



The City of
Welland

**COMMUNITY
ECONOMIC DEVELOPMENT
STRATEGY**

A COMMUNITY ECONOMIC DEVELOPMENT STRATEGY FOR THE WAY FORWARD



NOVEMBER 2004

In partnership with

Canada 



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MESSAGE FROM THE MAYOR



*OFFICE OF THE MAYOR
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I am excited with the release of our new community strategy. This highly-anticipated plan has been in the works for nearly one year and is a collaborative effort of a wide variety of community stakeholders. We now know what actions we must take to revitalize our local economy.

With the input we received at public meetings, we now have a direction for the city and have determined the business sectors that will bring prosperity back to Welland. Improving the quality of life for our citizens was identified as one of the keys to our success and just makes good business sense.

In moving forward, we must build upon Welland's strengths, such as Niagara College and our skilled labour force, while continuing to support the many existing small and medium-sized businesses that contribute to this city.

This is a plan that we can all be very proud of, and I extend my thanks to everyone who had a role in producing it. I look forward to working with all stakeholders as we implement our innovative community economic development strategy.

Damian Goulbourne
MAYOR

ACKNOWLEDGEMENTS

This report was commissioned by the City of Welland's Economic Development and Tourism Department and made possible through funding provided by the City, Human Resources and Skills Development Canada, the Ontario Ministry of Economic Development and Trade, the Regional Municipality of Niagara and Venture Niagara.

The process for developing the City's economic growth strategy was led by the Welland Community Economic Development Strategy Committee. Human resources issues were addressed by the Welland Labour Market Strategy Committee. A list of these volunteers is provided in the appendices. As well many community stakeholders participated in consultations to provide valuable input and recommendations for strategic growth. We are grateful for this invaluable contribution from representatives of the community.

The Welland Community Economic Development Strategy was authored by Dr. Emanuel Carvalho from the University of Waterloo, Barbara Fennessy of Niagara Economic and Tourism Corporation and Valerie Kuhns of Kuhns Partnership. The development of the strategy took place in collaboration with Dan Degazio, Manager of Economic Development and Tourism for the City of Welland and Travers Fitzpatrick, City Manager.

We would like to acknowledge the support of Tom Bearss, Consul and Senior Trade Commissioner for the Canadian Consulate General in Buffalo, John Monahan, Investment Officer with Ontario Ministry of Economic Development and Trade in New York, and Denis Donovan of The Wadley Donovan Group in New York for their contribution to our investment marketing initiatives.

The success of any community economic development strategy requires unequivocal leadership. Mayor Damian Goulbourne has championed this initiative and actively worked with committee members and staff to map a way forward for Welland.

This strategy belongs to the community. Its fundamental purpose is to foster new growth opportunities that position Welland for future prosperity and community well-being.

The Welland Development Commission and City of Welland has made every effort to ensure that the information in this report is accurate. The Commission and City of Welland does not guarantee the correctness of the data or information nor does it assume any liability for errors or omissions.

EXECUTIVE SUMMARY

The City of Welland has completed a new community economic development strategy aimed at strengthening the city's socio-economic well being and quality of life. This strategy will serve as a guide for community initiatives aimed at building a more stable and diverse economic base in Welland.

The community development initiative has been guided by community leaders including a Welland Community Strategy Committee with representation from the Welland Development Commission, City council and broad representation from community organizations, the private sector, and labour interests. Mayor Goulbourne has championed the development of this plan and is committed to its implementation. It was adopted by council on November 16, 2004.

Dr. Emanuel Carvalho from the University of Waterloo, and Barbara Fennessy and Valerie Kuhns from Niagara Economic and Tourism Corporation served as consultants to the City of Welland's economic development office, working closely with Dan Degazio, Manager of Economic Development and Tourism, and with the steering committee. This planning initiative was developed in partnership with Human Resources and Skills Development Canada, the province of Ontario, the Regional Municipality of Niagara and Venture Niagara.

Through an open process of information and situational analysis, community consultation and critical reflection, the City has carefully examined strategic options for building a vibrant community. Included in this analysis is a labour market assessment completed with input from a Labour Market Strategy Committee, with region-wide representatives from employment and social service organizations, cultural groups, education, union leaders and private sector human resource managers. Together, community stakeholders have formed a strong partnership to undertake the challenge of mapping Welland's economic revitalization.

Traditionally, Welland's economy has relied significantly on manufacturing, and despite losses in recent years this sector remains critical for the City today.

Manufacturing has historically been the city's largest employment sector with a total of 5,145 jobs in 2001. Although major expansions have taken place within companies such as John Deere Welland Works and Bosch Rexroth Canada Inc., overall the sector has declined by more than 30% since 1996. Since 2001, losses of over 1,000 manufacturing jobs have been experienced in Welland. To some extent, this decline has been offset by gains in the service sector, in transportation, contact centres and financial services, and retail. Recently, tourism has also gained increased focus for development.

Partnership, consultation and research were all key elements for building an effective strategy for moving Welland forward. Strategies for diversifying and strengthening Welland's economy are the product of an extensive process involving industry trend analysis, community stakeholder meetings, an international study of community development strategies, and a detailed examination of Welland's labour market.

A competitive analysis of industries in Welland was undertaken in 2001 by Dr. Emanuel Carvalho from the University of Waterloo, and updated in 2003. The analysis suggests that Welland continues to have competitive advantages in transportation equipment manufacturing, machinery manufacturing and fabricated metal product manufacturing, as well as several service industries.

Community stakeholder meetings brought together representatives from industry clusters to identify opportunities and challenges for future growth. Major community strengths identified include a strong concentration of transportation equipment and supplier industries, specialization in contact centers and financial services, and significant assets like the Welland Canal for building a sports tourism and recreation industry. Among the major issues impeding economic growth include high industrial taxes, provincial tax policy, poor transportation infrastructure, and an urgent need for downtown revitalization and labour force development.

In an increasingly knowledge-based economy, labour force development is a critical factor contributing to successful economic transformation. Welland's

labour force is drawn to a large extent from across the Niagara Region. To help ensure that labour force development is keeping pace with evolving industry requirements for skills and knowledge, the City will continue to encourage participation in collaborative networks that facilitate the exchange of knowledge, ideas and skills, formal and informal learning, and will improve utilization of people's talents in order to reduce unemployment and underemployment of Welland's labour force.

Eleven communities were selected based primarily on the composition of their economic structure. All are historically similar to Welland, and in most cases, currently or previously have experienced a significant dependency on the steel industry. Following the decline of that industry, they have faced challenges of economic restructuring similar to those occurring in Welland today. Most of the communities have been left with the same legacy of brownfield sites, decreased manufacturing employment and an aging workforce. Industry downsizing due to global competition, trade liberalization and changing technology have prompted their development of strategic plans for economic transformation and community revitalization. Best practices and lessons learned were applied to Welland's Community Economic Development Strategy.

The City of Welland, in partnership with Niagara Economic and Tourism Corporation, undertook exploratory investment missions to New York City, Pittsburgh, Chicago and Buffalo to build awareness of Welland as an attractive location for new business investment and to build relationships with site selectors, trade commissioners and investment officers. At the same time, an important objective of these meetings was to identify current trends regarding investment inquires, to inform Welland's development strategy.

The final step in the strategic development process involved the creation of a ten-point plan that builds on Welland's strengths and opportunities for community economic development. The plan also addresses key issues and impediments to economic growth. But, it does not stand alone. This strategy serves as a strategic policy document that is integrally linked to the City's

corporate strategic plan for future development. It proposes a framework for improving Welland's long-term competitiveness and quality of life in the community. It calls for commitment to collaborative action by the private sector, labour groups, volunteer organizations, and all levels of government.

SECTION ONE: DEVELOPMENT STRATEGIES: A TEN POINT PLAN FOR MOVING WELLAND FORWARD

INTRODUCTION

The Welland Community Economic Development Strategy is directed at building a vibrant, dynamic city, with a solid and diversified economy. The strategy is driven by strong leadership and supported by collaborative partnerships among community stakeholder groups. It is a long term commitment requiring ongoing leadership, resources, partnership, and community collaboration. This community economic growth strategy focuses on competitive strengths within the community as well as new opportunities for prosperity. The ultimate goal of economic development is to continuously improve the quality of life for the people within the community.

WELLAND COMMUNITY ECONOMIC DEVELOPMENT STRATEGY

1. **Build on Competitive Strengths and Promote Economic Diversification**

Welland must build on its competitive strengths and community assets to diversify its economic base and stimulate the growth of high quality jobs, new wealth and investment. This involves devoting the necessary resources to grow and nurture innovative industry clusters related to its competitive advantages and local strengths, including:

- ***Transportation Equipment and Linked Industries***
- ***Communications and Financial Service Industries***
- ***Sports Tourism and Recreational Industries***

(Please see cluster profiles at the end of this section of the report)

The objective is to create, apply and assess on a regular basis, effective initiatives directed at retaining, expanding, creating, and attracting firms within each cluster. In order to achieve this, the following initiatives are recommended:

- i) For each cluster, create an *Investment Marketing Program* that specifically targets locations and companies identified as prospects capable of contributing to the growth and diversification of each cluster.
- ii) Encourage the development of *Cluster Networks* that bring together key stakeholders among linked industries. Through these networks, participants benefit from the exchange of ideas, sharing of knowledge and technology, and discussion of key issues impeding growth of business and industry. The City of Welland's economic development

and tourism office will expand its *Captains of Industry* program to support these networks.

- iii) Enhance the City's *Business Retention and Expansion* program designed to improve the competitive position of participants in each cluster, while exploring the possibility for the creation of new and expanded business opportunities.
- iv) The City of Welland must champion the development of critical infrastructure support systems that will help to ensure successful diversification of the local economy, brought about by stronger performance of the clusters.

2. Focus on Quality of Life

Welland's unique character can be attributed to its heritage and its cultural diversity. The Welland Canal plays a key role in defining the community's history and enabling current and future recreational development. Residents benefit from a very reasonable cost of living in Welland, with affordable housing, safe, clean neighbourhoods, and access to a wide range of local and regional amenities such as wineries, golf courses, and sports facilities. These assets are crucial in designing programs directed at retaining, expanding, creating and attracting business and talent.

Just as quality of life is a top priority for the City, quality of place is also very important for attracting people and business investment. The downtown core is typically the first place people visit when exploring a community, and should therefore be a priority for Welland's economic development. Marketing initiatives should emphasize the ethnic and cultural richness of the City, for example, its Francophone community.

3. Forge Stronger Linkages Between Education, Business And Industry

Stronger linkages are needed between education, business and industry. On the one hand, training and education programs at Niagara College and Brock University should be designed to accommodate the changing workforce development needs of local business and industry, as well as emerging labour market requirements. On the other hand, employers must be willing to commit to providing critical work experience for apprenticeships and co-op placements.

Cluster networks should include representatives from education to ensure ongoing communication of training and education needs. Where programs or resources are not feasible at a local level, partnerships with other educational institutions such as Mohawk College and McMaster University should be developed through strategic industry partnerships.

4. Develop a Community Labour Market Partnership

The development and employment of people's talents is central to economic development in the new economy. Labour force development is a necessary condition for successful economic development. Beginning with the existing labour force, work structures should be designed to better utilize the wealth of talent within the community. Emphasis should be placed on programs that enhance the available pool of skilled labour, including fuller employment of youth, foreign-trained professionals, women, and persons with disabilities.

Particular issues relating to impending skilled trades shortages must be addressed through increased employer participation in apprenticeships, improved retention of newcomers, and support for business-education partnerships.

Welland's economic transformation from a predominantly manufacturing economy to a more service-oriented economy has resulted in substantial displacement of workers. While these workers represent an enormous talent resource and possess transferable skills acquired through workplace learning,

many also need to develop new skills for emerging occupations. Information about prior learning assessment and recognition programs (PLAR) should be promoted to facilitate recognition of both formal and informal learning. Gaps between educational levels or skills levels and emerging jobs need to be identified to ensure relevant programs are developed and marketed.

Within the next decade, business and industry will experience the loss of many workers through retirements. Programs should be developed to ensure companies are planning for the significant impact of the aging labour force. Employment opportunities for Welland's post-retirement community should also be considered, given the wealth of expertise, talent and skills among this group.

5. Promote a Culture of Innovation across all Sectors

Across all industries and community organizations, innovation is an essential ingredient for sustaining competitive advantage and achieving prosperity. Welland's Business Retention and Expansion program should address opportunities for promoting research and development initiatives through programs such as the Industrial Research Assistance Program. Cluster networks often provide opportunities for technology transfer and informal learning. New technology, capital investment, and work force development combine to enhance productivity, competitiveness and quality of work life.

6. Secure Community Leadership

The commitment and support of the community, beginning with its political and business leaders is critical for promoting the diversification and stability of Welland's economy. Leadership involves accepting the responsibility for implementing Welland's Community Economic Development Strategy, and ensuring the necessary conditions for development and growth.

This entails:

- i) Council devoting the necessary human and financial resources to achieve a balanced and holistic approach for moving forward.
- ii) Addressing key issues and accountability through various City departments and their partners, including downtown revitalization, transportation infrastructure, taxation and spending programs and land development, including brownfields.
- iii) Ensuring collaborative leadership to successfully create cluster networks. Community organizations such as the City's Economic Development office, Tourism of Welland Niagara, the Chamber of Commerce, Venture Niagara, and Welland Recreational Canal Corporation must work together to support the development of these clusters.
- iv) The private sector championing the development of cluster-specific priorities, including labour force development.
- v) Improving relations with all levels of government to ensure representation of community priorities at a policy level.
- vi) Fostering stronger ties with foreign communities of interest to promote business development and trade opportunities.

7. Source Development Funding

Funding is essential for ensuring that local conditions are established to stimulate business investment and growth. A unified approach directed at various levels of government strengthens the community's potential for securing financial support. Development priorities that require immediate funding

assistance include downtown revitalization, brownfield remediation, and labour force and skills development. Although much can be accomplished through community leaders, dedicated human and financial resources are critical for implementing Business Retention and Expansion programs, Investment Attraction programs, promoting research and development investment, and generating new cluster development, for example, Sports and Recreational Tourism.

8. Inspire Community Ownership and Strengthen Community Partnership

The successful implementation of a strategic economic development plan for the City of Welland requires the full support and participation of all community stakeholders. The City is committed to ongoing communication and consultation throughout the implementation of this strategy. Business leaders, business associations, public sector agencies and City Council all play a major role in strengthening the community's economic future.

Partnerships are important for bringing together the interests in the community and for sustaining balanced economic growth. Strategic priorities for economic development should drive partnership development. The focus for these partnerships is to secure support, mobilize resources, and ensure commitment from the public and private sectors, as well as volunteer organizations.

Support for business-education partnerships is crucial. Together business and education must address ongoing needs for developing talent within the community.

9. Develop Structural Supports

Programs designed to promote local economic diversity and growth must be accompanied by the development or upgrading of infrastructure. Physical infrastructure needs range from available, serviced land and buildings to multi-modal transportation systems.

As part of Welland's strategic economic development, it is imperative that the City's existing physical infrastructure be renewed, including roads, sewer, water and hydro.

The City is embarking upon Community Improvement Plan policies designed to create financial incentive programs for brownfield development and other physical improvements in designated areas.

The City of Welland will continue to drive the expansion of Highway 406 to a four-lane highway. The City will also continue to work with regional and provincial partners to promote the Niagara GTA Trade corridor as a priority for Welland's future economic development.

10. Plan for the Long Term

The Welland Community Economic Development Strategy represents a long-term commitment. Today's investment in local economic development is designed to achieve long-term socio-economic benefits for its residents. Initiatives resulting from this strategy will be implemented over several years. While the overall community development process is long term, short-term objectives have also been established to mark the City's progress and sustain momentum.

CLUSTER PROFILE

TRANSPORTATION EQUIPMENT AND LINKED INDUSTRIES

Description:

Transportation Equipment and Linked Industries includes a range of suppliers and service providers, manufacturers, value-added producers, and wholesale and retail providers of transportation and related equipment. World-class goods and services generated within this cluster in Welland include metal forging, steel pipe, material handling equipment, precision cutting tools, hydraulics, electric drives and controls, robots and transportation services.

Critical Mass:

As Welland’s strongest cluster of business and industry, the Transportation Equipment and Linked Industries cluster has a critical mass of over 70 companies, employing more than 4,000 people. Table 1 lists the ten largest employers within this cluster.

Table 1: Ten Largest Employers in Welland’s Transportation Equipment and Linked Industries Cluster

Employer	# of Employees
John Deere Welland Works	939
GDx Automotive	850
Stelpipe Ltd	450
Bosch Rexroth Canada Corporation	180
Vesuvius Canada Refractories Inc	175
Canada Forgings Inc.	100
Welland Forge	100
Tallman Transport	92
Whiting Equipment Canada Inc.	65
Panabrasive Inc.	56

Additional Innovative Growth Firms:

Indexable Cutting Tools of Canada, CRS Specialties Inc. Hydac Corporation, Mitech Plastics Corporation, CRS Electronics.

Growth Opportunities:

Customized, niche products for aerospace and defence industries and the automotive industry, especially OE parts for New Domestic (traditional importers who now produce in North America). The North American market is attractive for OEMs, but fiercely competitive. There exist opportunities to broaden the North American market through strategic export expansion, investments, joint ventures, and technology transfers (Derosiers, 2004). The Niagara College technology center represents an excellent resource for labour supply, R&D and prototyping. Transportation, distribution and warehousing services are also targeted for growth.

CLUSTER PROFILE COMMUNICATIONS AND FINANCIAL SERVICES

Description:

Communications and Financial Services represents Welland's fastest growing cluster of businesses. This group of enterprises includes contact centers and financial service providers. It also encompasses information technology and communications businesses which are important enablers for advancing Welland's economic growth. Data centres are targeted for development within this cluster.

Critical Mass:

Welland's Communications and Financial Services cluster has a critical mass of over 50 companies, employing more than 3,400 people. Table 2 lists the ten largest employers within this cluster.

Table 2: Ten Largest Employers in Welland's Communications and Financial Services Cluster

Employer	# of Employees
Canadian Tire Financial Services	1,408
Convergys Customer Management Canada	1,100
NuComm International	400
Marusa Marketing	81
TD Canada Trust	54
Scotia Bank	39
Caisse Populaire	36
Canadian Imperial Bank of Commerce (CIBC)	28
Atlas Credit Union	24
Bank of Montreal	18

Growth Opportunities:

A key target for growth within this cluster includes data centres or data warehouses. The Business Information Technology Network (BITNET) will also be promoted to encourage the development of information technology firms and employment opportunities.

CLUSTER PROFILE SPORTS AND RECREATIONAL TOURISM

Description:

Sports and Recreational Tourism is a relatively new area of economic focus for the City of Welland. The City benefits from tremendous assets supporting this cluster. In particular, the Welland Canal offers significant potential for water sports and recreation such as rowing, sports fishing, dragon boat racing, kayaking, and triathlons. A range of national and international sports have been hosted on Welland's waterways.

Additional community assets include two arenas, a professional quality baseball stadium and indoor and outdoor soccer and tennis facilities. The city has over 18 km of paved pathways along the Welland Canal, which is ideal for cycling and walking.

The Little NHL International Hockey Tournament hosts over 80 teams during the March school break. The Welland Tribune Boys High School Basketball Tournament is the oldest consecutive running major basketball tournament in Ontario.

Soccer tournaments and weekend regattas bring in several thousand visitors each weekend.

The City of Welland hosts major festivals such as the Niagara Food Festival which attracts over 50,000 people. The Welland Rose Festival has been operating for more than 40 years and attracts thousands of visitors. Both festivals have been recognized among the top 50 festivals in Ontario.

Proximity to Niagara Falls as well as a multitude of tourism attractions and amenities across the region contribute to Welland's potential for developing this sector.

Critical Mass:

There are over 30 organizations in Welland involved in sporting and recreational activities with about 200 employees and over 800 volunteers.

Three major hotels and several smaller hotels and bed and breakfast inns as well as an excellent range of dining facilities support Welland's tourism industry.

Opportunities for Growth:

Key targets for growth include sports fishing, bicycle tours, a camp ground/RV park, a golf course, a concert facility, heritage tours and canal festivals. The 2007 Corporate Dragon Boat Championships provide an excellent opportunity for the City to develop infrastructure resources and world-wide recognition.

SECTION TWO: STRATEGIC DEVELOPMENT PROCESS

INTRODUCTION

This section provides a description of the process undertaken to assess strategic options and arrive at a plan for moving Welland forward. The section summarizes the findings obtained from performing a competitive analysis of Welland in 2001 and 2003. These results, along with input from stakeholder consultations, form the basis for identifying clusters capable of contributing to the economic growth prospects of Welland. Additionally, a comprehensive analysis of Welland's labour market was undertaken to identify important trends and current and future challenges that must be addressed by the community. Finally, a study of eleven communities provided a wealth of experience and creative ideas for community economic development.

COMPETITIVE ANALYSIS OF INDUSTRIES IN THE CITY OF WELLAND: SUMMARY OF FINDINGS

In 2001, the Welland Development Commission sponsored a competitive analysis for the City of Welland as part of a process designed to identify and assess relevant sectoral and industrial trends in the community. The competitive analysis provided the framework for informed and strategic decisions regarding the allocation of critical resources aimed at promoting economic development in Welland. The objective of the competitive analysis was to identify opportunities for maximizing Welland's potential for retaining existing business enterprises, expanding established firms, stimulating entrepreneurial activity and attracting new investment opportunities.

Two analytical techniques, location quotient and shift-share analysis, were employed to perform the competitive analysis. Both techniques were applied to sectors/industries in Welland for the time period 1991 to 1996, using census employment data available through Statistics Canada.

The findings derived from the two analytical techniques were supplemented by consultations with community and business leaders for the purpose of identifying opportunities and challenges affecting the performance of Welland's sectors/industries. The competitive analysis identified several industries within the manufacturing and service sectors that were "economic drivers" contributing to local economic performance at that time. The first group of industries exhibited strong employment growth in Welland, displayed a competitive advantage, possessed a specialization and represented growth activities regionally and provincially. Within the manufacturing sector, these competitive industries were:

- Machinery Manufacturing;
- Rubber Products Manufacturing;
- Electrical and Electronic Products Manufacturing.

Within the service sector, these competitive industries were:

- Consumer and Business Financing;
- Non-Store Retail;
- Health and Social Service Industries;
- Shoe, Apparel, Fabric and Yarn – Retail Trade;
- Membership Organizations;
- Other Services.

These industries represented high priorities for marketing and business development activities including investment attraction, business retention and expansion, and new entrepreneurial ventures.

The next set of manufacturing and service sector industries also contributed to Welland's economic performance. This second group of industries exhibited strong employment growth in Welland, displayed a competitive advantage, and represented growth activities regionally and provincially.

Industries within the manufacturing sector were:

- Plastic Products Manufacturing;
- Food Manufacturing;
- Beverage Manufacturing;
- Wood Manufacturing.

Industries within the service sector were:

- Farm Products – Wholesale Trade;
- Food, Beverage, Drug and Tobacco – Wholesale Trade;
- Apparel and Dry Goods – Wholesale Trade;
- Business Service Industries;
- Amusement and Recreational Service Industries.

Strategies in this case called for marketing initiatives aimed at enhancing the level of industrial concentration.

Within the Service sector a third group of industries exhibited strong employment growth, possessed a specialization and displayed a competitive advantage in Welland during the early 1990s, including:

- Food, Beverage and Drug – Retail Trade;
- General Retail Merchandising- Retail Trade;
- Finance and Insurance;
- Local Government.

However, because this group of industries were declining regionally and provincially, marketing initiatives emphasized the need for strategies directed at business retention, specifically designed to enhance their competitive position in the community.

The local economy also benefited from another set of industries which possessed a specialization in Welland. Within the manufacturing sector, industries included Fabricated Metal Products and Transportation Equipment and within the service sector, industries consisted of Machinery Equipment and Supplies – Wholesale Trade, Educational Service Industries, and Food and Beverage Service Industries. While these industries did not display a competitive advantage in the community and lagged the employment growth observed at the regional and provincial levels, they represented potential growth industries and, therefore, opportunities for business retention and expansion. Strategies in this case, called for marketing initiatives directed at improving the competitive position of this group of industries in Welland.

Finally, the performance of Automotive Vehicles, Parts and Accessories Industries, Sales and Service suggested the need for close monitoring. The industry exhibited employment growth in excess of the region and the province and displayed a specialization in Welland; however, it represented a declining industry regionally and provincially and did not display a competitive advantage in the community. Strategies, in this case, also called for initiatives directed at business retention.

The competitive analysis performed in 2001 found Welland to be experiencing a fundamental shift towards technology-enabled manufacturing and service sector enterprises. Furthermore, the analysis found the City to be well positioned to strengthen its existing manufacturing cluster and to build a nucleus

of advanced manufacturing companies including technology supply industries. The analysis further acknowledged that Welland's service sector continued to register strong performance, which positioned the City with the potential to develop and attract advanced technology service companies.

The competitive analysis proposed that to improve its economy, Welland had to extend beyond traditional models of industrial revitalization and embrace bold strategies emphasizing applied advanced technology. The 2001 competitive analysis concluded by emphasizing the need for community and business leaders to unleash their creative energy, build entrepreneurial capacity and, in turn, achieve "Prosperity through Innovation".

A follow up competitive analysis was performed for the City of Welland in 2003. The update presented an overview of Welland's economic performance over the full decade, 1991 to 2001, with a greater focus on the later five-year period of 1996 to 2001. From a macro perspective, in the time period extending between 1991 and 2001, labour force statistics revealed an overall improvement in the performance of Welland's economy. For instance, between 1991 and 2001, the total employed in Welland increased from 21,285 to 22,490, representing a 5.6% increase. Furthermore, the unemployment rate in the community declined from 10% in 1991 to 7.2% in 2001 and the employment-to-population ratio increased from 56 to 57.5 in the same ten-year period.

Approached from a more micro-sectoral perspective, the competitive analysis noted the emergence of several trends based on the examination of 1996 and 2001 labour force data related to a number of sectors in Welland and other communities selected for comparison. The sectors considered included: Mining and Agriculture, Manufacturing, Construction, Finance, Insurance and Real Estate, Wholesale and Retail, and Transportation. The communities selected as a basis for comparison to Welland included Cornwall and North Bay which were approximately the same size as Welland with 2001 populations of 45,620 and 52,785 respectively. Kingston, a larger community with a 2001 population of 114,180 was also used as a basis for comparison with Welland.

Additionally, Welland was compared to a sample of three regional communities, Fort Erie, St. Catharines and Niagara Falls with a 2001 population of 28,125, 129,155 and 78,815 respectively.

The sectoral analysis suggested a trend of declining contribution by the more traditional engines of economic growth, including Mining and Agriculture, Construction, and especially Manufacturing. Conversely, the analysis suggested a trend of growing contribution in Welland by the service sector, particularly Finance, Insurance and Real Estate, and Transportation. Despite the transformation of Welland's economic structure, overall the City compared favourably with other communities in Ontario. These observations were supported by findings obtained from the application of location quotient analysis to industries in Welland for the three time periods 1991, 1996 and 2001.

The 2003 competitive analysis indicated that Welland was not immune to the shift in sectors contributing to economic growth at the local, regional, provincial and national levels. The primary sources of economic growth in Welland along with other communities across Canada shifted from Mining and Agriculture, Construction, and in particular Manufacturing, to increased service activity. Despite the shifts, a number of industries in the manufacturing sector continued to contribute directly to Welland's economic growth prospects, along with an increasing number of industries in the service and retail sectors.

Based on the more recent analysis, Welland's competitive strengths in manufacturing appeared to exist in the following industries:

- Machinery Manufacturing;
- Electrical Equipment Appliance and Component Manufacturing;
- Non-metallic Mineral Product Manufacturing;
- Primary Metal Manufacturing;
- Rubber Product Manufacturing;
- Fabricated Metal Manufacturing.

The analysis recommended that attention be devoted to two important industries in Welland, Rubber Product Manufacturing and Fabricated Metal

Manufacturing, since each displayed a decreasing degree of concentration in the community between 1991 and 2001.

Within the service sector, the following industries appeared to exhibit a competitive strength in Welland:

- Educational Services;
- Health Care and Social Assistance;
- Finance and Insurance;
- Personal Care Services;
- Accommodation and Food Services;
- Other Services;
- Local Municipal and Regional Public Administration;
- Monetary Authorities – Central Bank;
- Credit Intermediation and Related Activities;
- Funds and Other Financial Vehicles;
- Administration and Support Waste Management and Remediation Services;
- Hospitals;
- Nursing and Residential Care Facilities;
- Social Assistance;
- Food Services and Drinking Places;
- Repair Maintenance;
- Religious Grants – Making Civic and Professional and Similar Organizations.

The analysis noted that the two service sector industries, Other Services and Local Municipal and Regional Public Administration each exhibited a decreasing degree of concentration in Welland between 1996 and 2001.

Welland's strengths in retail activity appeared to exist with the following industries:

- General Merchandise Stores;
- Motor Vehicle and Parts Dealers;

- Food and Beverage Stores;
- Home Furnishing Stores;
- Health and Personal Care Stores;
- Gasoline Stations;
- Sporting Goods Hobby Book and Music Stores.

The 2003 competitive analysis update concluded that Welland, like many communities across Ontario and Canada, faced significant challenges in pursuing new business development. The analysis further concluded that the trend towards an increasing contribution by the service sector and a declining contribution by the manufacturing sector to local economic growth is likely to continue. This trend reflects global economic conditions, particularly intensified competition, trade liberalization, and technology advancement.

The analysis proposed that the pursuit of new business development required strategic visioning for building on Welland's strengths. The expansion of existing clusters and pursuit of new opportunities in the manufacturing and service sectors, capable of contributing to the economic growth prospects of Welland, requires a long-term strategic approach. As a first step, the focus needs to be on identifying existing and potential clusters based on sectoral/industrial competitive advantages and other local strengths.

Based on the findings of the competitive analysis performed in 2001 and 2003, and local intelligence obtained through consultations with community and business leaders, the following clusters emerged as areas of focus with potential for sustaining local economic growth:

- Transportation Equipment and Linked Industries;
- Communications and Financial Services;
- Sports and Recreational Tourism.

The prospects for growing and nurturing existing and new clusters demands the commitment and support of the community, beginning with its political and business leaders. Furthermore, it demands focusing on each cluster separately through the formation of cluster-specific networks. Membership within

each cluster network should include representation from the Economic Development and Tourism Department, the Chamber of Commerce, Niagara Economic and Tourism Corporation, the provincial and federal governments and widespread participation by firms operating in the cluster. The objective of the network should be to formulate, implement and monitor at regular intervals, initiatives directed at the retention, expansion, creation and attraction of firms in each cluster. Initiatives or issues that such cluster groups may address include:

- transformation to speciality/value added products directed at niche markets;
- improvement of the competitive position of firms through the integration of new technologies;
- strategic market expansion;
- organizational/ work structuring to improve matching of job and skill requirements in order to fully utilize employees talents;
- involvement of local/regional input and service suppliers;
- attraction and creation of firms capable of complimenting and contributing to the inertia of each cluster.

WELLAND COMMUNITY DEVELOPMENT STRATEGY STAKEHOLDER CONSULTATIONS

With the identification of the three competitive clusters, the community was consulted for validation, and to provide input regarding the prospects for growing and nurturing the clusters in Welland. Three meetings composed of cluster-specific business/industry representation were scheduled to validate and discuss the potential contribution of each cluster to the economic development and growth prospects of Welland. Meetings included representatives from Transportation Equipment and Linked Industries; Communications and Financial Services; and Sports and Recreational Tourism. A fourth group consisting of Labour Market and Education representation was also asked to provide input regarding labour market trends and issues and opportunities for education and training in the community. Participants are listed in Appendix B.

Opportunities for Development and Growth:

- Proximity to an extensive North American market.
- Location west of Toronto with direct access to Canada/US border.
- Access to a regional labour force of approximately 200,000 people.
- High concentration of transportation equipment and support industries.
- High concentration of contact centres and financial services providing the prospects for diversification into data processing and data warehousing services.
- Welland Canal's potential for securing sports and recreation tourism opportunities; the 2007 Dragon Boat Corporate Championships represents a catalyst to spur a range of viable canal-related activities.
- The existence of organizations and facilities capable of contributing to a diversified and competitive sports and recreation tourism sector.
- Competitive business costs relative to other communities across North America.

- Cost of living advantages combined with a favourable quality of life.
- Presence of post secondary educational institutions including Brock University and Niagara College, plus McMaster University and Mohawk College within a 45 minute drive, as well as several post secondary institutions in the Buffalo area.
- A strong entrepreneurial culture.
- Advanced telecommunications infrastructure.
- The potential to capture the outgrowth from Toronto.

Challenges for Development and Growth:

- Significant decline and volatility within the manufacturing sector, and in particular, the steel industry.
- Continuing competitive global pressures including technological advancements, trade liberalization, industrializing nations, and demographic shifts.
- Lack of transportation infrastructure (Highway 406 – four- lane extension and the need for Niagara GTA Trade Corridor).
- Downtown revitalization.
- Relatively high taxes and provincial taxation policy.
- Inadequate intra-regional transportation services.
- Intensified domestic competition along 401 automotive corridor.
- Insufficient capital investment and reinvestment.
- Insufficient research and development.
- Current and projected trades skills shortages.
- Retention of skilled immigrants.
- Youth retention.
- Fluctuating exchange rate.
- Lack of regional focus on manufacturing.
- Need to get on the radar screen of national and international site selectors.

SITE SELECTION CONSULTATIONS

The City of Welland in partnership with the Niagara Economic and Tourism Corporation undertook exploratory investment missions to New York City, Pittsburgh, Chicago and Buffalo to build awareness of Welland as an attractive location for new business investment and to build relationships with site selectors, trade commissioners and investment officers. At the same time, an important objective of these meetings with site selection professionals was to identify current trends regarding investment inquiries. A critical element in building a community economic development strategy is to know what is important to potential investors.

Priority growth industries identified during meetings with private site selection firms include contact centres, data centres and distribution centres. According to the site selectors, investment inquiries regarding manufacturing have been slow in recent years in the United States but are starting to pick up. These priorities fit well with Welland's growth targets and existing competitive strengths. Data centres and distribution centres, as well as manufacturing have been incorporated into the Welland Community Economic Development Strategy.

Meetings were also held with investment representatives of the Canadian and Ontario governments. The priority focus for both the federal and provincial governments tends to be in the Biotechnology and Information Communications Technology areas. At a provincial level, the Automotive sector is considered to be an important area of focus, which is addressed within Welland's Transportation and Linked Industries Cluster growth target. Welland has not included Biotechnology among target industries given that the City does not possess a competitive advantage or critical mass to build upon in this industry at this time. Information Communications Technology is incorporated within the Communications and Financial Services Cluster.

Factors identified by the site selectors as critical location selection criteria include market access, availability of skilled labour market, availability of serviced land and buildings, a cost competitive business environment, infrastructure

support and a positive political climate that is supportive of business development.

WELLAND LABOUR MARKET STRATEGY

Labour force development is an imperative for successful cluster development. Continuous economic transformation leads to the emergence of new work processes and occupations that require flexibility and ongoing skills development.

Economic Transformation

Since the city's incorporation in 1856, Welland has relied on traditional manufacturing such as lumber, flour, textiles, steel, and forging operations as important drivers of industrial development. The Welland Canal served as an important source of transportation linking Welland, through the St. Lawrence Seaway, to world markets.

In recent decades, Welland has suffered significant losses in manufacturing, with substantial decline in its steel industry and loss of textile mills. The city continues to have a concentration of manufacturing enterprises and has benefited from recent expansions of advanced technology companies such as John Deere, Indexable Cutting Tools and Bosch Rexroth Canada Inc..

As with Hamilton, Welland is caught in a steel paradox. Its steel industry is vital to the city's economic well-being. The city must continue to work with the industry to develop strategies that will help secure its contribution to the local economy. But, the city faces tremendous challenges with both of its leading steel companies, Stelpipe, a division of Stelco, and Atlas Specialty Steels, each confronting an uncertain future. Furthermore, many businesses in the city and across the Niagara Region operate in the steel industry as suppliers or end producers. A number of local transportation companies, automotive parts manufacturers, and machinery manufacturers are impacted by the steel industry's survival. An aging workforce with established families, homes and friendships rely upon steel to maintain their quality of life.

With a labour force of 24,125 in 2001, manufacturing comprised 21.3 percent of the total labour force. However, the sector declined by 6055 jobs

between 1991 and 2001. Since 2001, the downward trend has continued with closures of Welland Pipe, General Drop Forge, and Atlas Specialty Steels impacting the steel industry by over 1,000 direct jobs. Atlas Specialty Steels has been purchased and is in the process of negotiating a start up contract with the United Steelworkers and the Canadian Auto Workers unions. Manufacturing companies recently locating to the city, such as Hydraserv Limited and CRS Electronics, tend to be small businesses, but they offer relatively high wage jobs. Welland continues to remain competitive in several manufacturing industries, including machinery manufacturing, electrical equipment appliance and component manufacturing, primary metal manufacturing, rubber product manufacturing, fabricated metal product manufacturing and non-metallic mineral product manufacturing.

In 2001, Welland's Mining and Agriculture sector accounted for approximately 1%, Manufacturing approximately 21%, Construction approximately 5% and Service approximately 73% of the labour force. Between 1996 and 2001, Mining and Agriculture's share of the labour force remained at approximately 1%, Manufacturing's share declined by approximately 3%, Construction's share remained about the same at 5% while Service's share increased by approximately 3%.

In comparison, in 2001, Niagara Region's Mining and Agriculture sector accounted for approximately 4%, Manufacturing approximately 17%, Construction approximately 6% and Service approximately 73% of the labour force. Between 1996 and 2001, Mining and Agriculture's share of the labour force remained at approximately 4%, Manufacturing's share declined by approximately 3%, Construction's share remained the same at about 6% while Service's share increased by approximately 3%.

These statistics point to the growth of service and retail activity in Welland over the past decade. Retail trade is now the second leading industry in Welland with 13.3 percent of the total labour force. Competitive strengths in retail industries range from motor vehicles and parts dealers to food and beverage

stores. Service industries such as educational services, health care and social assistance and accommodation and food services also continue to perform competitively. Contact centers and financial service industries also contribute to Welland's service sector growth, including the expansion of Canadian Tire Financial Services Inc. and the attraction of Convergys Customer Management Canada. Convergys created over 1,000 new jobs in the city with an annual payroll of \$24 million dollars (Carvalho, 2003, p. 11).

Agriculture is less concentrated in Welland relative to the Niagara Region. Similarly, the city has a small tourism industry. Generally, the city is less diversified than the region as a whole. Its dependency on a limited number of core industries presents challenges for the city's community economic development efforts.

Table 3 illustrates the distribution of the city's labour force across industries. The shift towards a more predominant service sector base is clearly illustrated in Figure 1. The proportion of jobs in the services sector is greater and growing, while manufacturing is contracting.

Table 4 provides a comparison of Welland's economic shift relative to communities of similar size in Ontario. The table reveals a declining contribution by traditional engines of economic growth, including mining and agriculture, construction, and especially manufacturing for all of these communities, and a growing contribution by the service sector (Carvalho, 2003, p. 3). The shift in Welland's economic base is further evident in the trends exhibited within occupations.

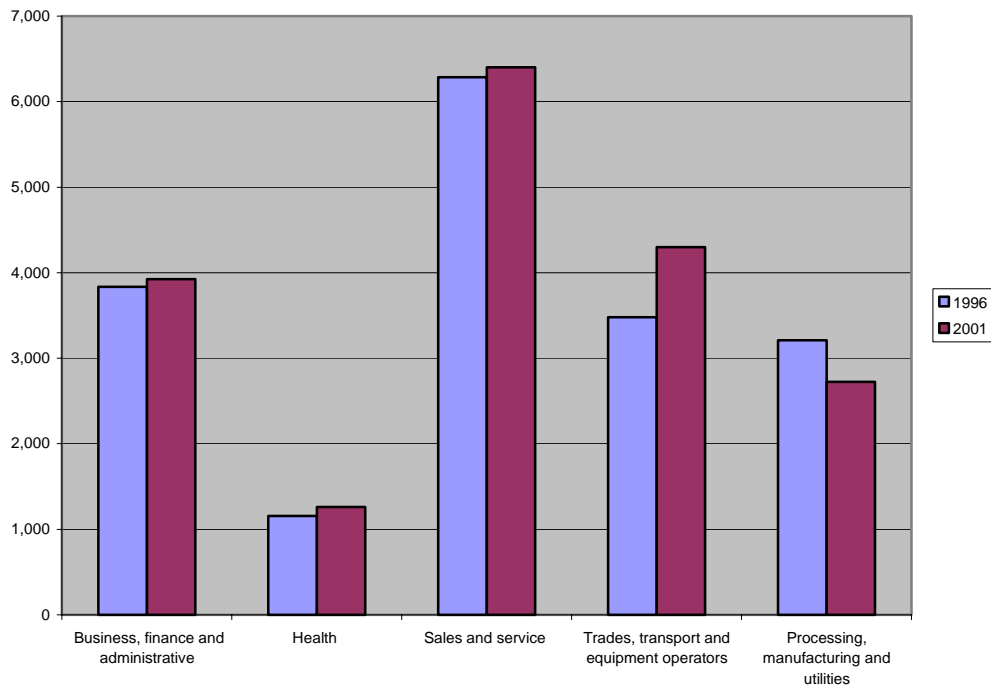
Table 3: Percentage of Labour Force by Industry Welland 2001

Industry Division*	2001	% of Total
*Total Labour Force	24,125	100.0
No Paid Work	460	1.9
Agricultural And Related Service (Fishing, Forestry, Hunting)	220	0.9
Mining & Gas Extraction	85	0.4
Manufacturing	5,140	21.3
Construction	1,300	5.4
Transportation & Warehousing	895	3.7
Informational & Cultural Industries	325	1.3
Utilities	125	0.5
Wholesale Trade	795	3.3
Retail Trade	3,220	13.3
Finance & Insurance	1,095	4.5
Real Estate, Rental & Leasing	195	0.8
Professional, Scientific, Technical Services	660	2.7
Management Of Companies & Enterprises	15	0.1
Administrative Support, Waste Mgmt & Remediation Services	1,435	6.0
Public Administration	815	3.4
Educational Services	1,440	6.0
Health Care & Social Assistance	2,520	10.5
Arts, Entertainment & Recreation	670	2.8
Accommodation And Food Services	1,605	6.7
Other Service (Except Public Administration)	1,105	4.7

Source: Statistics Canada Census 2001

Note: 2001 Census Industry data is based on the North American Industry Classification System (NAICS) and **cannot** be compared to the 1996 or 1991 Census Industry data as that data was based on the Standard Industrial Classification (SIC). NAICS is an industry classification system developed by the statistical agencies of Canada, Mexico and the United States. Created against the background of the North American Free Trade Agreement, it is designed to provide common definitions of the industrial structure of the three countries and a common statistical framework to facilitate the analysis of the three economies. NAICS is based on supply side or production oriented principles, to ensure that industrial data, classified to NAICS, is suitable for the analysis of production related issues such as industrial performance. (Source: Stats Can)

Figure 1: Welland Labour Force by Selected Occupations 1996 and 2001



Source: Human Resources and Skills Development Canada

Table 4: Sectoral Percentage Share of Labour Force (1996 and 2001)

Community	Sector							
	Mining and Agriculture		Manufacturing		Construction		Service	
	1996	2001	1996	2001	1996	2001	1996	2001
Cornwall	1	1	32	24	9	5	58	70
Fort Erie	3	1	29	20	9	4	58	75
Kingston	3	1	11	6	9	5	77	88
Niagara Falls	1	1	27	13	10	6	62	80
North Bay	2	1	10	7	10	5	78	87
St. Catharines	3	2	29	17	10	5	58	76
Welland	3	1	36	21	8	5	53	73

Source: City of Welland: Competitive Analysis Update 2003

Labour Force and Demographic Profile

The City of Welland has a population of just under 50,000 people. The community has a high degree of ethnic diversity. Significant ethnic communities from Italy, Britain, Germany, Holland and the Ukraine exist within the city. Welland's French Canadian population represents over 13 percent of the total (Welland Profile, 2004, p. 3).

Welland continues to boast the highest population of Francophones in the Niagara area. According to the Statistics Canada Census, in 2001, 8,655 people or 18.1% were French speaking.

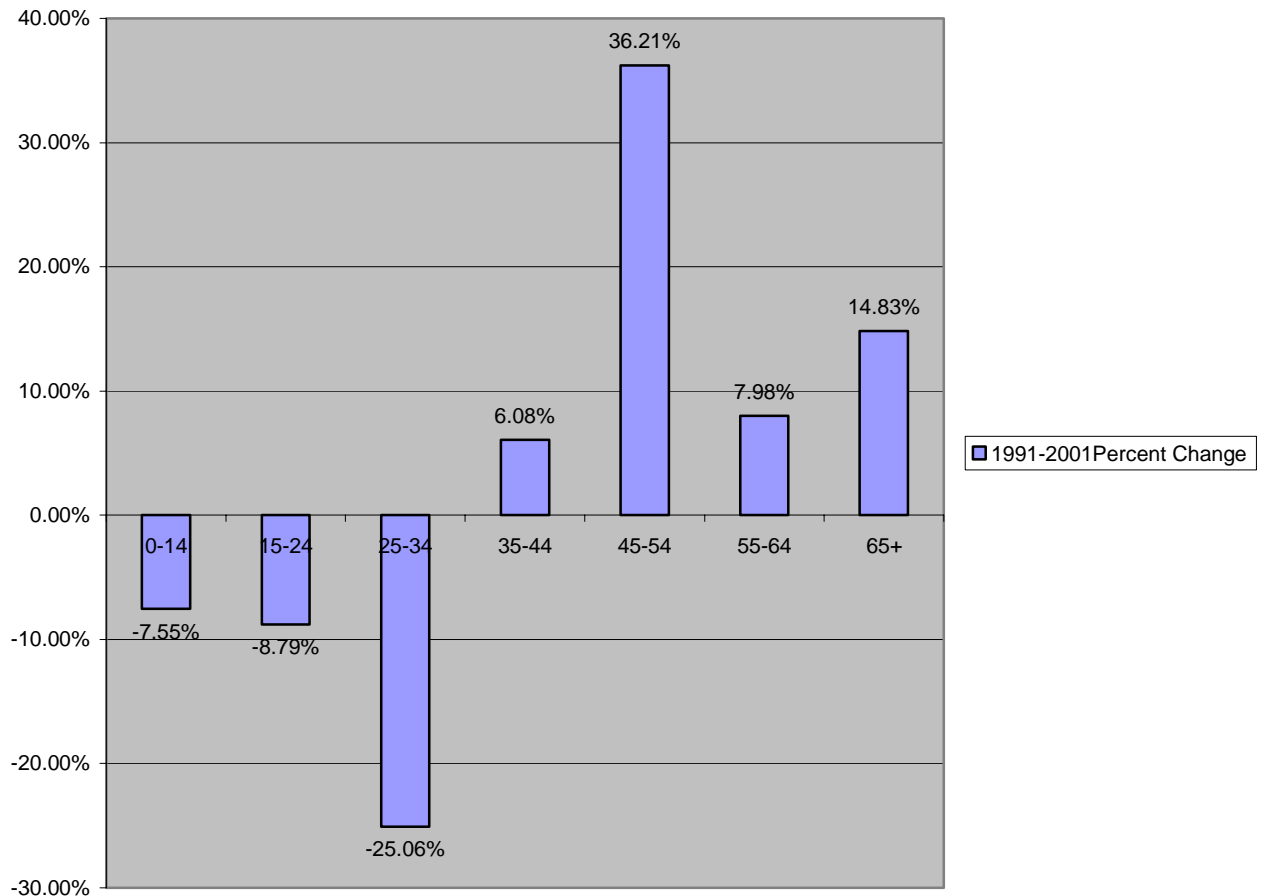
Table 5: Knowledge of Official Languages - Welland

Language	2001	1996
English only	38,830	38,735
French only	280	425
English and French	8,375	8,240
Neither English nor French	220	330

Source: Statistics Canada Census, 2001 vs. 1996

Welland has experienced relatively flat population growth. In 1991, the population of Welland was 47,914 and increased slightly to 48,400 in 2001. As noted in Figure 2, population growth in Welland between 1991 and 2001 was limited to age cohorts 35 to 44 and above, with the greatest increase displayed by the 45 to 54 age cohort. In contrast, younger age cohorts demonstrated a decline in population between 1991 and 2001, with the 25 to 34 age cohort experiencing the greatest decline. This decline in the City's younger population can impose serious constraints on the community's future labour market growth and, therefore, its economic development prospects.

Figure 2: 1991-2001 Percent Change in Welland Population



Source: Statistics Canada

In 2001, the city's median income was \$21,505, up from \$17,070 in 1996. Welland's participation and employment rates reached 61.6% and 57.5% respectively in 2001; however, these rates remained below regional levels.

Table 6: Welland Population by Income

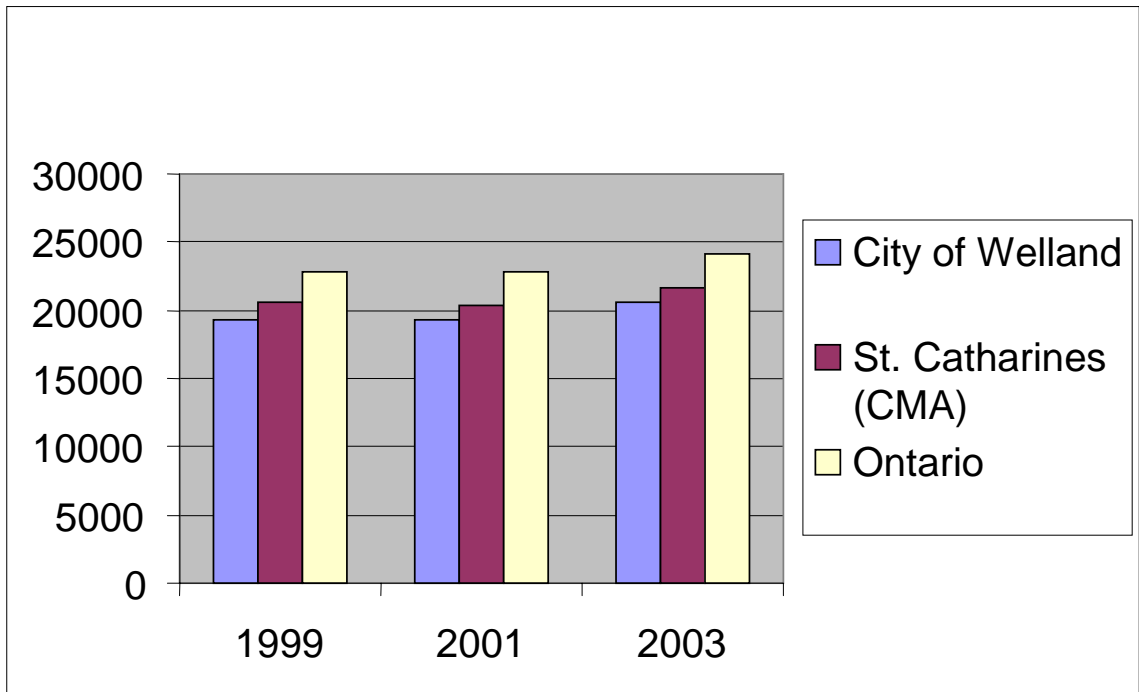
Individuals 15 years and Over with Income

Income	2001	1996	1991
Under \$1,000	1,545	1,870	1,350
\$ 1,000 - \$ 2,999	1,805	1,700	2,010
\$ 3,000 - \$ 4,999	1,520	1,525	1,775
\$ 5,000 - \$ 6,999	1,480	1,920	1,920
\$ 7,000 - \$ 9,999	2,310	2,805	2,690
\$10,000 - \$14,999	4,665	5,615	5,630
\$15,000 - \$19,999	4,025	3,935	3,660
\$20,000 - \$24,999	3,205	2,975	3,050
\$25,000 - \$29,999	2,770	2,600	2,745
\$30,000 - \$39,999	5,410	4,335	4,505
\$40,000 - \$49,000	3,350	2,570	3,015
\$50,000 and over	5,300	4,075	2,420
Average Income \$	26,854	23,599	
Median Income \$	21,505	17,970	

Source: Statistics Canada Census 2001, 1996 and 1991

According to Figure 3, Welland's per capita income remained relatively stable between 1999 and 2001 and increased between 2001 and 2003. However, in each of the three time periods, per capita income in Welland lagged that of the region and the province.

**Figure 3: Per Capita Income
Welland, St. Catharines CMA and Ontario**



Source: Financial Post Market Reports

The city's labour pool is drawn from across the Niagara Region, with approximately 35 percent of the labour force commuting in and out of the city. Between 1996 and 2001 commuting patterns have remained fairly consistent, with the exception of a 4% increase in the number of commuters leaving Welland to work in Niagara Falls. In the same time period, there was a 3% decrease in the number of commuters leaving Niagara Falls to work in Welland.

Figure 4: Commuters Leaving Welland 2001

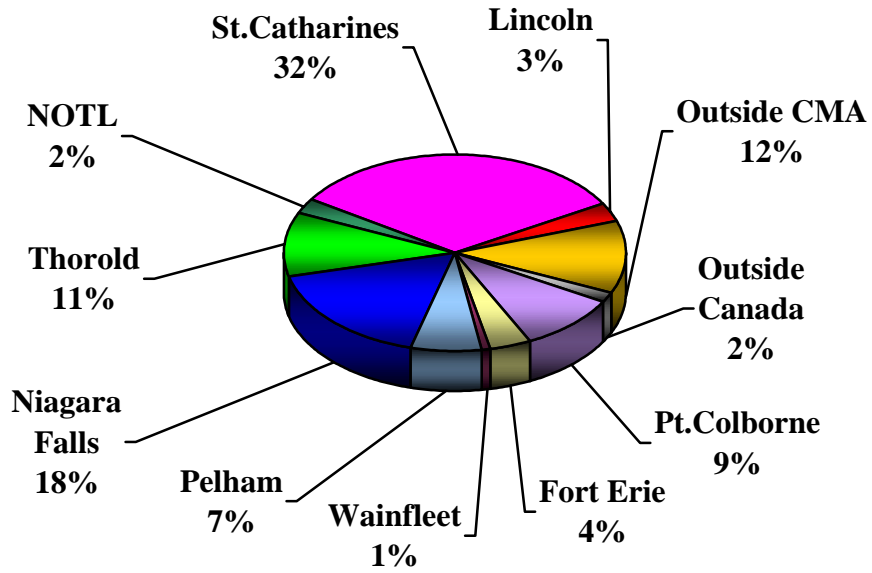
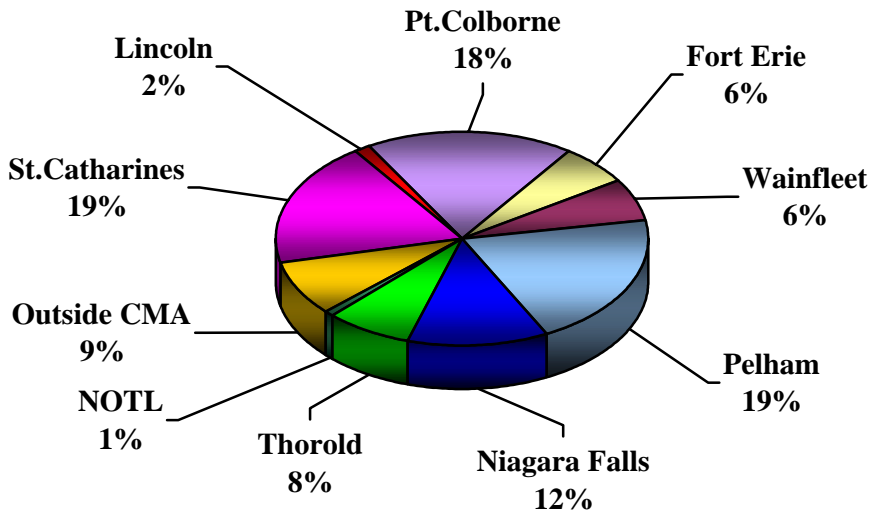


Figure 5: Commuters into Welland 2001



The participation rate¹ in Welland increased by 1%, from 60.6% to 61.6% between 1996 and 2001. The employment rate² increased by 3.3 %. In comparison, during the same time period, the participation rate and employment rate in the Niagara Region increased by 1.3% and 3.6% respectively between 1996 and 2001.

Table 7: Welland Labour Force Activity 2001 and 1996

Characteristics	2001	1996
Total population 15yrs +	39,135	38,575
In the Labour Force	24,125	23,365
Employed	22,490	20,920
Unemployed	1,635	2,445
Not in the Labour Force	15,010	15,210
Unemployment Rate %	6.8	10.5
Participation Rate %	61.6	60.6
Employment Rate %	57.5	54.2

Source: Statistics Canada Census

Note: For 1991, the Employment Rate was calculated by HRSDC as Employed/Total Pop 15+. Both the Employed and Total Pop 15+ estimates have been randomly rounded.

¹ Participation Rate represents the total labour force (employed plus unemployed) expressed as a percentage of the population aged 15 years and over.

² Employment Rate represents the number of employed persons expressed as a percentage of the population 15 years of age and over.

Moving Welland Forward: Prosperity through Learning

The closure of Atlas Specialty Steels, Welland Pipe, and Shaw Pipe brought to the forefront the serious economic condition of this community and, specifically, its steel industry. Brownfield sites are scattered throughout the city - symbols of the community's heavy manufacturing history and the heavy burden of its decline.

Several issues relating to Welland's overall socio-economic performance have emerged as a result of the community's economic transformation. Many of the workers displaced through restructuring and plant closures have low formal educational attainment. Many have worked extensively with advanced technologies and possess high levels of skills, but their experiential skills and knowledge are not formally recognized. Many of the displaced workers are ill-prepared to move into the service sector, where jobs are available, nor do they want to. They are faced with tough choices ranging from accepting lower paid service work, retraining, commuting to other areas of growth, or moving away from their community, their families and their friends.

Table 8 indicates that the percentage of people in Welland with a high school graduation certificate was close to the provincial average in 2001. The proportion of the population with a college diploma compared favourably with the province. However, Welland's population possessing a university degree is less than half of the provincial average. This does not bode well for Welland's efforts to attract knowledge-intensive industries requiring university level education.

Table 8: Level of Education: Welland, 2001

Education	Welland		Ontario	
	2001	% of Total	2001	% of Total
Population 20+ highest level of schooling	36,110	100.0	8,282,160	100.0
Less than grade 9	4,740	13.1	733,360	8.7
Grade 9 to 13	13,615	37.7	2,577,275	31.1
Without High School graduation certificate	7,590	55.7	1,402,505	54.4
With High School graduation certificate	6,020	44.2	1,174,770	45.6
Trades Certificate or diploma	4,465	12.4	843,480	10.2
College	8,725	24.1	1,961,265	23.7
Without certificate or diploma	2,875	32.9	545,775	27.8
With certificate or diploma	5,855	67.1	1,415,490	72.2
University	4,565	12.6	2,176,780	26.3
Without degree	1,525	33.4	590,415	27.1
Without certificate or diploma	1,185	77.4	403,395	68.3
With certificate or diploma	345	22.6	187,020	31.7
With bachelor's degree or higher	3,040	66.6	1,586,365	72.9

Source: Statistics Canada Census 2001

Table 9: Welland Postsecondary Qualifications by Major Field of Study

Field of Study	2001		1996	
	Male	Female	Male	Female
Total	6670	7060	6340	6130
Educational, recreational and counselling services	480	1070	435	1010
Fine and applied arts	250	495	135	485
Humanities and related fields	335	365	345	365
Social sciences and related fields	520	845	485	565
Commerce, management and business administration	875	1810	815	1515
Agricultural and biological sciences/technologies	260	255	235	130
Engineering and applied sciences	270	35	195	25
Engineering and applied science technologies and trades	3255	400	3220	290
Health professions, sciences and technologies	225	1715	240	1610
Mathematics and physical sciences	190	55	200	95
No specialization and all other, n.e.c.	15	20	25	30

Source: Statistics Canada Census (20% sample data)

The Welland community is served by two post-secondary institutions in the Niagara Region, Brock University and Niagara College. Additionally, McMaster University Buffalo University, Niagara University and Erie County Community College among others are within commuting distance. The District School Board of Niagara and the Niagara Catholic District School Board operate a total of sixteen English elementary schools and six French schools, three English secondary schools and one French secondary school.

Learning opportunities supporting advanced manufacturing are limited but expanding. Niagara College offers several technology options such as mechanical engineering technology. The college has created a Centre for Integrated Manufacturing, Training and Applied Research and a Centre for Advanced Visualization both of which work with local manufacturers. Engineering graduates must be recruited from outside the local area. Partnerships with universities such as McMaster which offer Mechanical Engineering programs need to be explored.

Health Care and Social Services is emerging as a leading sector in Welland. Increasingly workers in professional occupations in health are in the 45 years and older cohorts. Welland has a serious shortage of doctors. Community leaders in Welland have championed the development of the Association of International Physicians and Surgeons of Ontario, with the first chapter created in Niagara.

Community Consultations with Labour Market Partners

Representative from community organizations and educational institutions gathered to discuss issues and opportunities relating to labour market development.

Community Consultations with Labour Market Development Stakeholders

Opportunities	Challenges
<ul style="list-style-type: none"> • Integration of technology training, research and development resources at Niagara College Welland campus. • Contribute to the development of stronger linkages between post secondary schools, Niagara College, Brock University and employers. • Partnerships should also be developed with Mohawk College and McMaster University, particularly to address needs for engineering professions and skilled trades. • Commitment of community partners to work collaboratively. • Strong infrastructure of community agencies supporting labour adjustment and employment. • Government commitment (Ministry of Training, Colleges and Universities) towards removing barriers for newcomers. • Mayor's youth task force as a forum for addressing youth-related employment issues. • Expansion of Business Information Technology Network (BITNET). 	<ul style="list-style-type: none"> • Disconnect between perceptions of labour force shortage and actual shortages. Specific shortages exist in trades, e.g. Electrical trades, brick layers, carpenters. Labour market shortages emerging for some businesses such as contact centres. • Aging work force, especially among trades will impact future labour force. • Lack of HR planning, especially among small businesses. • Insufficient numbers of employers committing to job placements, co-ops, apprenticeships. Employers want 3rd, 4th, 5th level apprentices as opposed to lower levels. • Concern over apprentices leaving after companies have made significant investment in training them. • Lack of high paying, professional service sector employment opportunities. • Inadequate transportation, especially intra-regionally • Excessive seasonal, part-time work. • Need to better integrate and co-ordinate just-in-time community services on the ground. • Need resources to gather labour market information (centralized).

Labour Force Development Plan

A talented and job-ready workforce is essential for building a strong local economy. Welland's labour force development plan should be directed at enhancing the City's capacity to embrace workforce opportunities and to address challenges impeding productive and meaningful careers that provide liveable incomes for its residents. The plan should link employers with a skilled labour market. It should assist job-seekers to find meaningful employment that utilizes their talents, knowledge and skills. The plan should address the needs of both the unemployed and underemployed labour force, including displaced workers, youth, immigrants, visible minorities, and disabled.

The following strategies have been identified as primary objectives to be achieved through community partnership:

1. Establish an integrated, cross-sectoral, multi-jurisdictional network of people and organizations interested in embracing work force development and employment issues. Partners such as the Niagara Training and Adjustment Board, the Employment Help Centre and the Business Education Council of Niagara should play a leadership role in organizing this collaboration of programs and services.

Many organizations and all levels of government should be involved in this network, including public and private sector education and training institutions, community and private sector employment agencies, labour organizations, business and industry associations, and job seekers. The network is not intended to replace any existing organization: partners would continue to operate according to their own mandates.

For each primary interest group, including job seekers, businesses and community agencies, and educational and counselling services, centralized information services (including on-line resources) should be developed to support employment needs. Given the regional scope of Welland's labour market, and similar needs across Niagara, a regional agency should champion this initiative on a region-wide basis, with access at a local community level.

2. Engage business and industry leaders to raise awareness of current and emerging job opportunities in the City of Welland. Utilize cluster networks to generate information regarding emerging industries, occupations and skills requirements.

Document the business and employment outlook for each of the three target clusters identified as strategic development priorities, beginning with major employers. Create a database for recording the information obtained through surveys and/or interviews and use the data to identify labour market trends and issues.

Once this process is established, it should be incorporated into the City's Business Retention and Expansion program to ensure its sustainability.

Communities and agencies across Niagara should collaborate to gather the results for individual communities as part of a regional, integrated Labour Market Information System.

3. Bridge the education-jobs gap. Promote partnerships among education and training providers and employers to encourage flexible programs for skills development that match the needs of local employers and job-seekers and enable fuller employment opportunities.

Develop community-based access to on-line resources that profile Welland companies and their job vacancies.

Expand opportunities for trades training including partnerships among multiple training institutions, including colleges, high schools, and technical institutes.

4. Encourage employers and employment agencies to develop skills inventories for workers and job seekers.
5. Identify resources for and ensure adequacy of career counselling for unemployed and underemployed people in new economy workplaces, including support for adults in career transition.
6. Identify resources for prior learning assessment and recognition. Many workers have acquired skills informally through workplace training, but lack formal credentials. Further, an enormous waste of talent exists among immigrants in communities across Canada. The government of Canada projects that by 2009, immigrants will account for 100% of the net new growth in the labour force.

Expand initiatives aimed at English language training, skills development and work experience for newcomers.

7. Explore opportunities for employer-based skills development partnerships aimed at work force development.
8. Provide information and advocate the provision of employment supports for workers, including transportation, day care services, and flexible work schedules.
9. Actively market local career opportunities for youth. Promote school-to-work transition programs and apprenticeship programs especially among businesses within key clusters of development.
10. Promote Welland's bilingual work force. These talents are an important asset for the community and should be supported and encouraged.
11. Build awareness of the need for succession planning for human resources. Utilize cluster networks and cross-sectoral community forums to inform companies regarding labour market trends and issues.
12. Integrate investment marketing initiatives with talent attraction initiatives.
13. Research programs and funding opportunities at all levels of government and promote private-sector support for local labour force development projects that focus on advancing Welland's clusters of development.

The strategies above lay out a framework for building Welland's talent base, a responsibility that is shared among a wide range of stakeholders. The City of Welland recognizes the regional composition of its labour force and encourages a region-wide network supporting work force development. Developing a network of relationships, tools and resources, requires collaboration, commitment and time. The strategies require a core team of champions to take a leadership role in managing the ongoing process. The City of Welland will continue to bring together community stakeholders to implement solutions for effective work force development, and will work with its partners to ensure that individuals are prepared for and benefit from ongoing economic transformation.

The Canadian Manufacturers and Exporters' Management Issues Survey 2001-2003 reports that 28 percent of respondents identified the lack of qualified personnel as a constraining factor affecting performance improvement. With reference to deteriorating business conditions, 29 percent expected further deterioration in the availability of skilled personnel. Available skilled labour was cited by 74.6 percent of the respondents as a factor for investment location, the third most common response after corporate taxes and transportation costs. (CME 2001). Furthermore, by the year 2001, it is estimated that 100 percent of Canada's net labour force growth will depend on immigration. Attracting and integrating skilled immigrants into the labour market has taken on a new urgency (Maytree Foundation, April 2002). A labour market network that improves labour market entry for displaced workers, immigrants, youth and other unemployed and underemployed people within the community is a top priority for Welland and the Niagara Region. An integrated system is needed, that supports practical solutions while respecting jurisdictional responsibilities of community stakeholders. Collaboration and leadership in labour market development are essential for moving Welland forward.

COMMUNITY MODELS STUDY

INTRODUCTION

As the City of Welland worked at developing a Community Development Strategy, 'best practice' models from other communities provided a wealth of experience, information and creative ideas for moving forward more expediently by learning from them, avoiding their mistakes and employing strategies that apply directly to Welland. Many communities from Canada, the United States and Europe were researched initially, then eleven were selected for the study. While not included in this summary, a profile for each community is provided in a full report, outlining the key issues, strategies and outcomes of each community. The full report is available on the City of Welland web site,

Although the communities may differ in size or resources, each 'best practice' model has similar basic issues and challenges related to those Welland faces today. Many communities started their strategic planning process over a decade ago, and are therefore, at a more advanced stage of community development. Implementation of community economic development strategies generally involves a long term commitment. The community models considered in this research confirm that Welland has already initiated several of the key strategies identified for successful community development.

The selection of the eleven communities drawn as case studies is based primarily on the composition of their economic structure. They are all historically similar to Welland, and in most cases currently or previously have experienced a significant dependency on the steel industry. Following the decline of that industry, they have faced challenges of economic restructuring similar to those occurring in Welland today. Most of the communities have been left with the same legacy of brownfield sites, decreased manufacturing employment and an aging workforce. Industry downsizing due to global competition, trade liberalization and changing technology have prompted the development of a strategic plan for economic transformation and community revitalization.

Descriptions of the key strategies that emerged from the community models follow. This report reviews the economic development strategies created in these communities, describes how the strategies evolved and were implemented, and examines their successes and failures. The report also looks at the roles of key community stakeholders.

Primary research for the Community Models Study involved visits to four of the communities; Pittsburgh, Sheffield, Hamilton and Cobourg. Representatives from economic development and labour market development organizations were interviewed. Their input was invaluable, complementing secondary research activities. A list of individuals consulted, as well as sources of information and reports used in the research are included in the references section.

STRATEGIES

1. Diversification

Traditionally Welland's economy has been significantly based on heavy industrial manufacturing, and despite losses in recent years, this sector remains a critical sector in the City today. Manufacturing has historically been the city's largest employment sector with a total of 5,145 jobs (2001). Although major expansions have taken place within companies such as John Deere, Welland Works and Bosch Rexroth in recent years, overall the sector has declined by more than 30% since 1996. In addition, further significant losses of 1,000 jobs have been experienced since 2001. To some extent, manufacturing job losses have been offset by gains in the service sector in transportation, contact centres and retail.

Welland's manufacturing sector, particularly the steel industry has declined substantially during the past decade. This decline parallels a global trend, as can be seen in many of the communities researched for this project, for example, Sheffield, Pittsburgh, Corby and Gary. For the most part, this decline is not reversible.

While Welland needs to maintain manufacturing jobs to sustain its income generation and economic growth, it can no longer rely on traditional manufacturing industries for new employment growth. The industrial base must be diversified into other sectors in order for Welland to achieve economic stability and business confidence in the future. Generally, successful diversification is accomplished by building on existing strengths and competitive advantages.

Advanced Manufacturing

As technology becomes more advanced and integrated into manufacturing, there is a move towards knowledge-based industries and leaner manufacturing. Sheffield, for example, produces as much steel today as it did at the height of its production, but with a rationalized industry that has been reduced by 50,000 jobs. The steel industry today is focused on specialty products for niche markets where it can be competitive.

Pittsburgh embraced strategic economic diversification several decades ago, in the 1940s, when its dependency on the steel industry made it unattractive to new business and population growth. In the 1980s, with the collapse of the steel industry as its major employer, Pittsburgh focused on new technology and service sectors. However, these new industries failed to replace manufacturing as Pittsburgh's engine of growth and prosperity, and the importance of retaining a manufacturing base became apparent. Today the city has over 150,000 workers employed in advanced manufacturing industries. Referred to as the 'computerized factory floor', this emerging field integrates age-old manufacturing with computerization, robotics and automation.

Pittsburgh's educational institutions served as an important catalyst for diversification into advanced manufacturing. Universities and colleges in the city provide the education and training necessary to produce highly-skilled workers and research capabilities that spawn spin off companies. This support creates the environment necessary to attract investment into the area and helps to ensure that existing businesses remain competitive.

In Hamilton, the successful industrial manufacturing that remains an integral part of the city's economy has become specialized, highly automated, and capital intensive. Despite closures and downsizing, the steel and other metal industries remain the largest employer in the city. Hamilton's strategy aims to facilitate the transition of its industrial manufacturing to high value-added activities.

Distribution

Welland's location within the Niagara Region, close to the U.S. border and with access to the QEW and the proposed Mid Peninsula Corridor, as well as the Niagara Central Airport, the Welland Canal and rail links, positions it ideally as a centre for distribution. Welland would benefit from the increased accessibility resulting from the building of the proposed Mid Peninsula corridor and the extension of Highway 406. In the community model studies both Greater Moncton and the Lehigh Valley identified similar opportunities. Greater Moncton built on its location within easy reach of both U.S. and Canadian markets and developed as a distribution and retail centre. It is at the centre of a good transportation system. Lehigh Valley also has excellent transportation conditions with well developed waterways, railways and air transport. It has diversified into food product transportation which also has contributed to the growth of food production, packaging and plastics industries.

The City of Brantford claims the creation of 2,000 jobs as a direct result of Highway 403 being built with an adjoining industrial park attracting new investment. The city also identified food production as a growth industry and has been successful in attracting companies in this industry. In recent years, for example, Maidstone Bakeries invested \$155 million and Western Waffles invested \$25 million.

Sports and Cultural Tourism

Communities with a natural environmental asset have recognised tourism, including both cultural and sports tourism, as potential growth areas. Tourism

not only contributes to the economy as an industry itself, but improves the quality of life for residents and the quality of place for both residents and potential investors. Welland not only has excellent sports facilities and a strong community interest and involvement in sports, but also has the unique feature of the recreational Welland Canal flowing through the centre of the city.

Over the years since the commercial canal was diverted and the Council assumed the canal lands from the federal government, many plans have been put forward for its development. None of them have been successfully implemented although there has been development on Merritt Island, the rowing course, and the introduction of Dragon Boat racing. It may be, as other communities have discovered, that it is too ambitious to implement a large scale plan and the way forward is to identify manageable projects such as the proposed amphitheatre.

The most notable community examples of diversification into sports tourism have been Sheffield and Indianapolis. Indianapolis has focused extensively on sports and hospitality for redevelopment and economic expansion. For three decades and through the administrations of two mayors, the city has developed and implemented an aggressive program focused on amateur sporting events and organisations, plus professional sports teams. To-date, Indianapolis has hosted more than 400 national and international amateur sporting events, attracted numerous sports organizations to locate in the city and built or renovated \$400 million of facilities. Many of the sporting events also have developed an opportunity for cultural tourism which has become a secondary focus for the city.

Sheffield's regeneration strategy was founded on diversification into sports tourism. Sheffield's signature event, hosting the World Student Games in 1991, became the catalyst to stimulate economic development. Brownfield sites left by the steel industry have been redeveloped into sports arenas and stadiums. This strategy was very successful, generating new jobs and prosperity for the city. Originally, the strategy was to develop sports infrastructure; however, in time a

sports manufacturing industry emerged. Examples of these manufacturing industries include a traditional wire company that makes basketball hoops for the National Basketball Association and a forge shop that invested in new technology and makes ice hockey skate blades for the National Hockey League.

Welland has been invited to host the Corporate Dragon Boat races in 2007. As in Sheffield, this event could be a catalyst for investment in the necessary infrastructure, leaving the city well placed to attract future events and develop sports opportunities.

Both Sault Ste. Marie and Cobourg have built on their natural assets to develop a tourism industry. Ten years from the start of its strategic planning process, Cobourg has become a thriving town with an attractive downtown and a growing population. It has become known as a tourist destination. The municipal council invested in a marina, parks, beach and a trailer park. Cobourg retains its manufacturing base, but has also been successful in attracting new industry.

Sault Ste. Marie relied on Algoma steel as its principal employer for more than 100 years. The company began downsizing in the 1990s reducing a workforce of 12,000 down to 4,000 people, with the further loss of employment in related businesses. As a result, the community's economy declined and the town recognized the need for an economic development strategy. The resulting strategy recognized tourism as an important stimulus for prosperity. Sault Ste. Marie's natural beauty and resources make it an ideal location to base a strong tourism industry. Tourism activity growth was identified as a strategic goal in their 1992 Strategic Plan. Today, it enjoys a growing tourism industry. In 2000, a total of 1.7 million people visited the area. Destiny Sault Ste. Marie identified "Tourism Development" as one of its six growth engines with ten specific initiatives to increase the length of stay and the number of visitors. Diversification in manufacturing is another key strategy for Sault Ste. Marie.

Gary, Indiana, has diversified its economy from traditional steel manufacturing industries, with tourism emerging as one of its fastest growing industries. As well as redevelopment of its beaches, parks and golf courses, two

gaming boats have been established on the waterfront. Both have contributed significant economic benefits.

Like Welland, many communities over the past 20 years have developed a diversification strategy to ensure a more balanced and stable economy by reducing their reliance on one particular sector. Also, like Welland, they have identified their competitive advantages to provide a focus for their strategy. All of the communities studies have recognised the need to maintain a manufacturing base alongside other sectors, as a necessity for income generation, skills development and municipal revenues.

2. Leadership

Within a community there are many different groups, individuals and issues contributing to the life of the city. All play a part in the development of a community development strategy, but successful implementation requires leadership. In some cases an individual serves as a leader, for example a mayor, or this critical function can be served by a group.

The Community Development Strategy Committee in Welland is leading the planning process by co-ordinating input from across community stakeholder groups. The plan has been approved by the Welland Development Commission, City Council and Mayor. The plan must have a champion to ensure its implementation. In Cobourg, two successive mayors have led the process, but individual elements or projects have had additional champions. They provide leadership, co-ordination and the energy and drive necessary to ensure that strategies are followed through with actions.

In some larger communities, the economic development organization provided leadership for the community economic development strategy. In Pittsburgh, for example, the Allegheny Conference's roundtable has continued to provide leadership since 1944. In Greater Moncton, leadership initially came from the Chamber of Commerce before being handed over to other economic development groups. The Greater Moncton Economic Commission, the business community and municipal leaders contribute to strategic development.

The City Council's strong leadership position provided the impetus to start the regeneration process in Sheffield. Now twenty years later, the Sheffield City Strategy is divided into projects led by identified 'champions' or leaders. They are incorporated into the strategy document by name and photo as being the leader responsible for that action and alongside each is the name of the delivery agent. In Corby, leadership came from a community based partnership, the Local Strategic Partnership, which developed the Community Development Plan and involved representatives from all interests in the town. In the City of Hamilton individual city councillors serve as champions of specific clusters. As community development is a long term process, continued leadership and drive are vital for the successful development and implementation of the strategy.

3. Partnerships

Partnerships are important not only for bringing the interests in the community together, but also for sustaining economic development itself. The community development project in Welland was initiated with a partnership between three levels of government, municipal, regional (NETC) and federal (HRSDC). The project also brought together, at the steering committee level, the public sector, private sector, volunteer groups, educational institutions, business organizations and the media.

These partnerships strengthen the project by bringing the resources of the groups into the process as well as ensuring their members' and associates' involvement in and commitment to the plan and its implementation. Key ingredients required for the success of partnerships include trust, co-operation, communication and commitment. Partnerships were an essential part of the community planning process in all the communities researched. Three different forms of partnerships were identified.

Community Partnerships

The Vision Seekers group which came together to start the development process in Cobourg is a good example of a community partnership. This group

involved the whole community, including citizens who represented a cross section of the town including government, business, education, social services, intergenerational interests and aboriginals.

Financial Partnerships

Greater Moncton Chamber of Commerce worked hard to form partnerships to start their diversification process. The strategic economic development plan and the marketing and implementation plan development costs were shared by three levels of government and the private sector, totalling \$600,000. The partnerships that have evolved since have been diverse, each with its own structure, involving community agencies, federal and provincial departments and the private sector, as well as the development of strong links between Anglophone and Francophone communities.

The Greater Indianapolis Progress Committee was a forum of business, private sector and government leaders formed to develop the downtown. The costs were shared one-third by the public sector and two-thirds by the private sector.

Political Partnerships

Community economic development strategies involve many community organizations and are impacted by policy and programs at all levels of government. They do not stand alone, nor can they be implemented by one agency. This strategy recognizes that the City is part of the Regional Municipality of Niagara and in particular benefits from a regional labour market.

Political partnerships bring together broad interests in the community and their resources to help ensure that there is a commitment to a unified approach. Political partnerships are very important for lobby efforts to senior levels of government. Sault Ste. Marie worked in partnership with the federal and provincial governments and industry to undertake a number of initiatives in the early 1990s to create economic stimulus and diversification. This included RAPIDS (Research, Action, Promote, Infrastructure, Delegate, Support) which

was a roundtable of representatives from all levels of government to generate the planning process.

Possibly the longest running partnership and the best known, is the Allegheny Conference in Pittsburgh, which was formed in the 1940s. It remains today and includes representation from both the private and the public sectors. In Gary, Indiana three neighbouring communities including Gary partnered to form The Empowerment Zone to attract new businesses to the area. To reverse the trend of steel closures, Lehigh Valley's economic development department, private enterprise and local planners joined together to work out a solution (See full Community Models Report). To apply to become one of the UK government's new Urban Regeneration Companies, the town of Corby united the private sector with local, regional and national agencies in a partnership to form Catalyst Corby.

Sheffield City Council realized that manufacturing could no longer be relied on as its major source of employment. A diversification and regeneration strategy was essential. The Council immediately formed partnerships with local businesses and higher education to co-ordinate development of the strategy. Those partnerships were critical for enabling Sheffield to secure both UK and EU funding for projects. Partnerships remain at the core of the city's strategy today. The Sheffield First Partnership brings together agencies responsible for employment, environment, equality, investment, inner city development, economic development and health in a forum that is accountable for delivering the city's strategic plan.

While there are overlaps between the various forms of partnerships, the point is that the development and implementation of a strategic plan depends on their formation in the community. No one group can implement the strategy on its own.

4. Funding

Downtown revitalisation, attracting new investment, supporting specific initiatives, the development of the strategy itself, brownfield development and infrastructure all require funding. However, municipalities, like Welland, have little flexibility in raising funds other than through municipal taxes. The communities researched have all found it necessary to access funding outside the community to develop their community plan, to implement it and to compete successfully for new investment. Some specific strategies have emerged from the community models research relating to accessing funding and programs.

Funding Partnerships

In the UK, funding for economic development is available both from central government and from the European Union. There is strong competition for this money. Sheffield was only able to successfully start accessing programs when it formed public and private partnerships to present as a community proposal. The various partnerships that have evolved in that city over the last twenty years have become more sophisticated. The latest is the Sheffield First Partnership representing all aspects of the city including inner city development, investment, employment, education, environment and health. One of their key objectives is to present a *“united view to Government (UK and European) in attracting the support and resources to do what needs to be done.”* In Pittsburgh, after the emergence of some partnerships, Strategy 21 was formed which enabled public and private agencies to speak with one voice when requesting state funds.

Tax Incentives

Tax incentive areas or Enterprise Zones were first set up in the UK in the 1980s to provide tax-related and other incentives to encourage private sector investment to stimulate the economies of depressed areas with high

unemployment. Since then, similar programs have been established in other parts of the world including the U.S. In the early 1980s, many states developed Enterprise Zones to support the development and growth prospects of economically depressed areas. These programs employ a mixture of tax and spending measures to encourage economic growth and job creation. In the past ten years seventy-two Empowerment or Enterprise Zones have been established in the U.S. offering tax incentives to businesses that locate or expand in these areas. One of the researched communities, Gary, Indiana, has an Empowerment Zone offering tax credits for creating jobs and for environmental clean up of brownfield land. Their initiative builds on traditional strengths with a major investment in education and training. The Empowerment Zone involves co-operation between three neighbouring communities. This strategy has proved to be successful in attracting new investment.

Some Canadian provinces such as Prince Edward Island, Newfoundland and Labrador and Quebec have established their own tax incentive zones. There are arguments for and against financial incentives but the lack of them puts the community at a disadvantage in attracting new businesses and when competing with other areas for inward investment.

An Ontario tax incentive pilot project was announced by Premier Ernie Eves in 2002. Among other areas, the Region of Niagara in partnership with the municipalities in the region, including Welland, submitted a joint proposal for a Bi-National Tax Incentive Zone. In 2003, the Provincial government announced that the whole of Northern Ontario would be designated as a Tax Incentive Zone with some zones to be announced in Southern Ontario in the future.

Political Support

The communities studied have shown the importance and the power of one unified voice when seeking funding support. Cobourg has been particularly effective in raising dollars by bringing its MP and MPPs together to lobby for funding. The town was able to successfully tap into federal funding to develop

the downtown area. To access funding from within the community, community fundraisers were brought on board.

Greater Moncton was able to share the costs of its development plan with three levels of government and the private sector for a total of \$600,000. Welland has also brought together municipal, regional and federal government in its Community Development Strategy Plan, funded principally by HRSDC and other stakeholders. Greater Moncton, also used the Capital Recovery Program to improve the downtown area.

Sault Ste. Marie benefited significantly from federal funding through FedNor. Destiny Sault Ste. Marie has received \$500,000 from FedNor to be used to prepare, promote, manage and implement the strategy. The City has earmarked \$2.5 million for identified priorities. This seed fund will enable the community to access additional federal, provincial and private sector contributions.

Welland has six downtown incentive programs in place and is currently in the process of developing a Community Improvement Plan policy for brownfield development. This plan utilizes a \$60,000 matching grant from the Federation of Canadian Municipalities (FCM).

Based on the community research, important strategies need to involve political representatives to lobby for funding and put forward the case for Welland by highlighting its specific needs. Secondly, partnerships are crucial to present a united community proposal and strengthen the case for funding. Community agencies need to be working together rather than in competition. Thirdly, tax incentives for attracting industry are widely available in the UK, US, and also other parts of Canada including Northern Ontario. While opinions differ as to the long term success of financial incentives, in the short term at least, Welland remains at a disadvantage if it is unable to benefit from similar incentives.

5. Community Ownership

For a community development plan to be developed and implemented successfully it has to have the support of the community and all key stakeholders. The community has to approve the objectives and be a part of the process. The plan cannot be imposed on the community. It has to be developed from groups within it so that they can contribute to, support and sustain it.

The community models researched all illustrate the importance of community involvement. Cobourg's successful strategic planning was started by a group called the Vision Seekers. This group was formed to obtain input from across the community. They gathered information through community forums. As the plan developed, Cobourg appointed 'champions' or individuals within the community to lead projects to help ensure that they were successfully implemented.

Greater Moncton's strategy was also community driven. They consider their greatest resource to be their people and their leaders. They have committed thousands of hours of voluntary work to improve the community, accept change as healthy and work it to advantage. The City of Hamilton's strategy is the result of significant research including direct input from focus groups and personal interviews with key stakeholders from each sector.

Sault Ste. Marie's BEC (Building an Extraordinary Community) process was a three-year grassroots community strategic planning process to help determine objectives for the community. It was supported by three levels of government funding and hundreds of volunteers. In 2001, this process was followed by the formation of a committee of community representatives to develop a Growth Mandate Strategy.

Indianapolis started its community development with the Greater Indianapolis Progress Committee, which was a forum of business, private sector and government leaders. It established community-based task forces to analyze and recommend action on some of the city's most difficult problems.

Pittsburgh formed a number of community consultation groups over the years as its strategic planning process evolved. If anything, it has been hindered by the number of individuals involved. The White Paper produced in 1993 had over 5,000 participants and was unable to establish a concise vision for the city. Subsequent organizations, like the Pittsburgh Regional Alliance have addressed this.

Sheffield's community development, like Pittsburgh, has evolved over many years. Initially they brought representatives from many different sectors of the community together to form a strategy. Over the years, a number of representative forums were unable to fully implement a succession of plans. At the end of the 1990s collective ownership of the city strategy was given to a new group called the Sheffield First Partnership. They brought together individuals representing various interests in economic development. All had to apply to be part of the board and individuals appointed could not send a substitute. The appointee was at the highest level. This strategy has proved successful in putting an end to many disputes and moving forward with the implementation of the city strategy.

The downtown planning process in Brantford is community based. There are 65 volunteers from a cross section of the community who participate in focus groups to provide input to the downtown plan.

Similarly, Welland has held a number of consultations with key stakeholders to seek input into the strategy as it evolved. The Community Development Strategy Committee formed a communications sub committee responsible for providing feedback to the community. In addition, the project was presented to Council and to the people of Welland at the Mayor's Town Hall meeting, to ensure as much community involvement as possible.

6. Long Term Planning

The community models that have been researched were selected principally for two reasons. First, most have a similar industrial background and

connection with the steel industry. Secondly, most have engaged in the planning process, with several now on second or third plans. The success or failure of these strategies should only be judged in the long term and experience demonstrates, the process can involve many years.

The UK faced collapse of its steel industry at least twenty years ago and the events served as a catalyst to begin diversification and regeneration. Most of the major industrial centres were affected either directly or indirectly. These centres include Glasgow, Liverpool, Manchester, Birmingham, Newcastle and Sheffield. Sheffield was selected as a model because of its similarity to Welland. Regeneration in Sheffield can be divided into three distinct phases and is still ongoing. The city strategy is a living document constantly being reviewed. The first phase in the early 1990s was the decision to host the World Student Games with funding for sports facilities provided by council and private investors. During this phase a number of major projects were undertaken, including the Don Valley Stadium. The second phase which extended from mid to late 1990s, focussed on inner city revitalisation projects and neighbourhood projects and was supported primarily by lottery funds. The third phase, which is post 2000 combined private sector partnerships and/or commercial borrowing to support specific opportunities including the City Hall and Central Library.

Although employment figures and economic growth statistics suggest that the Sheffield experience was successful, this was not always the case. The World Student Games incurred a substantial loss, which produced criticism of the strategy and Council's investment. However, over a ten year period a total of 395 major sporting events were held, and more than 900 jobs were created. An additional 576,000 visitors came to the city and £33 million flowed into the Sheffield economy, demonstrating the long term success of the strategy.

In Canada, Cobourg started its regeneration plans over ten years ago. By gathering information from the community it developed a series of 'Vision Themes'. These were categorised into: The Quick Hits – ideas that could be put into place within six months; The Change Ideas – requiring a longer term focus

and The Wish List – broader more sweeping ideas. It is important to have smaller achievable goals to sustain the process in the long term. Ten years later Cobourg is still working on its regeneration and can see successes. Four years into the process and part of the “Vision Seekers” long term wish list, a Tourism Strategy was developed.

The Strategic Implementation Plan for Sault Ste Marie was developed in 1992 and successes are evident over the next ten years, particularly with respect to investment attraction. With funding support from FedNor, the latest strategy “Destiny Sault Ste. Marie” was completed in 2003. It is a tool by which progress toward long-term goals will be monitored, evaluated and managed.

Like Sheffield, Pittsburgh has continually reworked its economic development plans over time. A number of organizations were created and strategies implemented to move away from traditional manufacturing and to improve the city’s image. The original strategy was designed to address environmental and transportation problems. In the 1980s, the focus moved to economic diversification as a result of the collapse of the steel industry. In 2003 the Image Gap Initiative was launched as Pittsburgh still strives to develop an identity that is not linked to steel production. Although Pittsburgh has been successful in diversifying into new growth industries, achieving a low unemployment rate and low cost of living, issues related to population growth and retention remain. Pittsburgh has an aging workforce and a projected shortage of labour in years to come; the current strategy now focuses on these issues.

Indianapolis took three decades and the administrations of two mayors to successfully develop its focus on sports. In 2001, the city began to focus on the development of cultural tourism.

For all community models show strategic planning was pursued over time and sufficiently flexible to adopt to change. While the process is necessarily long term, it was important to incorporate short- term achievable objectives to sustain momentum.

7. Human Resources

Workforce development and labour market issues are making their way to the forefront of community economic development. A skilled and flexible workforce is fundamental to business retention and attraction in an increasingly knowledge-based economy. Among the eleven communities studied, all have addressed the importance of their labour market, but it is only in more recent years that comprehensive labour market strategies have been developed to support economic development plans. Three communities stand out as being particularly proactive in this area, Pittsburgh, Sheffield and Hamilton.

Since the 1950s, Pittsburgh has benefited from substantial R&D activity performed by large corporations such as U.S. Steel, Westinghouse, Alcoa and Gulf. In addition, the city's universities attract considerable funding for research each year creating a knowledge base within the workforce. The Digital Greenhouse and the Life Sciences Greenhouse initiatives are successfully commercializing emerging technology and creating a critical mass of related expertise.

Two organizations, Catalyst Connection and the Three Rivers Investment Board work with the school boards and students to help ensure the development of skills necessary to succeed in the workforce. They incorporate the needs of industry in the school curriculum. The Pittsburgh Technology Council created a number of workforce development programs, including a Manufacturing Pathways Initiative and Adventures in Technology which encourage students to consider careers in manufacturing.

Pittsburgh suffers from a declining and aging workforce and is using some creative programs to keep its young people and attract natives back to the city. The Boomerang Initiative project has compiled a database of former citizens who receive regular emails on successful achievements in the city and job opportunities in an effort to attract them back.

The City of Sheffield recognizes that in order to achieve its objective of becoming a diverse and high growth economy in Europe, it is essential to

develop a skilled workforce. The Sheffield Learning Plan 2002-2004 complements and supports the Sheffield City Strategy 2002-2005. It provides a framework for the development of education, skills and lifelong learning. Sheffield has the benefit of two universities, a major teaching hospital and a range of research institutes centred around existing and growing strengths in manufacturing and high growth technology fields.

In 2002, Hamilton's Development Department commissioned a major study of the community's human resource needs which coincided with the development of its economic development strategy. HR Matters I, produced in 2002, is a report on labour force trends and HR Matters II developed in 2003 is a business plan which identifies the strategies and actions to counteract the impact of Hamilton's changing demographics. The City understands that a supply of skilled workers is essential to implement its Economic Development Strategy.

Greater Moncton, Sault Ste. Marie and Lehigh Valley have all been supported in their diversification strategies by their universities. Lehigh Valley has competitive advantages through the research facilities available in optometric and biotechnology at Lehigh University, as well as the engineering and technology specializations that were in place to support the steel industry. These programs were also beneficial for the development of bioengineering.

A profile of Welland's labour market has been developed as part of the Community Development Strategy. A plan for labour market development is important to support the strategic plan. As in other communities, this has to be achieved by ensuring that industry works with the local educational institutions, in this case, Niagara College and Brock University, to ensure that the knowledge and skills necessary to support Welland companies and provide meaningful careers for residents are being taught locally. This is critical not only to attract new industry and jobs but also to support the industry already here and maintain its competitiveness.

8. Land Development and Brownfields

The availability of land is crucial to attract new industry and provide the opportunity for existing industry to expand. Brownfield sites are a legacy of traditional manufacturing and in many cases need to be cleaned in order to improve the image of the community and in the process make more industrial land available. All eleven communities developed a brownfield strategy.

In Cobourg, the clean up and redevelopment of four adjacent brownfield sites was a \$162 million project including residential construction, a new marina and waterfront that now attracts in thousands of tourists each year. Success is attributed to the common objectives established by the three parties involved; land owners, the public and the municipality. In addition to creating tourism opportunities and contributing to downtown revitalization, the project generates revenues and jobs. For instance, the annual waterfront festival generates \$3.6 million, the marina brings in \$3.1 million annually while the construction of the new waterfront supported over 100 jobs.

The Gateway project in Sault Ste. Marie involved the combining and cleaning of four separately owned brownfield sites. The northern half of the site has been developed as a casino and the southern half is currently vacant, but there is a major tourism project under consideration. The site has created a new gateway to the community on the waterfront, the casino has created 550 jobs and approximately \$700,000 in municipal taxes, in addition to the environmental and aesthetic benefits of the clean up.

One of the largest brownfield redevelopment plans in Atlantic Canada is in Greater Moncton. The site has now been developed as CN Sportsplex, Emerson Business and Technology Park and a residential neighbourhood called Franklin Yard. Success is attributed in part to extensive community consultation, particularly at the beginning of the project. Among many benefits, it has resulted in job creation, tax revenues for the city, increased residential and recreational facilities.

The Lower Don Valley was the site of the steel industry in Sheffield and the brownfield land was the legacy that was left. This area has now been redeveloped as the Meadowhall Shopping Centre, the Don Valley Stadium and Don Valley Arena, as well as residential development. The Don Valley has been transformed and is now a source of both pride and revenue for the city.

The Bethlehem Steel Mill in Lehigh Valley was turned into a multi-use facility including the American National Industry Museum. It incorporates a steel smelting production line, a 250 customer hotel and conference centre, an ice rink, a theatre with ten screens, a large financial centre, and a family entertainment centre. The steel mill also has land for an industrial park. When completed, it is anticipated to create 10,000 jobs and provide \$70 million in annual income from taxes.

The site of LTV Steel's Pittsburgh Works has been reclaimed and reused as a technology park. The 40-acre site includes the University of Pittsburgh's Center for Biotechnology and Bioengineering, the Carnegie Mellon Research Institute and Aristech Chemical Corporation and the Pittsburgh Technology Council offices. Other sites in the city include Washington's Landing, Nine Mile Run and South Side Works and have been developed for residential use, recreational and manufacturing use. Most developments have involved public/private partnerships.

In 2001 the City of Hamilton prepared a Community Improvement Plan known as the Environmental Remediation and Site Enhancement Plan or the ERASE Plan. The City provides financial and other incentives to promote the redevelopment of brownfield sites.

Welland is already undergoing a process to address the problem of its brownfields. As the community models demonstrate, brownfield development improves the environment for residents, and helps to attract prospective investors, and provides land for existing business expansion.

9. Quality of Life and Place

Downtown revitalisation, clean up of brownfield sites and improvement of amenities all provide an improved environment that helps to attract workers and companies. It instils confidence and pride within a community.

All eleven communities have recognized the importance of their natural assets whether it be a canal, as in Welland, or a waterfront, or an attractive central location. Community profiles are available at the City of Welland web site with detailed descriptions of community developments. The majority have identified downtown revitalization and brownfield clean up as priorities.

Recognizing the importance of quality of life to workers and residents, as far back as 1944, the Alleghany Conference was made responsible for improving Pittsburgh's air quality. The organization also had a mandate to attract inward investment. Projects that have been undertaken by communities range from large scale waterfront development as in Gary and Pittsburgh, to much smaller scale initiatives. For example, in Cobourg train whistles were eliminated, parking metres have been eliminated and smoking in the town centre has also been banned to improve the downtown area. Large-scale photos were used to decorate empty store windows while shops were being marketed.

Downtown development or revitalization has been at the forefront of most of the community strategies. As in Welland, many have introduced financial incentives in order to attract private investment. In Cobourg, revitalizing the downtown was one of the first priorities which resulted in an attractive and thriving downtown core. As recent as five years ago, many of the shops were vacant. The town has waived development charges, frozen property assessments at the pre-improvement rate, and introduced heritage loans offered at less than prime rate.

Brantford's downtown was once voted the worst in Ontario. The community recently initiated a community-based downtown planning process and approved a Downtown Business Performance Grants program to encourage investment in the area. Greater Moncton attributes much of its success over the

years to the quality of life it offers its residents, as well as amenities, quality education and recreational facilities.

Sheffield has converted the brownfield sites of the Lower Don Valley left by the steel industry into sports stadiums and Europe's largest retail park, Meadowhall. The sports events and facilities showcase the city and provide residents with a sense of identity and pride as well as renewed business confidence.

Pittsburgh has developed both the waterfront and the downtown area. The new PNC Park and Heinz Field stadium on the waterfront were financed by private foundations. Pittsburgh plans to have a mix of residential and commercial occupancy in the downtown area. The city has also developed the Station Square area with a hotel, shops and restaurants by the river. Artefacts from the steel industry have been placed along the riverfront providing an attractive and interesting reminder of Pittsburgh's heritage.

The Gateway Project in Sault Ste. Marie involved cleaning four separately owned brownfield sites and in the process creating a new waterfront 'gateway' to the community. The town of Gary has exploited its proximity to Chicago and invested in its beaches, parks, golf courses and waterfront to attract weekend visitors.

When the steel industry collapsed in Lehigh Valley, the community was left with the legacy of the Bethlehem Steel Mill. It is being developed as a hotel and conference centre with recreational facilities in a project that is projected to cost \$1.5 billion, create 10,000 jobs and provide \$70 million in annual income.

These examples range in size and scope but all emphasize that quality of life or place in a community is vital. The City of Welland is already addressing the development of the canal for recreational purposes which provides a natural focus for the community, as well as the development of the downtown. All of the communities researched provide interesting and creative examples of initiatives that helped them to move forward to a better quality of life.

CONCLUSION

The strategies that have been identified from the communities studied provide a wide range of creative ideas that may be useful for Welland's strategic development. Many of the communities have over ten or twenty years experience in this process and have learned valuable lessons about what works and what doesn't. They all demonstrate that commitment to development strategies can lead to economic diversification, prosperity and proud communities.

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Richard Allen, Executive Director Hamilton Industry Education Council

Roger Cranville, Honorary Canadian Consul, Pittsburgh/Senior Vice President Business Investment, Allegheny Conference, Pittsburgh

Peter Delanty, Mayor, Cobourg

Wayne DeVeau, Wayne DeVeau and Associates, Project Champions, Cobourg

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Jane Heiple, Vice President Workforce Education and Development, Catalyst Connection, Pittsburgh

Brenda Kuntz, Vice President Existing Business Services, Pittsburgh Regional Alliance, Pittsburgh

Jan Lauer, Senior Vice President, Allegheny Conference, Pittsburgh

Dr. Richard Loreto, Madison Avenue Demographics Group

Ron Painter, Executive Director, Three Rivers Workforce Investment Board, Pittsburgh

Suzi Pegg, Director Global Investment Group, Pittsburgh Regional Alliance, Pittsburgh

Alex Prince, City Communications Officer, Sheffield Chamber of Commerce

Phil Roberts, Chief Executive, Sheffield First For Investment

Norm Schleeahn, Bus Dev Consultant with the City of Hamilton's Eco Dev dept.

Joe Sheffer, Economic Development Officer, Cobourg

Dr. Lynn Stewart previously Manager of Operations, Citizen Action Group

Vince Taylor, Director, Sheffield First Partnership

Nigel Tomlinson, Chief Executive, Sheffield Chamber of Commerce

Mike Walsh, Editor, Welland Tribune

Shaun Warren, International Trade Team Manager, South Yorkshire International Trade Centre

John Whitehouse, Director, International Trade Centre, Sheffield Chamber of Commerce

APPENDICES

Appendix A

Welland Community Development Strategy Committee

Mayor, Damian Goulbourne, City of Welland
Chair, Dan Degazio, Manager, Economic Development & Tourism, City of Welland
Dave Billington, Director of Welland Centre, Convergys Customer Management Canada
Larry Cote
Frank DeChellis, Owner, Internet Access Worldwide (IAW)
Joe Eigner
Barbara Fennessy, Manager, Niagara Trade Centre, Niagara Economic & Tourism Corporation
Travers Fitzpatrick, City Manager, City of Welland
Lina Henri, Admin. Assistant, Economic Development Office, City of Welland
Valerie Kuhns, Principal, Kuhns Partnership
Councillor Barry Sharpe, City of Welland
Roy Timms, President, Timbro Design/Build Contractors
Mike Walsh, Publisher/General Manager, The Tribune
Bob Watson, General Manager, Atlas and Civic Credit Union
Ed Zanetti

Appendix B

Welland Labour Market Development Committee

Chair, Barbara Fennessy, Manager, Niagara Trade Centre, Niagara Economic & Tourism Corporation
Glen Bradley, President, CAW Local 1997
Dan Degazio, Manager, Economic Development & Tourism, City of Welland
Tanya Drake, Senior Manager, Human Resources, Convergys Customer Management Canada
Bryan Dowling, Human Resources Manager, GDX Automotive
Carol Dupuis, Labour Market Information Analyst, Human Resources and Skills Development
Amy Elder, Brock University
Claire Gerencser, Executive Director, Welland Heritage Council & Multi-Cultural Centre
Valerie Kuhns, Principal, The Kuhns Partnership
Ted Palmer, Chief Administrative Officer, Business Education Council of Niagara
Duncan MacDuff, Workplace Learning, Skills Development, Niagara College of Applied Arts & Technology
Carol Maingot, Coordinator-Community Services, District School Board of Niagara
Trudy Parsons, Executive Director, Niagara Training & Adjustment Board
Diane Sanderson, Executive Director, Niagara Business Leadership Council
Lynn Stewart, Executive Director, Employment Help Centre
Nancy Sutton, Project Manager, Niagara Tourism H.R. Council
Lara Ventresca, Coordinator-Labour Force Development, Business Education Council of Niagara
Lori Watson, Manager of Employment Services, Regional Municipality of Niagara

Appendix C

Community Stakeholder Meeting Participants

Mayor, Damian Goulbourne, City of Welland
Facilitator, Dr. Emanuel Carvalho, Professor, University of Waterloo
Donald Belanger, President, Caisse Populaire
Sam Bruzzese, Manager – Industrial Engineering, Stelpipe Ltd.
Mark Carl, Member, Welland Recreational Canal Corporation
Brian Colburn, President, Bujold Colburn Employer Benefits Agency
Greg D’Amico, Chairman, Tourism of Welland Niagara & Downtown BIA
Stephan Daoust, Acting Director of Welland Centre, Convergys Customer Management Canada
Frank DeChellis, Chair, Welland Development Commission
Dan Degazio, Manager, Economic Development & Tourism, City of Welland
Boyd deWaard, President, Bosch Rexroth Canada Corporation
Tanya Drake, Manager Human Resources, Convergys Customer Management Canada
Carol Dupuis, Labour Market Information Analyst, Human Resources Skills Development Canada
Joe Eigner, Community Development Strategy Committee
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Travers Fitzpatrick, City Manager, City of Welland
Claire Gerencser, Executive Director, Welland Heritage Council & Multi-Cultural Centre
Anne Guillemette, General Manager, Best Western Rose City Suites
Lina Henri, Administrative Assistant, Economic Development, City of Welland
Lucie Huot, Executive Director, Club 2000 Niagara
Doug Johnson, Chair, Venture Niagara
Paul Joly, General Manager, Caisse Populaire Welland Limited
Geoff Kirkwood, General Operations Manager, Stelpipe Ltd.
Val Kuhns, Trade Consultant, Niagara Economic & Tourism Corporation
Ron Lemon, Member, Tourism of Welland Niagara (TOWN)
Lloyd Longfield, General Manager, Hydac Corporation
Mike Lottridge, Member, Welland Recreational Canal Corporation
Duncan MacDuff, Workplace Learning, Skills Development, Niagara College
Gus Marcello, Member, Welland Recreational Canal Corporation
Geri Morrone, Branch Manager, Niagara Credit Union Limited
Kathy Murray, Labour Force Development, Business Education Council of Niagara
Trudy Parsons, Executive Director, Niagara Training and Adjustment Board
Frank Rupcic, General Manager, Venture Niagara
Tom Scott, Plant Manager, GDX Automotive
Councillor Barry Sharpe, City of Welland
Lynn Stewart, Executive Director, Employment Help Centre
Mark Tayti, Journalist, The Tribune
John Verhage, President, Hydraserv Limited
Lori Watson, Manager of Employment Services, Regional Municipality of Niagara
Robert Watson, General Manager, Atlas & Civic Employees Credit Union