited to mining, and processing. Recently, economic development agencies have been expanding the core to include the supply chain concept. The supply chain includes the goods and services provided to the mineral sector. The percentage of sales made provincially at Rocanville indicates that about 50% of non-energy, transportation goods and services at mines are provided from the provincial economy. Enterprise Saskatchewan has recently commenced a provincial value change study.

The following are examples of mining supply chain impacts:

- Approximately half the rail traffic in Saskatchewan is linked to the potash industry.
- About half the power generated in the province is associated with coal. Some power is generated through cogeneration from waste heat at the potash mines.
- Saskatchewan based consultants and companies have built a number of mines outside Canada. Some consultants are known world-wide as experts in water management issues in mines.

- Much of the physical infrastructure developed in Saskatchewan is associated with mining. This includes a number of hydro sites such as the dams on the Churchill River.
- A number of manufacturer-built equipment for the mineral industry including ENS Toyota underground trucks.
- Much of Saskatchewan's construction sector impact is driven by mineral industry developments.
- Several of the potash operations result in by-product salt facilities.

Mining companies such as Mosaic and PCS have centralized procurement departments. Representatives of these departments are more than willing to undertake procurement seminars/workshops to engage potential regional/provincial suppliers. Many companies often use a metric to measure what percentage of the procurement is done provincially as another measure of corporate benefits impact. As an example, PCS Rocanville reports that it has spent $33 million on local purchasing which represents over 60% of total purchasing, exclusive of major expansions, raw materials and transportation.

It should also be remembered that procurement is ongoing. Construction supply/procurement is a one-time impact. Mining companies will spend up to $100 million annually just to sustain their capital investment in mining facilities.

The following are examples of ongoing mining supply chain requirements:

- Security
- Waste management
- Pumps
- Bearings
- Equipment
- Fabrication/welding services
- Electrical Services
- Construction services
- Work clothing
- Safety gear
- Training
- Earth moving /transportation equipment

Potash mining companies are also considering the adoption of Aboriginal procurement and benefits practices. This includes the consideration of Aboriginal content in the award of procurement contracts. Mining companies are also trying to engage Aboriginal businesses in their supply chain. As an example, security services for Mosaic's

Esterhazy mining operations are provided by Athabasca Security, with is owned by the Athabasca Basin Development Limited Partnership which is owned by First Nations located in Saskatchewan's Athabasca Basin. However, unlike the North, Aboriginal business development and the formation of Aboriginal economic development corporations had been much slower to develop in the south and in SEER.

5.7 – Current Education, Training and Upgrading Programs and Facilities Will Be a Barrier for the Region

The expansion of the Region's potash industry represents an opportunity, however, existing education, training and upgrading programs and facilities are a barrier for the Region in capturing this opportunity. The following sections examine the current capacity of the Region's education and training programs to meet the needs of an expanding potash industry.

There are five School divisions within SEER's boundaries. The predominant division is the Good Spirit School Division representing the majority of the region's residents.

Kindergarten to Grade 12 School Divisions within SEER	
	School Board
Good Spirit School Division	Public
South East Corner Stone	Public
Prairie Valley School Division	Public
Horizon School Division	Public
Christ the Teacher School Divisions	Separate
Source:	

The Good Spirit School Division covers the majority of the SEER area. With a head office in Yorkton the Good Spirit School Division is entirely located in the SEER area. The Division's capacity is approximately 5,800 students at 28 schools in 17 communities throughout the area. As of 2006 the region had been experiencing a decline in enrollments but has since seen increased enrollments back to 2006 levels. The region is currently growing in terms of overall enrollments, but it is in specific areas. Increases have been in communities such as Melville, Yorkton, and around the Esterhazy region. In Melville there has been some capital investment to expand school spots to accommodate growing enrollment. Yorkton is currently facing capacity pressure in some schools. In communities such as Esterhazy, Langenburg, and Saltcoats there have been enrollment increases, however, there remains excess capacity as the region had already seen years of declines in enrollment. Should this pattern continue eventually there will be capacity issues for communities located closest to current mine sites. This is particularly the case for Esterhazy where its prime working age population has actually declined, creating a demand for more labour and subsequent growth.

First Nations Schools

There are approximately 900 First Nation children attending K-12 schools in the Region. This includes both on and off reserve enrollment. The Yorkton Tribal Council is collaborating with other Treaty Four Tribal Councils (File Hills Qu'Appelle and Touchwood Agency) along with independent Nations and Chiefs such as Cowessess in a Treaty 4 Student Success Program to improve student outcomes through student retention, numeracy and community engagement. First Nations students are often disadvantaged in pursuing technical careers due to a lack of preparation in the subject areas of mathematics and sciences.

Education is a major barrier to Aboriginal youth in achieving successful labour market participation. Improving the school experience and outcomes provides a critical foundation for First Nations students to pursue further post-secondary education. The following shows that at present almost half the Region's First Nations population does not have a Grade 12 Diploma, a key requirement for employment in the potash industry and comparatively lower participation in apprenticeship and trades, an area of high demand for the Region's potash industry.

Comparison of Education Attainment		
	Region	Aboriginal Population
No Certificate, Diploma or Degree	37.5%	48.0%
High School Certificate	25.9%	20.3%
Apprenticeship/Trades	12.4%	8.7%
College	12.4%	13.0%
University Degree	7.3%	3.4%
Source: Statistics Canada – 2006 Census.		

Post-Secondary

Colleges in the region offer a host of credit and non-credit courses. Credit courses involve Saskatchewan Institute of Applied Science and Technology, provincial Universities, as well as on-site and off-site industry-based courses. The primary college in the region is the Parkland College with campuses in several centres in the area as well as some on-site industrial training. The following shows the location of post-secondary training facilities in the Region.

Post-Secondary Facilities in the SEER	
College	Community
Parkland Regional College	City, Melville
Parkland Regional College	City, Yorkton
Parkland Regional College	Town, Esterhazy
Parkland Regional College	Town, Canora
Southeast Regional College	Town, Moosomin
Southeast Regional College	Town, Moosomin
Southeast Regional College	Town, Whitewood
Academy of Learning	City, Yorkton
Saskatchewan Indian Institute of Technology	City, Yorkton
Source:	

Compared to other enterprise regions in the province with a similar population to SEER such as the North Central Enterprise Region and the South Central Enterprise Region (both of which have SIAST campuses), SEER has a lack of post-secondary programs and facilities. The biggest gap is the limited amount of training in the trades areas, especially high demand trades such as electrical and mechanical. These are major areas of demand for the potash industry. The development of new mines in the Region will increase the current supply-demand gap for industry training.

The Saskatchewan Indian Institute of Technology (SIIT) administers an Industrial Career Centre that focusses on upgrading, safety training, employment preparation and basic construction industry training. Just recently, the Centre has added a mining pre-employment program. SIIT's programs are all experiencing high demand with strong demand for upgrading and adult basic education.

The Parkland College has proposed the development of a Trades and Technology Centre to address the gap in industry training for the Region as a whole The proposed focus for the new campus is to expand delivery of advanced skill training in the areas of trades and technology such as construction, welding, industrial mechanics, power engineering, electrical and other trades training. It would require approximately 50,000 square feet of new space to accommodate classrooms, lecture theatre, information technology laboratory, meeting rooms/boardrooms. The estimated capital cost for the new Centre would be $25 million. The new facility would also offer teaching facilities for Practical Nursing and Bachelor of Nursing programs in partnership with the Sunrise Health District. The new facilities will also offer enhanced distance learning capabilities.

The new Centre will enhance Parkland's capacity to offer trades training at other locations in the Region such as at Esterhazy, where Parkland College is offering Industrial Mechanics Apprenticeship Training. This program is strongly endorsed by the potash industry.

Parkland College is also providing education and training to the Region's Aboriginal population – 45% of Parkland College's student population are First Nations students. First Nations students make up 44.5% of the College's adult basic education and skills training graduates and 25% of the College's university graduates.

5.8 – Housing is Another Barrier to the Region's Labour Force Development

The City of Yorkton has completed a fairly recent Housing Needs Assessment. It recognizes the historically high rate of population growth that city has been experiencing and the pressure that is being put on Yorkton's housing stock. The City is forecasting employment growth of 6,500 new jobs in the area due to the impacts created by the new canola crushing facilities, potential expansion of the potash industry in the region and possibly expansion of Parkland College's facilities over the next five years. That level of job creation could push the Region's population as much as 8,000 to 12,000 people.

Parkland College's expansion along with further off-reserve training for First Nations students will add further pressure for student housing. As a result a housing strategy should be coordinated with the Region's labour market strategy.

Yorkton's vacancy rate is very low at just 2.5%. There has been virtually no new apartment rental facilities built in the Region since the 1960s and 70s. Further, much of the existing stock needs updating. A lack of public transit also limits mobility in the community.

The City is currently considering the development of a 5-Year Community Housing Plan. The following priorities have been identified:

- Rental Housing (top priority)
- Entry-level Housing
- Student Housing
- Transitional/Accessible Housing
- Seniors Housing
- Subsidized Housing for Low-Income Families

Communities located next to existing potash mines such as Esterhazy, Rocanville and Moosomin are all feeling housing pressures. This also impacts the ability to attract skilled workers to these communities. As an example, the Sunrise Health District was able to recruit two new nurses for Esterhazy, but neither could find housing accommodation in the community.

Lastly, another trend affecting housing availability is the lack of homes coming on the market. Surveys of potash company employees have found that most employees are intending to stay in the area when they retire.

5.9 – Transportation and Public Safety Have Yet to Become Issues

We interviewed the RCMP regarding the current impact potash mining expansions are having on the region. In general there has been no noticeable increase in crime or traffic accidents. While the construction camps at Esterhazy and Rocanville are large, they are largely self-contained. At the outset of the establishment of these camps, the RCMP met with construction camp management and local bars/restaurants to develop a plan to minimize potential problems with alcohol and other criminal activities. As a result there have been very few incidents related to alcohol and drugs, such as DUI.

As noted previously, most of the area's potash is moved by rail. Originally, it was felt that when the mines were first developed road transportation of potash through Manitoba would be an option. While road may have competed with rail transportation at that time, today that has completely changed. We met with the Area Transportation Committee for the region. Generally it was felt that heavy truck hauls, for example, associated with construction activities, would have a west-to-east traffic flow. The Area Transportation Committee is willing to work with SEER to ensure that the region maintains a heavy truck haul corridor to support the potash mining industry's expansion over the next decade.

Lastly, air transportation for the region presents both an opportunity as well as a constraint at present. There are over 100 public airports in Saskatchewan. As shown below, the Yorkton airport is one of the top seven airports in the province based on annual aircraft activity.

Top Airports – Annual Aircraft Movements	
Airport	**Aircraft Movements**
Saskatoon	86,000
Regina	58,000
Prince Albert	26,000
La Ronge	18,000
Yorkton	**11,000**
Stony Rapids	10,808
Buffalo Narrows	7,500

The Yorkton airport is also a reasonably large employer with almost 40 jobs located at the airport. The airport also connects the region to the province's northern mining industry, Good Spirit Air Service, transports workers to northern mines.

SEER needs a regional airport facility to support the economy and corporate travel that is associated with investing in the region. However, the airport needs significant upgrades to function as a strong regional airport.

5.10 – Quality of Life and Attitude Are Important

In 2010 the Community Initiative Fund (CIF) commissioned a Quality of Life Study of Saskatchewan Communities (Saskatchewan Communities: A Quality of Life Study, February 2010 – Community Initiatives Fund). The study was actually a survey of how residents felt about various aspects of quality of life in their communities. The survey was done on a provincial and regional level. SEER communities were surveyed as a part of a larger southeast region.

Generally, southeast residents are quite happy with the quality of life they are experiencing in their communities. The following is a sampling of results:

Quality of Life Survey – Saskatchewan South East Communities	
• As an attractive place	79.1%
• Have access to indoor sport and recreation facilities	79.8%
• Have access to outdoor sport and recreation facilities	70.9%
• Overall satisfaction with community leisure facilities	55.0%
• Over the last 3 years community quality of life has stayed the same or improved	81.2%
• People want to move here from other places	61.6%
• The future for the community looks bright	56.2%
• Residents accept people from all ethnicities and cultures	54.2%
• Residents make visitors and tourists feel welcome	68.0%
• Residents have a strong sense that they belong here	64.8%
Source: Community Initiatives Fund.	

While the foregoing ratings regarding community quality of life in the region are scientific in that the survey was a representative sample, we also gathered anecdotal evidence that suggests, for the most part, most residents in the SEER have a very positive attitude about their community and are quite willing to promote their community as a place to live and work. This attitude is critical in attracting new workers and their families to the region.

There are examples of communities in Saskatchewan where even if the community is located near a large mining operation, it has not benefited either economically or socially. In these cases, attitude has played a role in the community not capturing benefits or being passed by for other communities. In SEER we did find communities that were taking proactive steps to plan and capture the benefits of potash mining expansion. These communities actively addressed issues like zoning, infrastructure and development approval processes. In these cases we spoke to developers about community attitude and heard comments such as "couldn't have found a more accommodating community".

6.0 Conclusions and Recommendations

After decades of virtually no growth, SEER's potash mining industry is undergoing a major expansion program. Over the current decade, employment in SEER's potash industry could double from 1,287 jobs to 2,554 direct jobs. The total employment impact in the region (direct, indirect and induced employment) could increase from 3,752 jobs to almost 7,500 jobs. This will have a major impact on the region. These impacts include the current expansion that is being undertaken by existing mines as well as the possibility of new mines being developed in and near the region. Even if only the existing expansions proceed, it will result in an additional 514 direct jobs. These are high paying jobs with average annual salaries exceeding $80,000. For SEER and its communities, the following conclusions and recommendations can be drawn from this report.

Labour Force Development Should Be a Top Priority for the Region

The biggest single challenge facing the region is labour force development. There are a number of factors at play here. Even without an expanding potash industry sector, the region will continue to face skills and labour shortages over the next decade. This is the result of demographic circumstances that will continue to impact not only SEER but Saskatchewan as well. A general housing shortage is another factor that is impeding labour market development, particularly for communities most affected by the current potash expansion program.

SEER has recognized the issue of labour market development for the region and has formed a Labour Market Committee. The Committee will need to focus on the following:

- Retaining the Region's youth
- Improving labour force participation rates, especially for the Region's Aboriginal population
- Increasing interprovincial migration
- Increasing international immigration

Youth Retention Will Require Real Engagement with the Region's Employers and Training Institutions

Saskatchewan's youth, and SEER is no exception, have tended to look outside the province for what they perceive to be employment and career opportunities. In general, Saskatchewan employers have not really focussed on the youth labour market that is already present in the regions in which they operate. There has been a real lack of engagement between employers and youth about career opportunities in their own backyard.

Saskatoon was one of the first regions to initiate a focused program that has been successfully linking industry, youth, post-secondary training/education and career development in the Saskatoon region. The Saskatchewan Industry Education Council is a successful model that SEER should emulate (see Appendix C).

Engaging the Region's Aboriginal Population in the Labour Market Will Require Significant Improvements in Educational Outcomes

As noted in this report, SEER already has a lower labour force participation rate than other regions. This is particularly true for the region's Aboriginal population which has an employment rate of 44.9% compared to 60.5% for the region.

While there are a number of contributing factors to the lower level of Aboriginal labour force participation, one of the principal contributing factors is education – half the region's Aboriginal population has less than a Grade 12 education. For most occupations, including the mining industry, Grade 12 is a minimum employment requirement. The Yorkton Tribal Council has recognized this through the implementation of a Treaty 4 Student Success Program. However, the program will need continuing support from various partners including industry.

SEER Should Also Focus on Attracting People from Outside the Region

Even with successful initiatives to retain the region's youth and improving Aboriginal education outcomes and labour force participation, it will not be sufficient to meet the region's future labour force requirements. As a result, SEER and the region's employers will also have to look outside SEER's boundaries. This includes:

- Attracting people from other regions
- Attracting people from other provinces
- Attracting people from other countries

It should be recognized that within Saskatchewan there is interregional migration. We have noticed, for example, smaller communities located near the potash industry have been successfully recruiting positions such as Town Administrators and their families from other small communities that are not experiencing the same level of growth.

SEER could also focus on recruiting residents who have left the region to return to what has become a dynamic regional economy with an excellent quality of life (see Community Initiatives Fund Quality of Life Study).

Lastly, one of the largest sources of labour supply growth has been international migration. Saskatchewan has been more successful with international as opposed to interprovincial migration. However, in the case of SEER international migration to the region has been low.

The Region Needs to Move to the Next Level in Providing Advanced Training Programs and Facilities

One of the most striking differences between SEER and other regions with similar populations is a lack of post-secondary training facilities and programs. Both the North Central (Prince Albert) and South Central (Moose Jaw) enterprise regions, have similar regional populations to that of SEER. Both those regions have a fairly large presence of post-secondary training facilities such as SIAST campuses.

SEER is lacking in post-secondary training facilities and programs. Currently, it cannot respond to the needs of the region's mining industry and the demand for such key occupations as electricians and industrial mechanics. Without post-secondary training facilities and programming, SEER will not be successful in retaining its youth or in attracting people to the region. Further, Parkland College is servicing a significant number of Aboriginal students. Without expansion and the development of new facilities such as the proposed trades and technology centre, Parkland will not meet education and skill development requirements of its Aboriginal clients.

The Region Requires a Housing Strategy

Housing is another barrier to labour force development in the region. Large employers such as the Sunrise Health Care Authority are facing challenges in recruiting employees as a result of housing shortages.

In the case of Yorkton, while there is a general housing shortage, there is a real shortage of student housing. This will also impact post-secondary training facilities and programs. Further, Yorkton does not have an adequate transit system which further aggravates housing issues.

There Should Be Ongoing Communication with the Region Regarding the Development of the Region's Potash Industry

In regard to new mine development, the region will have time to plan for new developments and their impacts. The lead time for a new potash mine is anywhere from 5 to 7 years. Having said that, it will be important for SEER to provide the region's communities with regular updates on the impacts of an expanding potash industry.

Appendix A – Specific Project Details, 2010, East Central ER

Sector	Phase	Location	Company	Project	Timetable Start	Timetable End	Value in $ millions
Commercial/Retail	1	Esterhazy	Canalta Real Estate	New Motel	2009	2010	$ 0
Commercial/Retail	1	Yorkton	Best Western	New Hotel	2009	2010	0
Power	1	Broadview	All Nations Energy Dev. Corp. (Cowessess and George Gordon FN)	New Wind Farm	2009	2011	300
Residential	1	Moosomin	Caleb Group	Seniors Complex	2008	2011	25
Industrial/Manufacturing	2	Esterhazy	Mosaic Potash	New Production Control Building	2009	2010	8
Infrastructure	2	Moosomin	Town of Moosomin	Sewage Lagoon Expansion	2009	2010	3
Infrastructure	2	Yorkton	City of Yorkton	Airport Runway Upgrades	2009	2010	3
Infrastructure	2	Whitewood	Town of Whitewood	New Water Treatment Plant	2009	2010	3
Mining	2	Esterhazy	Mosaic Potash	Potash Mine Expansion	2008	2010	1.584
Power	2	Tantallon	Northland Power Inc.	Natural Gas Power Station	2009	2011	145
Power	2	Moosomin	Red Lily Wind Power (Algonquin Power and Gaia Power)	New Red Jack Wind Farm	2009	2011	60
Recreation/Tourism	2	Moosomin	Town of Moosomin	Addition to Moosomin Communiplex	2009	2011	2
Residential	2	Moosomin	Kin Place Phase II	Seniors' Life Lease Condos	2008	2011	2
Mining	2/3	Rocanville	Potash Corp. of Saskatchewan	Potash Mine Expansion	2008	2012	2,800
Commercial/Retail	3	Moosomin	Canalta Hotels	New Hotel	2008	2010	9
Commercial/Retail	3	Moosomin	Borderland Co-op	Expansion – Convenience Store/Cardlock/Car Wash	2009	2010	5
Industrial/Manufacturing	3	Yorkton	WalMart Canada	Super Centre Expansion	2009	2010	0
Industrial/Manufacturing	3	Yorkton	Richardson International Ltd.	Canola Crushing Plant	2006	2010	165
Infrastructure	3	Yorkton	Morris Industries	Plant Expansion and Water Treatment Plan Distribution System	2009 and 2002	2010	2 40
Infrastructure	3	Yorkton	City of Yorkton	New Fire Hall	2008	2010	8
Infrastructure	3	Yorkton/Melville	Canadian National Railway	Rail Line Improvements	2009	2010	7
Power	3	Rocanville	SaskPower	PCS Rocanville 128kV Service	2010	2010	6
Recreation/Tourism	3	Melville	City of Melville	Community Centre Complex	2002	2011	25
Residential	3	Yorkton	McDiarmid Holmes	Condominium Project	2007	2010	6

Appendix B – Saskatchewan Mining Association and the Mining Industry Human Resource Council – Saskatchewan Mining Industry Hiring Requirements and Talent Availability Forecasts – 2011

This Appendix presents an occupational breakdown of hiring requirements and available talent. All numbers represent cumulative counts over a 10-year horizon to 2021. Cumulative hiring requirements represent the sum of changes in employment, retirement and non-retirement exits. Available talent is calculated as the share that mining historically attracts from the talent pool for all sectors, for each occupation. Cumulative hiring requirements are subtracted from mining's available talent to estimate the looming talent gap.

In Table D1 below, the column titled "The Challenge" shows the available talent pool for all industry sectors and mining's historic share of Saskatchewan's labour pool for each occupation. For each occupational category, an estimate is provided of the share of the labour pool that mining will need to attract to meet projected hiring requirements.

Table D1
Cumulative Occupational Breakdown of Hiring Needs and Available Talent*
To 2021

	THE NEED	THE SUPPLY AND GAP		THE CHALLENGE		
	CUMULATIVE HIRING REQUIREMENTS	TALENT AVAILABILITY – MINING'S SHARE	GAP	TOTAL AVAILABLE TALENT ALL SECTORS	MINING'S CURRENT SHARE OF TALENT	MINING'S REQUIRED SHARE OF TALENT
TRADES AND UNDESIGNATED OCCUPATIONS						
Underground production and development miners	835	595	-240	625	95%	
Heavy equipment operators (except crane)	735	565	-170	2,295	25%	
Truck drivers	630	550	-80	6,845	8%	
Construction millwrights and industrial mechanics (except textile)	550	440	-110	1,215	36%	
Heavy-duty equipment mechanics	395	345	-50	1,385	25%	
Welders and related machine operators	210	225	15	2,920	8%	
Mine labourers	210	130	-80	135	96%	
Industrial electricians	185	120	-65	330	37%	
Underground mine service and support workers	170	155	-15	160	98%	
Construction trades helpers and labourers	160	125	-35	2,855	4%	
Material handlers	145	110	-35	2,215	5%	
Central control and process operators, mineral and metal processing	125	315	190	345	91%	

* The forecasting model builds upon the model developed for MiHR's *Canadian Mining Industry Employment and Hiring Forecasts*, 2010. MiHR's current forecasting model is the result of an iterative continuous improvement development driven by MiHR labour market research activities. The current model differs from the model used to produce the 2008 report and direct comparisons between the two forecasts are to be avoided or made only at a high level. For example, the new model includes more customization for Saskatchewan specific factors (commodity mix and the addition of productivity measures).

	THE NEED	THE SUPPLY AND GAP		THE CHALLENGE		
	CUMULATIVE HIRING REQUIREMENTS	TALENT AVAILABILITY – MINING'S SHARE	GAP	TOTAL AVAILABLE TALENT ALL SECTORS	MINING'S CURRENT SHARE OF TALENT	MINING'S REQUIRED SHARE OF TALENT
Steamfitters, pipefitters and sprinkler system installers	90	80	-10	460	17%	
Drillers and blasters – Surface mining, quarrying and construction	80	70	-10	120	57%	
Crane operators	80	45	-35	135	32%	
Machine operators, mineral and metal processing	80	75	-5	135	56%	
Other trades helpers and labourers	60	10	-50	230	4%	
Labourers in mineral and metal processing	60	40	-20	95	44%	
Carpenters	50	40	-10	2,460	2%	
Plumbers	30	30	0	905	3%	
Total	**4,890**	**4,065**	**-815**	**25,865**	**15%**	**19%**
PROFESSIONAL AND PHYSICAL SCIENCE OCCUPATIONS						
Civil engineers[22]	245	0	-245	715	0%	
Geologists, geochemists and geophysicists	165	160	-5	350	46%	
Mining engineers	145	155	10	190	83%	
Mechanical engineers	115	55	-60	455	12%	
Electrical and electronics engineers	75	40	-35	560	7%	
Geological engineers	55	20	-35	35	49%	
Other professional occupations in physical sciences	40	15	-25	20	58%	
Chemical engineers	40	25	-15	140	18%	
Industrial and manufacturing engineers	35	25	-10	290	8%	
Biologists and related scientists	25	20	-5	730	3%	
Other professional engineers, n.e.c.	25	0	-25	60	0%	
Chemists	10	20	10	220	9%	
Metallurgical and materials engineers	10	0	-10	2	0%	
Total	**975**	**535**	**-450**	**3,767**	**14%**	**26%**

22 According to MiHR's survey of SMA members, the number of civil engineers employed by the mining industry has increased markedly; the majority having been hired since January 1, 2008. In addition, anecdotal evidence suggests that civil engineers are being used in other engineering roles by mining employers in efforts to utilize transferable skills set for hard to fill roles.

	THE NEED	THE SUPPLY AND GAP		THE CHALLENGE		
	CUMULATIVE HIRING REQUIREMENTS	TALENT AVAILABILITY – MINING'S SHARE	GAP	TOTAL AVAILABLE TALENT ALL SECTORS	MINING'S CURRENT SHARE OF TALENT	MINING'S REQUIRED SHARE OF TALENT
HUMAN RESOURCES AND FINANCIAL OCCUPATIONS						
Financial auditors and accountants	80	50	-30	2,410	2%	
Human resources managers	40	25	-15	350	7%	
Specialists in human resources	25	15	-10	575	3%	
Financial managers	10	0	-10	730	0%	
Financial and investment analysts	10	10	0	370	2%	
Total	**175**	**100**	**-65**	**4,435**	**2%**	**4%**
SUPPORT WORKERS						
Secretaries (except legal and medical)	230	130	-100	3,300	4%	
Inspectors in public and environmental health and occupational health and safety	70	50	-20	380	13%	
Administrative clerks	60	35	-25	1,450	2%	
Dispatchers and radio operators	55	40	-15	440	9%	
Cooks	15	15	0	4,130	>1%	
Production clerks	10	10	0	160	5%	
Engineering inspectors and regulatory officers	10	0	-10	20	0%	
Construction estimators	10	0	-10	75	0%	
Inspectors and testers, mineral and metal processing	10	5	-5	20	34%	
Transportation route and crew schedulers	0	0	0	30	0%	
Total	**480**	**285**	**-185**	**10,005**	**3%**	**5%**

	THE NEED	THE SUPPLY AND GAP		THE CHALLENGE		
	CUMULATIVE HIRING REQUIREMENTS	TALENT AVAILABILITY – MINING'S SHARE	GAP	TOTAL AVAILABLE TALENT ALL SECTORS	MINING'S CURRENT SHARE OF TALENT	MINING'S REQUIRED SHARE OF TALENT
TECHNICAL OCCUPATIONS						
Drafting technologists and technicians	260	25	-235	550	4%	
Geological and mineral technologists and technicians	180	95	-85	180	52%	
Land surveyors	170	30	-140	185	17%	
Chemical technologists and technicians	115	85	-30	725	12%	
Civil engineering technologists and technicians	90	0	-90	95	0%	
Mechanical engineering technologists and technicians	90	30	-60	160	20%	
Land survey technologists and technicians	80	5	-75	75	7%	
Electrical and electronics engineering technologists and technicians	75	15	-60	290	5%	
Industrial engineering and manufacturing technologists and technicians	45	10	-35	95	12%	
Mapping and related technologists and technicians	25	0	-25	150	0%	
Biological technologists and technicians	20	0	-20	455	0%	
Total	**1,155**	**295**	**-855**	**2,960**	**9%**	**39%**
SUPERVISORS, COORDINATORS, AND FOREMEN						
Primary production managers (except agriculture)	325	345	20	510	68%	
Supervisors, mining and quarrying	315	150	-165	155	95%	
Engineering managers	60	5	-55	110	4%	
Contractors and supervisors, mechanic trades	55	40	-15	310	12%	
Construction managers	35	10	-25	575	2%	
Supervisors, mineral and metal processing	25	25	0	55	42%	
Contractors and supervisors, pipefitting trades	20	10	-10	60	17%	
Total	**835**	**585**	**-250**	**1,775**	**32%**	**47%**

Source: Mining Industry Human Resources Council, Spring 2011

APPENDIX D: PARKLAND COLLEGE SKILLS TRAINING PROGRAM PLAN 2012-2013

PROGRAMS	NEW/ EXISTING	2012-2013	NUMBER OF STUDENTS
BUSINESS			
Business Administration	Existing	Bus 1	26
Business Year 2 – Accountancy	Existing	Bus 2 Diploma	12
Insurance/Financial Bus Programs	In Dev.		
Agribusiness/Agri-management	In Dev.	In development with a Needs Assessment	
Computer Technician	In Dev.	Computer Technology – upgrading	12
Office Education	Existing	Office Ed	16
Office Administration – Part-time	New	PT Office Ed	10
Business SIAST Adm Diploma and Business Certificate – Fort Qu'Appelle	New	Bus Adm year 1 – Needs Assessment	12
Extension of Office Ed - Medical	In Dev.	Office Ed – Medical Transcriptionist – Health Information	16
Leadership Training – U of R	Existing	Leadership	30
Project Management – U of R	Existing	Project Management	16
U of R – Certificate in Local Gov't Authority		Needs Assessment	
CID/ Bus Industry Program - online	Existing	CID	10
Computer Training (In-service)/CAD	Existing	Computer Training – On Demand	16
Retail Manager /Hospitality/Resort Management	New	Hotel Resort Management – Centennial College	30

HEALTH			
CCA	Existing	CCA	16
CCA Fort (PT - SIIT)	Existing	CCA	12
CCA Part Time (Kelvington, Canora & Yorkton)	New	CCA PT – Canora/Yorkton	8
Practical Nursing # 8 / # 9	New	PN # 9	21
Primary Care Paramedic	Existing	PCP	12
Intermediate Care Paramedic/Advanced Care Paramedic	New	ICP/ACP – up-skilling	12
EMR (Fire Fighters)	Existing	EMR (Fire Fighters)	20
Early Childhood Education – Orientation – Fort Qu'Appelle	Existing	OCDC – Fort Qu'Appelle	12
Early Childhood Education – Certificate classes – Fort Qu'Appelle	Existing	Early Childhood Daycare PT	12
Early Childhood Education Certificate – Region	Existing	ECE Regional PT Cert	12
Early Childhood Education – Region (FT & PT)	Existing	OCDC – Yorkton	15
Educational Assistant (ACC – PT) or Human Services Program	New	Modified Educational Assistant or Human Services	10
STEC/Industrial – Entry Level	New	STEC – Entry Level – On Demand (project based)	15
Emergency Planning		Emergency Planning	10
Fire Fighting Training 1001 - Melville	Existing	Fire Fighting (1 intake)	16
Firefighter Instructor Qualification 1041	Existing	NFPA 1041 (2 intakes)	20
Firefighter Training – NFPA 1081 Industrial	Existing	Firefighter – Industrial NFPA 1081	60
Firefighting Training - other programs	Existing	Fire Fighting Upgrading	24

Law Enforcement Preparation/Criminology	Existing		
Peace Keepers	In Dev.	Peace Keepers – in development	12
Security Training	New	Security Training	10
Pharmacy Tech – Upgrading	In Dev.		
CLX Training – combined Lab and Xray Technician Program or Lab Tech	In Dev.	CLX Training – Needs Assessment – in development	
Environmental Reclamation Technician	In Dev.	Environmental Reclamation Technician – Needs Assessment	
APPRENTICESHIP			
Industrial Mechanics Level 1 Apprenticeship	Existing	Ind Mech Level 1	12
Industrial Mechanics Level 2 Apprenticeship	Existing	Ind Mech Level 2	13
Industrial Mechanics Level 3 Apprenticeship	Existing	Ind Mech Level 3	13
Industrial Mechanics Level 4 Apprenticeship	Existing	Ind Mech Level 4	24
Industrial Mechanics Journeyperson Upgrading Tutorial	New	Tutorial for SATCC on-line delivery	6
Welding Journeyperson Upgrading	Existing	Welding upgrading	10
TEC (Trade Employment Connections)	Existing	TEC Program	36
TRADES & INDUSTRIAL			
Intro to Trades Cluster Courses (Construction, Mechanical, or Industrial)	New	Intro to Industrial Trades Cluster – in development	
Intro to Trades Courses	New	Intro to Machining Trade	10
Plumbing & Pipefitting Applied Certificate	New		
Carpentry Applied Certificate	Existing	Carpentry Applied Certificate	12
Welding Applied Certificate Enhanced (including CWB Test & Metal Fab)	Existing		

Multi-Mechanical Program (Heavy Duty, Ag Machinery, Automotive, & Truck/Transport)	Existing	Multi-Mechanical Program	10
WTTI Crane & Hoist Pre-Employment	New	WTTI Crane & Hoist	10
Power Engineering 4th Class Tutorial	New	Power Eng. 4th Class Tutorial	6
Power Engineering 4th Class F/T	Existing	Power Eng. 4th Class F/T	12
Power Engineering 3rd Class F/T	Existing	Power Eng. 3rd Class F/T	14
Power Engineering 2nd Class Online Tutorial	New	Power Eng. 2nd Class Online	6
Power Engineering 5th Class Tutorial	Existing		
Power Engineering Fireman's Tutorial	Existing	Fireman's Tutorial	18
Construction Trades Exploration - Essential Skills Project (Yorkton)	New		
Construction Trades Exploration - Essential Skills Project (Kamsack)	New		
INDUSTRIAL & AG			
Heavy Equipment Operator	Existing	HEO – TBA	12
Heavy Equipment Operator Essential Skills Project (Cote F.N.)	New		
Professional 1A Truck Driver Training	Existing	Pro Truck Driving (WTTI Crane & Hoist)	6
Band Housing Maintenance (First Nations)	New	Band Housing Maintenance (F.N.) – in development	
Agricultural Production Worker (First Nations)	New		
Robotics & Programmable Logic Controls (PLC)	New	Robotics & PLC – in development	
OTHER TRAINING			
Mosaic Contractor Orientation	New	Contractor Orientation	1500

LEAN (Operational Efficiency Model)	New	LEAN Seminars – in development	
O.H. & S. Safety Training	Existing	Safety Training	1700
Recycling Technician	New	Recycling Technician	On Demand
Trades, Industrial & Ag Credit/Non-Credit Up-Skilling	Existing	Trades & Industrial Credit/Non-Credit Up-Skilling	80
Water/Wastewater & CEU Training	Existing	Water/Wastewater & CEU	30
Driver Training (5G01, 2A, 3A, air brake)	Existing	Driver Training	On Demand
Ag Short Courses (grain marketing, pesticide, etc.)	Existing	Short Ag Courses 1-2 courses	10
Heavy Equipment Operator Upgrading	Existing		
Trades, Industrial & Ag CID (welding, machine shop, small engine, etc.)	Existing	TIA CID Classes (1-3 classes)	12

EXPECTED NUMBER OF STUDENT OPPORTUNITIES – 4,097

Appendix E: Partner Contact Information

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YOUR Answer...