

# Final Report

## Nipigon and Red Rock Indian Band: Economic Diversification Strategy



November 11, 2008



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## 1 Purpose of this Interim Report

There are five main objectives to this interim report:

1. Complete a current economic profile
  - Using the literature and data provided by the communities in conjunction with a wide selection of one-on-one meetings with business owners and the project steering committee (including a group vision session).
2. Complete an organizational investment readiness/willingness assessment
  - This is an important part of identifying appropriate marketing objectives and directions and gaining an understanding of how ready Nipigon and Red Rock Indian Band and potential other partners are to deliver an investment program.
3. Establish local competitive advantages/disadvantages
  - Strengths and weaknesses may be common to both Nipigon and Red Rock Indian Band and its competitors, while competitive advantages and disadvantages will differentiate the community from its competitors. Competitive advantages form the nucleus for Nipigon and Area's unique value proposition – the “wow” that will motivate potential investors and/or their agents to take a closer look. Competitive disadvantages are those elements that the communities need to fix (or become less of an obstacle) if it is critical to the site selection decision or needs to stray far away from in its promotion/selling effort.
4. Assess key criteria and select sectors/clusters
  - Offering a short-list of the most compelling investment sectors/clusters.
5. Understand and assess roles of local organizations
  - Provide an overview of the organizational climate and which organizations are poised to assist with investment attraction efforts.

The focus of the strategy will be specific, precise and rooted in the real world. From this perspective, action and strategic directions identified must be:

- Positive, productive and realistic
- Tangible and achievable
- Affordable and actionable given the resources available
- Appealing to potential partners both within the community and outside

### 1.1 Next Steps

Looking forward, the next steps of the project are to concentrate on implementation:

1. 3 year Marketing Action Plans
  - The Marketing Action Plan will become an integral part of the day-to-day functions of the Economic Development Offices and form the basis for future budgetary decisions (allocation of both financial and human resources). Recommendations will go beyond the type of promotional media to be used (direct mailers, trade shows, cold call initiatives, website) and, building off of the investment readiness assessment, make recommendations on how Nipigon and Red Rock Indian Band can provide top-notch

economic development service. Sector Marketing Plans will be developed for the fiscal years 2009, 2010 and 2011 based on estimated budgets. These plans will:

- isolate methods by which the communities can work to achieve a Gold Standard of Services delivery
  - develop a key message for each sector that highlights the area's strengths as an investment location
  - pinpoint promotional campaigns and tactics that should be used to reach the selected markets and how success is measured
  - identify enhancements to the website and existing promotional materials
  - identify new promotional materials that are required
  - suggest local, regional, national or international partnerships that will help Nipigon and RRIB deliver their message
  - recommend methods to track client activity and mechanism to report development activity.
2. Identifying implementation responsibilities
    - Answer the question: When is it best to work in a regional partnerships and when is it best to "go it alone"?
  3. Outline of marketing material content
    - The goal is to present an overall selling proposition for each sector and position Nipigon and Red Rock Indian Band as a location of choice for target companies considering expansion.
  4. Concept designs of promotional materials
    - As an option, bring in a graphic design firm to complete visual concept designs of promotional materials including electronic and print media. Also work with the communities on specific tactical items that are identified in the Marketing Action Plan. These could include developing cold call scripts, writing approach letters, writing content for e-newsletters, etc.
  5. Prospecting target list for three sectors/clusters
    - Based on a thorough examination of the sectors and who the growth companies are in these sectors, provide a list of short-term and long-term investment attraction targets and provide a Top 10 "Need to Know" list that identifies key intermediaries and influencers who are active in the sector and either have knowledge of investment activity or are working with investment prospects on an ongoing basis.
  6. Build list of business incentives
    - Identify the potential local, provincial and federal incentive programs that should be established and those that are already established and can be immediately incorporated into the sales/promotions program.
  7. Implementation progress meetings
    - After-care meetings with the economic development staff and other organizations named in the implementation plan to ensure Nipigon, Red Rock Indian Band and its partners are fully satisfied with the consultant's work. In addition, it is an excellent way to assist with implementation. Progress made to date will be reviewed and discussions about next steps will take place.

## 2 Economic/Community Profile

A cornerstone to developing an economic development strategy is an understanding of a community or region in terms of its economic assets – business base, labour force, quality of life, etc. – as well as its potential. This section contains a number of figures that will display the current state of the economy and significant trends that have been experienced in Nipigon. It will set the stage for the detailed examination and discussion of competitive advantages, competitive disadvantages and strategic objectives.

Within this section there will be a focus on:

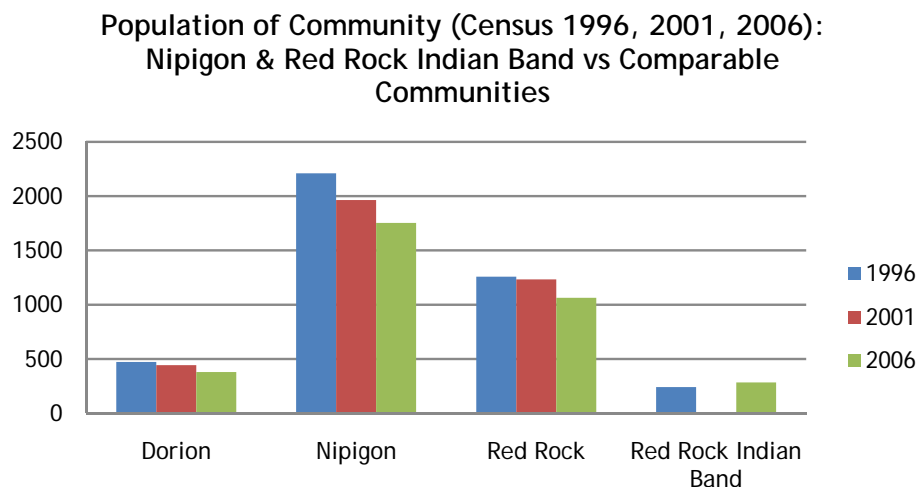
- Competitive results such as construction activity, employment and income levels
- Competitiveness issues such as tax rates, cost of development, education levels and labour force skills.

**It should be noted that Statistics Canada collects a limited amount of Aboriginal specific information and for that reason, some data has been difficult to obtain for the Red Rock Indian Band. Extra effort was made to work with the Red Rock Indian Band to obtain as much information as possible.**

### 2.1 Population & Labour Force

The recent 2006 Census confirms the population of Nipigon to be 1,752. This reflects a 10.8% decrease from the 2001 Census. This figure represents a significant loss of its residents over a five year period, especially when contrasted with the provincial increase of 6.6%. On the other hand, Red Rock Indian Band has shown a slight increase in population, but when combined with losses in Dorion and Red Rock, there has been a total loss of population in the region over the last 10 years – refer to figure 1. **Please note that population figures for the Red Rock Indian Band could only be obtained for 1996 and 2006.**

**Figure 1 – Population of Community, 1996-2006**



Source: Statistics Canada

Figure 2 – Population Age Structures 2006

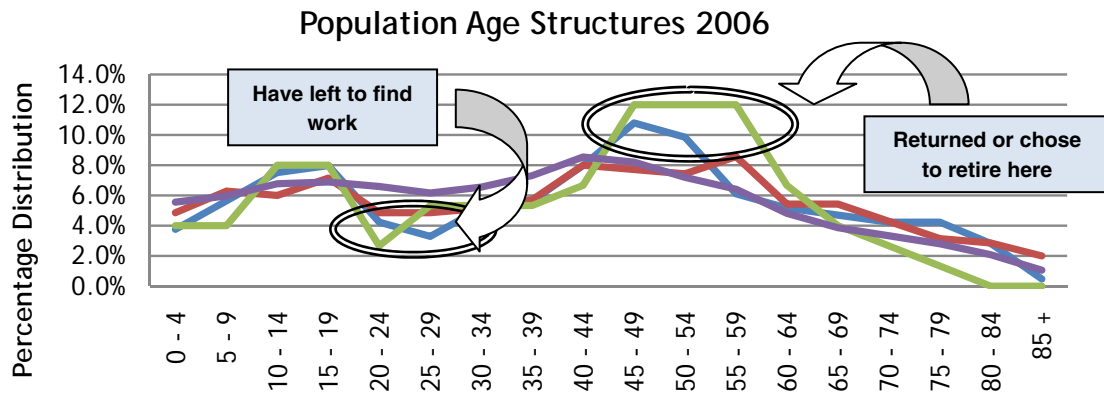
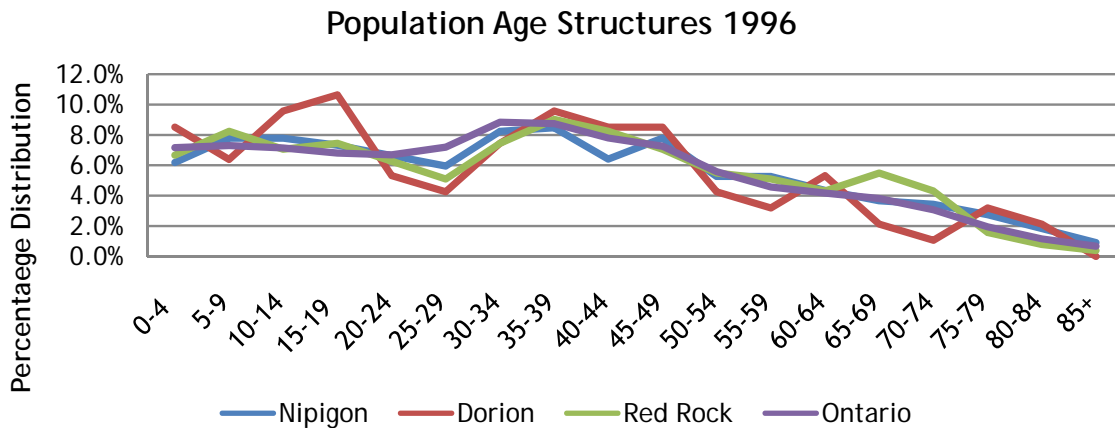


Figure 3 - Population Age Structures 1996



Source: Statistics Canada

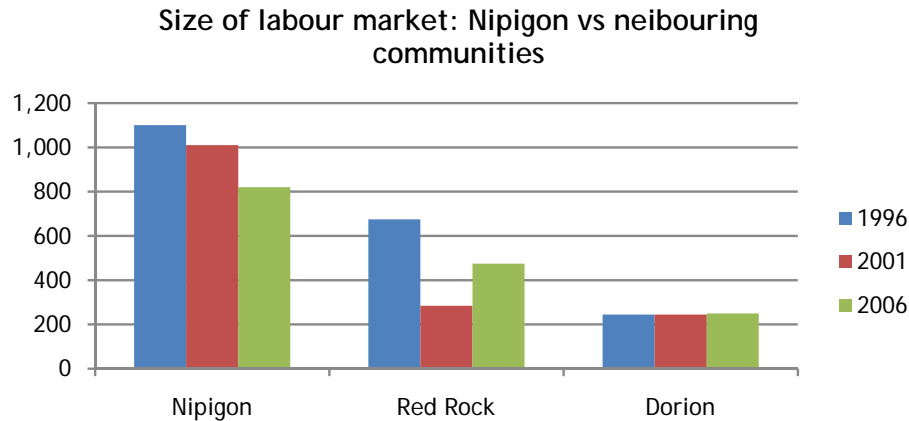
Please note that figures for the Red Rock Indian Band could not be displayed on the graphs, owing to differences in age categories.

Figures 2 and 3 illustrates that the region has a low percentage of persons within the key labour market cohorts (25-34 & 35-44 years old) and that it has been further exaggerated versus the Ontario average during the last 10 years. Due to differences in the way data is collected, the Red Rock Indian Band's information is not displayed. We do know that RRIB's median age in 2006 was 30 years old, while it was much higher in Nipigon (43). This points to a much younger community and one that, with appropriate skills development, offers potential employers the option of supplementing a mature workforce with those of a younger generation.

## 2.2 Size of labour market

Nipigon is a community that has an employment base and population greater than its neighbouring communities. Figure 5 measures the labour force of Nipigon to its immediate neighbours.

Figure 4 – Size of labour market



Source: Statistics Canada.

Figure 5 – Employment Statistics

Employment Statistic	Nipigon Township	Red Rock Indian Band
Participation Rate	58%	69%
Employment Rate	52%	56%
Unemployment Rate	8.5%	18.5%

Source: Statistics Canada

## 2.3 Employment by Sector

Between 2001 and 2006, Nipigon's labour force declined from 1,020 to 820, a change of 24.4%.

It is noticeable that the predominant industry in Nipigon in 2001 was Logging and Forestry. This industry lost 30 jobs from 2001 to 2006, a decline of 50% from the employment level in 1996. Ontario on the other hand grew 13.78% in this sector, which means that Nipigon was lagging in this sector in 2001.

Figure 7 shows the distribution of employment across all Nipigon sectors with time. It can be noticed that Manufacturing constitutes the greatest share of employment across all sectors (20.5%) in 2001. This declined to 18.6% in 2006, reflecting the challenges within the industry. Healthcare and social assistance is the second largest employer within Nipigon, making up 16.7% in 2006 – a dramatic increase since

2001. The Retail Trade industry is the third largest industry by distribution in Nipigon with 14.7% of all workers in the labour force in 2006.

The sectors with the largest growth in share of employment have been Educational services followed by Healthcare and social assistance. Although Nipigon is relatively diverse in some sectors, the dependence on manufacturing has presented many challenges for the township since 2006. **Data is not available for Red Rock Indian Band.**

**Figure 6 – Employment by Industry**

Township of Nipigon	2001 Employment	2006 Employment	% Distribution - 2001	% Distribution - 2006
Agriculture, forestry, fishing and hunting	25	10	2.4%	1.1%
Mining and oil and gas extraction	10	0	1.0%	0.0%
Utilities	60	20	5.7%	2.3%
Construction	10	15	1.0%	1.7%
Manufacturing	215	165	20.5%	18.6%
Wholesale trade	0	10	0.0%	1.1%
Retail trade	200	130	19.0%	14.7%
Transportation and warehousing	45	40	4.3%	4.5%
Information and cultural industries	10	0	1.0%	0.0%
Finance and insurance	10	10	1.0%	1.1%
Real estate and rental and leasing	0	10	0.0%	1.1%
Professional, scientific and technical services	10	10	1.0%	1.1%
Management of companies and enterprises	0	0	0.0%	0.0%
Administrative/Waste Mgmt/Remediation Services	10	10	1.0%	1.1%
Educational services	35	95	3.3%	10.7%
Health care and social assistance	130	145	12.4%	16.4%
Arts, entertainment and recreation	15	10	1.4%	1.1%
Accommodation and food services	115	75	11.0%	8.5%
Other services (except public administration)	50	60	4.8%	6.8%
Public administration	100	70	9.5%	7.9%

Source: Statistics Canada

## 2.4 Labour Force by Occupation

A widely-used method for determining where business strengths for a particular community lies in the process of examining the community's labour force profile based on occupational categories. Figure 8 provides a comparison of the labour force distribution by occupation in the Townships of Nipigon and Red Rock for the period from 2001 to 2006. These results are taken from Statistics Canada and they provide information on what occupations the residents of Nipigon are employed in, even if those jobs are located outside the Township. The Township's labour force concentration is the highest in the three following occupations:

- Sales and Service (23.9%)

- Trades, Transport and Equipment operators (18.9%)
- Occupations unique to processing, manufacturing and utilities (18.9%).

The Township also has a significant proportion of occupations in:

- Business, finance and administration occupations
- Occupations in social science, education, government service and religion

Out of interest in looking at the area as a regional economy where labour moves to and from communities on a daily basis, Township of Red Rock's labour force concentration is the highest in the three following occupations:

- Sales and Service (27.2%)
- Occupations unique to processing, manufacturing and utilities (23.5%)
- Occupations in social science, education, government service and religion (12.3%).

**Figure 7 – Employment by occupation**

Occupation figures for 2006	Employment Nipigon	Employment Red Rock	% Distrib - Nipigon	% Distrib - Red Rock
Management occupations	50	40	6.3%	9.9%
Business, finance and administration occupations	80	30	10.1%	7.4%
Natural and applied sciences and related occupations	20	0	2.5%	0.0%
Health occupations	40	20	5.0%	4.9%
Occupations in social science, education, government service and religion	70	45	8.8%	11.1%
Occupations in art, culture, recreation and sport	20	0	2.5%	0.0%
Sales and service occupations	190	110	23.9%	27.2%
Trades, transport and equipment operators and related occupations	150	50	18.9%	12.3%
Occupations unique to primary industry	20	15	2.5%	3.7%
Occupations unique to processing, manufacturing and utilities	150	95	18.9%	23.5%

Source: Statistics Canada

As a method of comparison, the project team has provided data on the Township's, Region's, and Province's occupational labour force. Figure 9 shows some interesting trends. From 2001 to 2006, the proportion of the Township's labour force in Social Science, Education, Government Service and Religion grew by 6.9%, whereas regionally it expanded by 1.3% and provincially at 0.8%. The proportion of the Township labour force in Management grew by 2.9%, whereas regionally and provincially it expanded by 1.7%. The 2001 statistic showing that 19% of the local labour force as participating in Art, Culture and Recreation sector also indicates an employment strength (0.9%), as the Regional and provincial growth averages are much lower at 0.1% and 0.2% respectively. Health occupations increased 0.6% compared to the regional growth of 1% and the provincial growth rate of 0.5%. Most occupations declined in employment between 2001 and 2006, which underlies the fact that Nipigon is experiencing some economic challenges.

**Figure 8 – Regional and Provincial Occupation Comparison**

## Nipigon, Thunder Bay, Ontario: Labour Force by Occupation 2001, 2006

	Nipigon		Thunder Bay		Ontario	
	2001	2006	2001	2006	2001	2006
Management	9.4%	6.9%	8.3%	7.7%	11.4%	10.3%
Business, Finance and Administration	10.8%	10.1%	14.5%	16.0%	18.3%	18.6%
Natural and Applied Sciences	3.4%	2.5%	4.7%	5.0%	7.1%	7.0%
Health	4.4%	5.0%	6.1%	7.1%	4.8%	5.3%
Social Science, Education, Government Service and Religion	2.5%	9.4%	8.6%	9.6%	7.6%	8.4%
Art, Culture, Recreation and Sport	1.0%	1.9%	2.0%	2.1%	2.9%	3.1%
Sales and Service	23.2%	23.9%	26.6%	26.7%	22.9%	23.5%
Trades, Transport and Equipment operators	20.7%	18.9%	19.4%	17.5%	14.1%	14.1%
Occupations Unique to Primary Industry	3.9%	2.5%	4.2%	4.0%	2.7%	2.6%
Occupations Unique to Processing, Manufacturing and Utilities	20.7%	18.9%	5.6%	4.2%	8.2%	7.2%

Source: Statistics Canada

Figure 10 shows a breakdown of employment by occupation between Nipigon and the Red Rock Indian Band. It is noticeable that Nipigon has larger proportions of workers within the specified occupations. Both Nipigon and Red Rock Indian Band have large proportions of employees in Sales and Service and Trades, Transport Equipment and Related Occupations.

**Figure 9 – Occupations between Red Rock Indian Band & Nipigon**

Occupation figures for 2006	Joint / Total	Nipigon Township / Total	Red Rock Indian Band / Total
Experience in sales and service occupations	230/920	190/790	40/130
Experience in trades, transport, equipment operators and related	190/920	150/790	40/130
Experience in Processing, manufacturing and utilities	150/920	150/790	0/130

Experience in Business Finance and Administration	85/920	75/790	10/130
Experience in management occupations	65/920	55/790	10/130

Source: Statistics Canada

## 2.5 Education

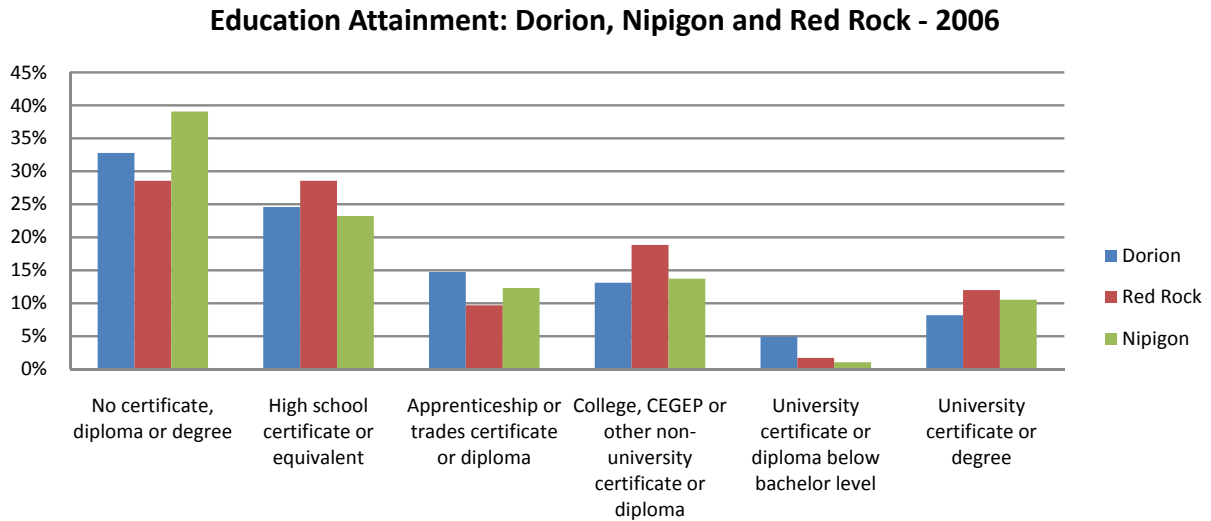
A community's human capital is an indicator of its growth potential because it speaks to the capacity for innovation and entrepreneurial activity. Human capital is defined as the accumulation of skills and talents which manifests itself in the educated and skilled workforce of a given region. For the Township of Nipigon, the proportion of its residents advancing their educational pursuits has implications for the growth of its economy and the attractiveness of its labour force to business attraction and investment.

Figures 11-14 indicate the current educational attainment levels for the population in Nipigon, Red Rock Indian Band and comparator communities. These statistics are based on the total population above the age of 20. Figure 12 results indicate that Nipigon has seen a modest increase in those completing high school education and post-secondary education; in 2001 about 7.3% of Nipigon's population had achieved a University bachelor degree or higher, while by 2006, 10.6% of the local population had achieved this educational level.

In addition, Nipigon has seen a significant increase in the number of residents graduating with a high school certificate: 23.2% in 2006 and 8.8% in 2001. The number of college diplomas has also gone up by 2.4%. Nipigon in comparison to Red Rock and Dorion has a relatively larger population and thus has more people within each education category. Among the three townships, Nipigon has a higher percentage of people with no certificate, diploma or degree, while Red Rock has a higher percentage of people with a high school certificate, college diploma or university degree. Finally, Dorion has a higher percentage of people in trades/apprenticeships or a university certificate or diploma below a bachelor's.

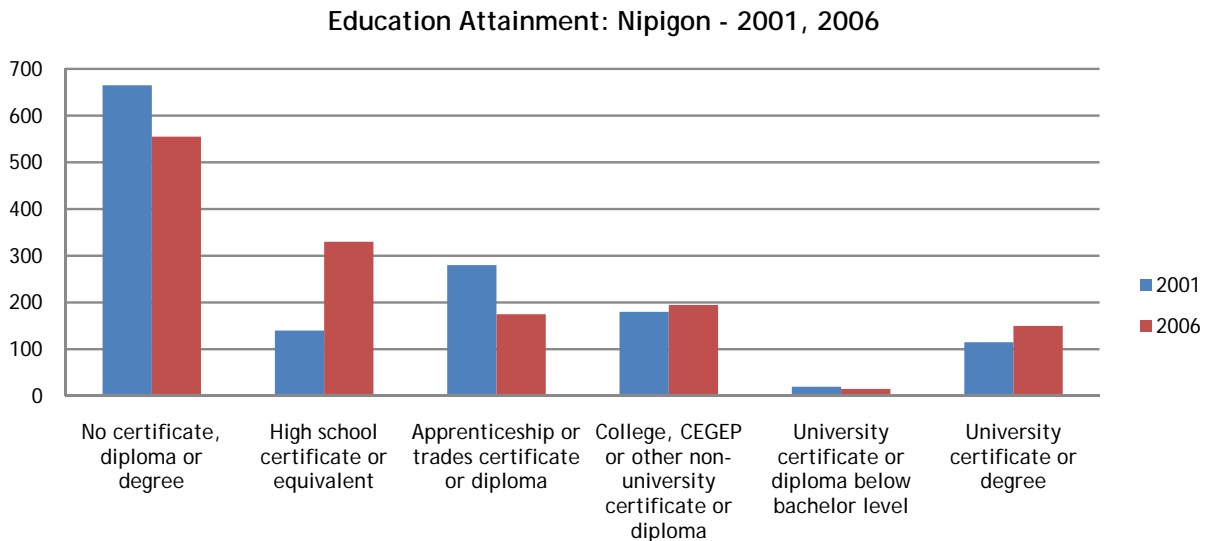
In 1996, the Red Rock Indian Band had a large proportion of its population with less than high school education. People with trades, apprenticeship and college education constituted a larger proportion than those with some post secondary or high school education. There were no people with Bachelor degrees in Red Rock during that year. Statistics on education attainment could not be obtained for 2001 and 2006. For this reason, it is difficult to come to any reasonable conclusion regarding the strength and opportunities the community can take advantage of – refer to Figure 13. Figure 14 shows that Nipigon has a higher proportion of its population with trades and apprenticeship certificates in comparison to Ontario and Thunder Bay District. This is also true for those who have high school or less than high school education. College and Bachelor certificates level education attainment is lower in Nipigon compared to Thunder Bay District and Ontario. This creates some challenges for attracting knowledge-based companies for economic growth.

**Figure 10 – Education attainment for Nipigon and comparator communities**



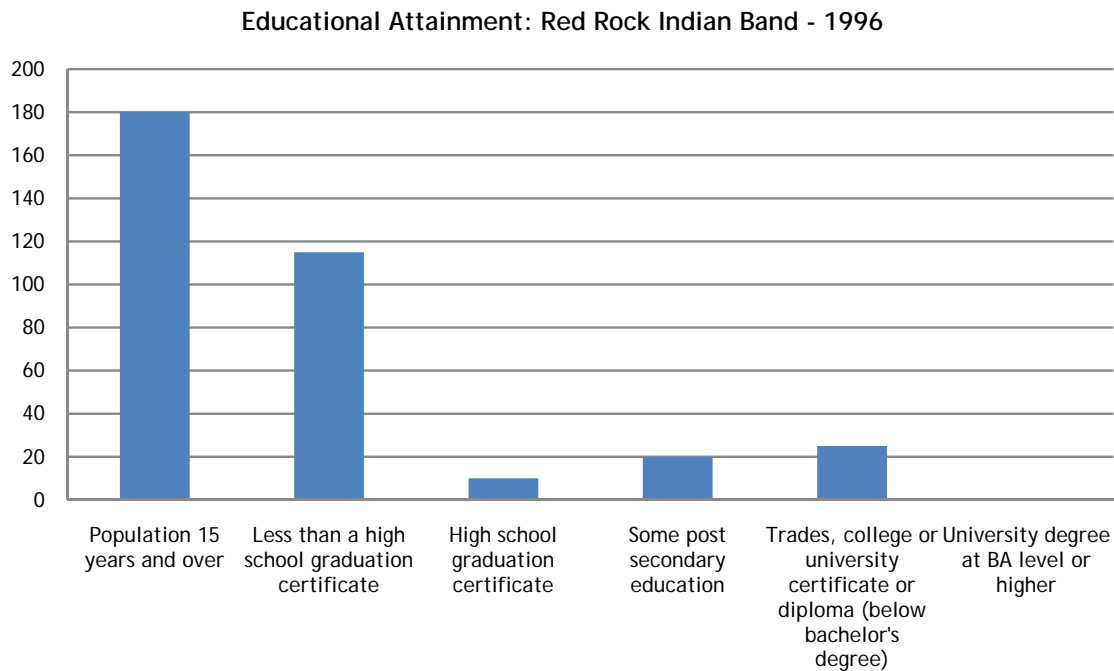
Source: Statistics Canada

**Figure 11 – Education Attainment for Nipigon**



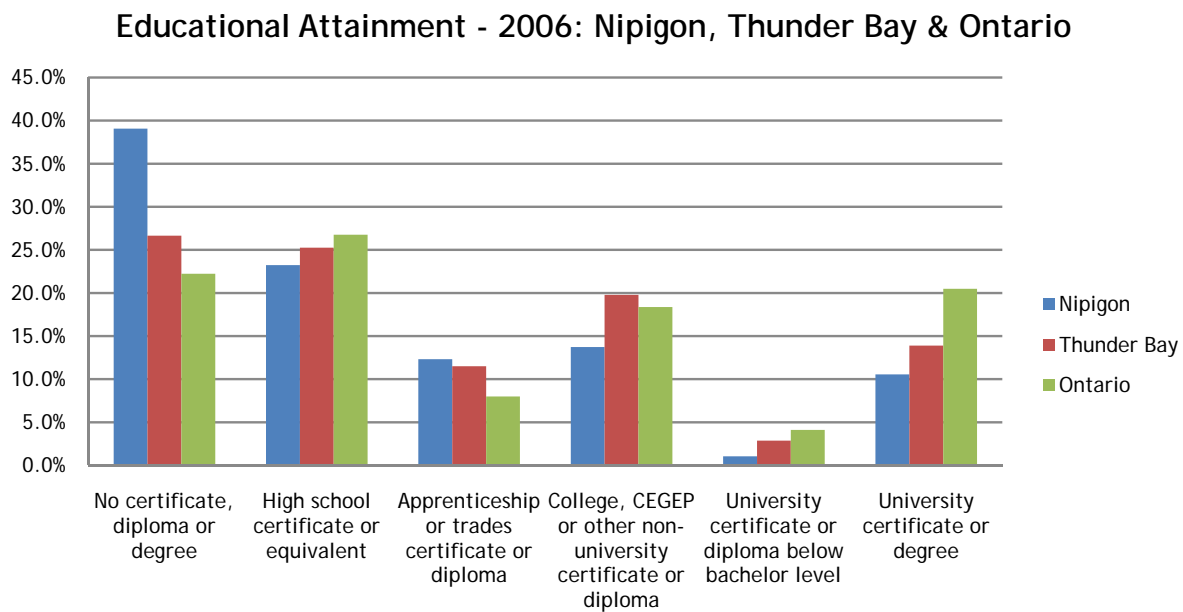
Source: Statistics Canada

**Figure 12 – Education Attainment for Red Rock Indian Band**



Source: Statistics Canada

**Figure 13 – Educational Attainment for Nipigon and Regional Communities**



Source: Statistics Canada

Figure #15 provides a breakdown of post-secondary educational attainment by primary field of study. These figures show the highest post-secondary qualifications that Nipigon residents above the age of 20 have received (as of 2006). The dominant fields of study are

- Architecture, engineering and related technologies (11%)
- Health, parks, recreation and fitness (5.7%)
- Social and behavioural sciences and law (4.2%).

The significant presence of professionals with education in these fields positions Nipigon for economic growth if it can enhance the value they create and seize entrepreneurial and business attraction opportunities.

**Figure 14 – Major field of study for Nipigon**

Major field of study - Classification of Instructional Programs (2006)	Total - Labour force activity	Distribution
No postsecondary certificate, diploma or degree	885	62.5%
Education	50	3.5%
Visual and performing arts, and communications technologies	0	0.0%
Humanities	0	0.0%
Social and behavioural sciences and law	60	4.2%
Business, management and public administration	50	3.5%
Physical and life sciences and technologies	0	0.0%
Mathematics, computer and information sciences	15	1.1%
Architecture, engineering, and related technologies	155	11.0%
Agriculture, natural resources and conservation	55	3.9%
Health, parks, recreation and fitness	80	5.7%
Personal, protective and transportation services	50	3.5%
Other fields of study	0	0.0%

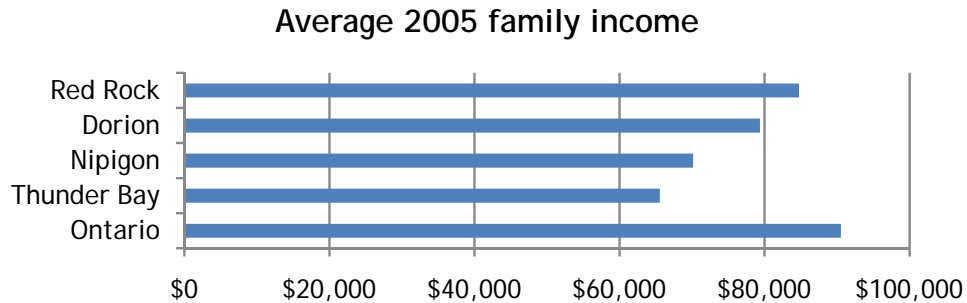
Source: Statistics Canada

## 2.6 Income

Average income rates provide important information about the wealth generated by the local population within a given community. High income rates in a region or township indicate that there may be a higher level of disposable income. In turn, these high income rates may spur local economic growth for businesses as the population can spend more of their income at those same businesses. Nipigon's average family income has declined by 3.6% from 2000 to 2005. Figure #16 provides an indication of current and historic household income levels at the city-wide, regional and provincial levels. According to

2005 data, the average household income in the Township of Nipigon in 2005 was \$70,152 compared to the District of Thunder Bay's average of \$65,174 and the Ontario average of \$90,526.

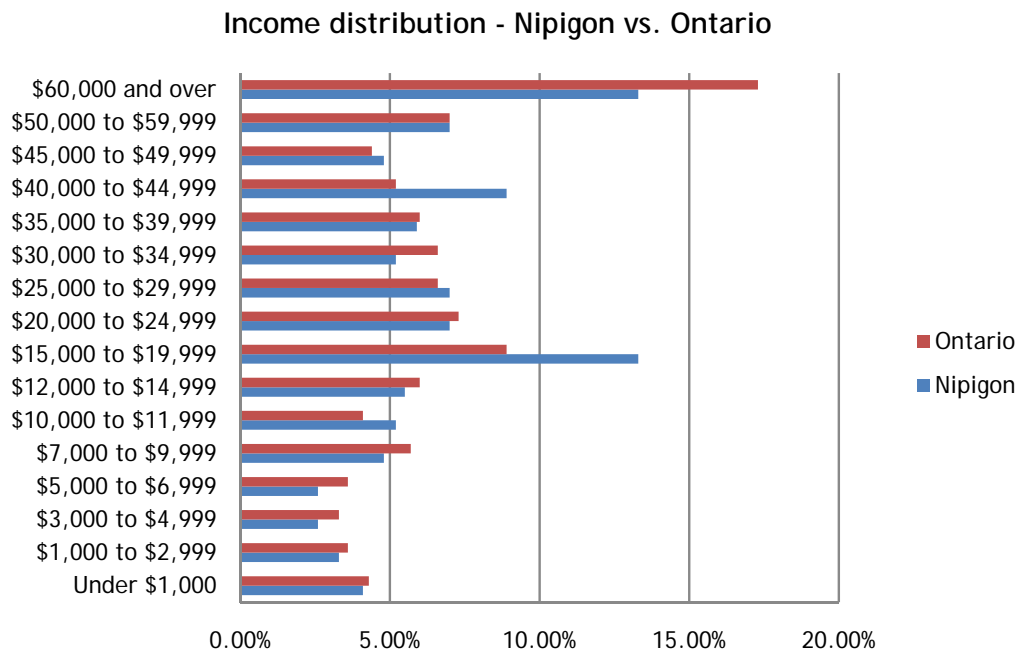
**Figure 15 – Average Family Income, 2005**



Source: Statistics Canada

Figure #17 indicates that the Township of Nipigon has a similar distribution of income compared to that of Ontario in 2005. The key differences are that Ontario has significantly more \$60,000+ salaries and Nipigon comes in with many more income earners in the \$40-50,000 and \$15-20,000 ranges.

**Figure 16 – Income Distribution, 2005**



Source: Statistics Canada

## 2.7 Location Quotient Analysis

In order to determine the level and degree of business and industrial specialization, and thus the economic diversity that may be occurring in the Township of Nipigon, location quotients (“LQ’s”) have been calculated to identify and measure the concentration of industry/business activity by major sector and sub-sector. **This data is not available for the Red Rock Indian Band.**

Location Quotients are a commonly used tool in regional economic analysis. They assess the concentration of economic activities within a smaller area relative to the overarching region in which it resides. For the purposes of this study the project team has calculated one set of location quotients that compare Waterloo’s industry sector concentration relative to the Province of Ontario.

A location quotient greater than 1.0 for a given sector indicates a local concentration of economic activity as compared to the overarching region (either Ontario or Region X). Location Quotients equal to 1.0 for a given sector suggest that the Township of Nipigon has the same concentration of economic activity as the overarching region. Finally, a location quotient of less than 1.0 indicates a concentration of economic activity that is less than the overarching region.

In theory, industrial or business concentration that is greater than the overarching region average may represent the export base of the participating municipalities. Businesses that make up this export base may have chosen to locate in the area due to certain regional competitive advantages. These competitive advantages can be used to attract further investment in the future, in the same or complimentary industries.

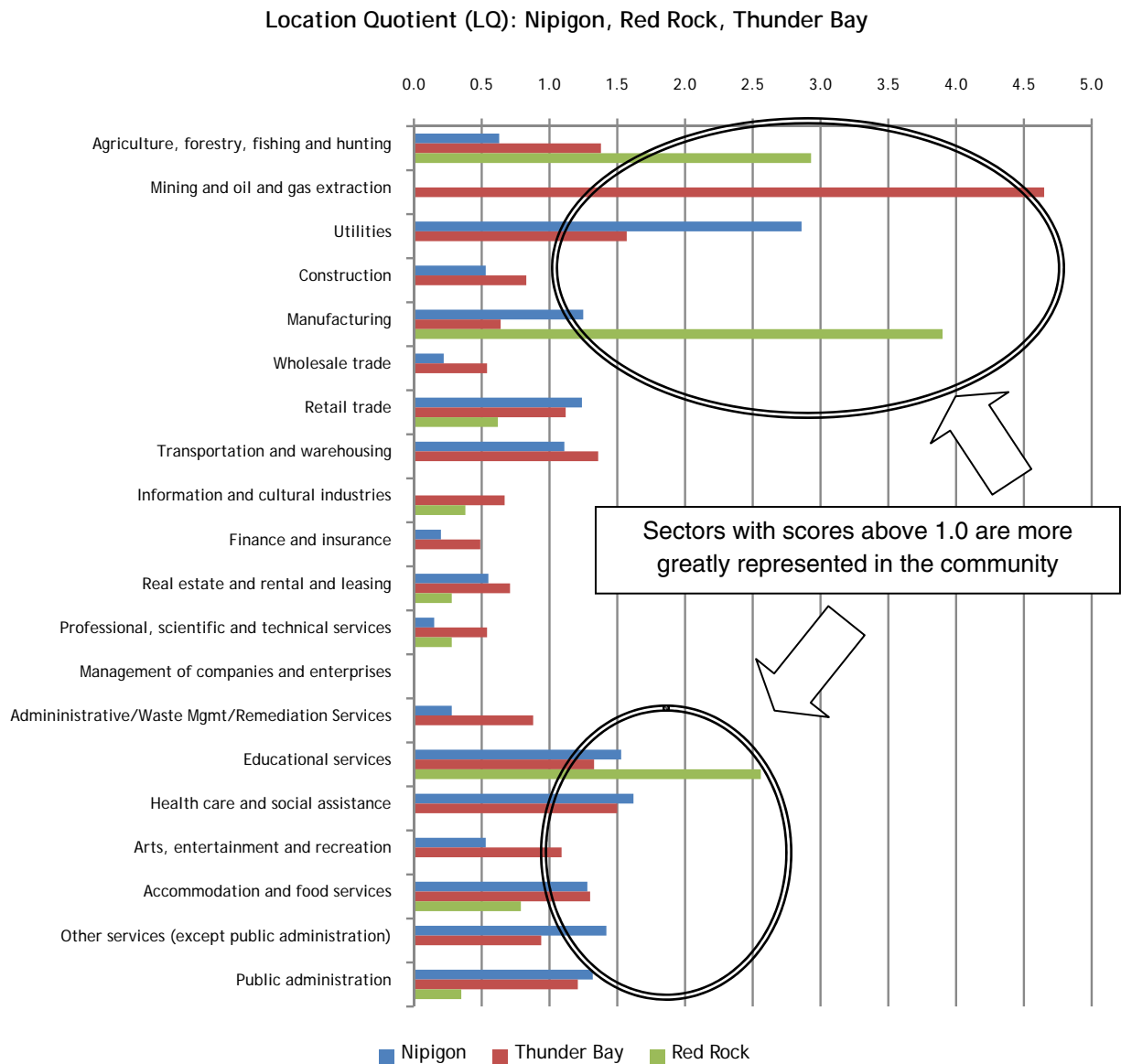
The following section provides the LQ results for the Township of Nipigon as compared to the Province of Ontario. Definitions for individual sectors are based on the North American Industrial Classification System (NAICS) and are provided in the Appendix to this report.

When compared to Ontario, the Township of Nipigon has a comparatively high concentration of local employment in:

- Utilities
- Healthcare and social assistance
- Educational services

Refer to Figure 18 for detailed calculations. The Township of Red Rock and City of Thunder Bay are provided for comparison purposes.

Figure 17 – Location Quotients for Industries, 2006



## 2.8 Sector specific analysis

### Nipigon

Nipigon experienced an employment decline of 14.5% from 2001 to 2006. In 2006, Nipigon had a number of dominant sectors that are major employers. These include Manufacturing (165), Retail trade (130) and Healthcare and social assistance (145). The greatest gains between this period occurred in the

following sectors: Educational services (60) with a high LQ of 1.53. The gains were specifically within elementary and secondary schools. The second is Health care and social assistance (15), which has an LQ of 1.62. Overall, Nipigon has relatively moderate diversity across its industries - however, in 2006 was dependent on the manufacturing and public administration sectors.

Manufacturing had a decline of 23% in 2006 from 2001, with most of the job decline attributed to local and industry factors<sup>1</sup>. This industry has a high LQ of 1.25, it is a challenging one with prospects limited by external trends and declining competitiveness. Veneer, plywood and engineered wood product manufacturing, a subsector with an extremely high LQ of 165 was the dominant sector within the industry with the majority of employees. This sector is also experiencing challenges. Sawmills and wood preservation has an LQ of 8.5 and it is an evolving sector with prospects somewhat limited by external trends.

Healthcare and social assistance had a growth of 11% in 2006 from 2001, with most of the job growth attributed to industry factors. This industry has a high LQ of 1.62; it is a promising one and should be a high priority retention target. Current strengths within this industry include outpatient care centres and individual and family service establishments, all of which have LQs around 4. The rest of these sectors are mostly evolving with prospects limited by external trends or a weak base.

Retail Trade had a decline of 35% in 2006 from 2001, with most of the job losses attributed to local factors. This industry has an average LQ of 1.24, and is a vulnerable one that is classified as a high priority retention target. The only current strength within this industry is health and personal care stores. The rest have prospects limited by external trends, weak base or declining competitiveness. In a general sense, Nipigon had employment losses in most sectors, suggesting that its local economy is going through a number of challenges.

Following are perspectives on other communities. They are interesting in that they identify what is happening in other economies that are affected by and affect Nipigon and Red Rock Indian Band.

### **Township of Red Rock**

The Township of Red Rock had a total industry employment decline rate of 24% from 2001 to 2006. Red Rock has a number of dominant sectors that are major employers of their local people. These include Manufacturing (275), Educational services (85) and Retail Trade (35). The greatest gains between this period occurred in the following sectors: Agriculture, forestry, fishing and hunting (25) with a high LQ of 2.93. The second is Accommodation and Food Services (25), which has a low LQ of 0.79. Educational Services (15) has a high LQ of 2.56. Overall, Red Rock has relatively moderate diversity across its industries - however, in 2006 they were somewhat specialized and dependent on the manufacturing sector.

Manufacturing had a decline of 37% in 2006 from 2001, with most of the job decline attributed to local factors. This industry has a high LQ of 3.9, it is challenging one with prospects limited by external trends

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<sup>1</sup> Industrial Factor/Effect: the number of local jobs lost or gained due to the influence of growth in the sector provincially.

Local Factor/Effect: the number of local jobs lost or gained due to local conditions.

and declining competitiveness. Pulp, paper and paperboard mills were a subsector with a very high LQ of 291 suggests that the industry was highly dependent on it for employment. This sector is also experiencing challenges. Sawmills and wood preservation has an LQ of 15.95 and it is also a subsector that is struggling due to declining competitiveness.

Educational services had a growth of 21% in 2006 from 2001, with most of the job growth attributed to local and industry factors. This industry has a high LQ of 2.56 and is a current strength that is driving the local economy. One contributing factor was the employment growth in elementary and secondary schools.

Retail Trade had a growth of 75% in 2006, with most of the job growth attributed to local factors. This industry has a low LQ of 0.6, which means it is relatively under-represented. It could be an emerging strength, but more recent declines in the employment base suggest there will be not much increase in the near future. The highest growth in this sector occurred in beer, wine and liquor stores which have a very high LQ of 22.19. Generally, Red Rock lost a significant number of jobs in its dominant industry - manufacturing. There were a few gains and losses on other industries that were not particularly significant.

## **Dorion**

Dorion had a growth rate of 6.4% in overall employment from 2001 to 2006. Dorion has a number of dominant industries that are major employers. These include Agriculture, forestry, fishing and hunting (50), Health care and social assistance (20) and Transportation and warehousing (15). The greatest gains between this period occurred in the following sectors: Accommodation and food services (35) with a high LQ of 3.21. Manufacturing, specifically the beverage manufacturing had an increase of 15 employees and has a very high LQ of 47. Information and cultural industries also increased by 10 employees and has a high LQ of 2.21. Overall, Dorion has relatively little diversity across its industries - rather, they seem to be specialized and dependent on the primary sector.

Agriculture, forestry, fishing and hunting had a decline of 41% in 2006 from 2001, with most of the job losses attributed to local factors. Although this industry has a very high LQ of 16.91, it was a challenging one with prospects limited by external trends and declining competitiveness. Logging, a subsector of this industry, has an LQ of 182, suggesting that Dorion is heavily dependent on it. This subsector also experienced challenges.

Transportation and warehousing had a growth of 50% in 2006 from 2001, with most of the job gains attributed to local factors. This industry has a high LQ of 2.24; it is evolving and seems to be a current strength for the local economy. School and employee bus transportation, a subsector of this industry, has a very high LQ of 36.

Health care and social assistance had a decline of 50% in 2006 from 2001, with most of the job losses attributed to local factors. This industry has a low LQ of 0.59, it was a modest one with prospects limited by a weak base and declining competitiveness. Both out-patient care centres and child day-care services lost all employees. Even as Dorion's economy shows a few gains in some subsectors, the overall picture shows that it continues to lose jobs in many key sectors due to a weak base and declining competitiveness.

## **Thunder Bay**

Thunder Bay had a total industry employment decline rate of 0.1% from 2001 to 2006. Thunder Bay has a number of dominant sectors that are major employers of their local people. These include Health care and social assistance (9,820), Retail Trade (8,500) and Manufacturing (6,160). The greatest gains between this period occurred in the following sectors: Arts, entertainment and recreation (25% from 1,180 in 2001) with an average LQ of 1.09 - an accelerating industry with current strengths in performing arts, gambling and other amusing and recreational establishments.

The second is Administrative/Waste Mgmt/Remediation Services (28% from 1,735 in 2001), which has an LQ of 0.88. Healthcare and social assistance grew (11% from 8,815 in 2001) and has a high LQ of 1.5. Overall, Thunder Bay has experienced relatively good growth within the service sector and some losses in manufacturing and the primary ones.

Manufacturing had a decline of 27% in 2006 from 2001, with most of the job decline attributed to industry factors. This industry has a low LQ of 0.68; it is a marginal industry with prospects limited by overall. The only current strength is Medical equipment and supplies manufacturing firms and an emerging strength in electrical equipment manufacturing. The rest of its constituent subsectors have limited prospects, limited by a weak base or external trends.

Administrative/Waste Mgmt/Remediation Services experienced growth of 28% in 2006 from 2001, with most of the job growth attributed to industry factors. This industry has a mid LQ of 0.88 and is an accelerating industry with current strengths in business support services and investigation and security services. The other subsectors within this industry category have their prospects limited by a weak base and declining competitiveness.

Healthcare and social assistance had a growth of 11% in 2006 from 2001, with most of the job growth attributed to industry factors. This industry has a high LQ of 1.5, and is a promising industry and a high priority retention target. Current strengths are offices of dentists, nursing and residential care facilities and individual and family services. The highest growth in this sector occurred in beer, wine and liquor stores which have a very high LQ of 22.19. Generally, Thunder Bay has some important subsectors in technology and life sciences as observed above that could potentially change the nature of their economy. Unlike others, it's not dependent on manufacturing but the health sector which has a promising future.

## **2.9 Canadian Business Patterns Data**

Statistics Canada's Canadian Business Patterns Data provides a record of business establishments by industry and size. Sources of information are updates from the Statistics Canada survey program and the Business Number registration source collected from the Canada Revenue Agency (CRA). The business data collected for Nipigon includes all local business which meets at least one of the three following criteria:

1. Have an employee workforce for which they submit payroll remittances to CRA; or
2. Have a minimum of \$30,000 in annual sales revenue; or

3. Are incorporated under a federal or provincial act and have filed a federal corporate income tax form within the past three years.

This data is not available for Red Rock Indian Band.

The Canadian Business Patterns Data records business counts by “Total”, “Indeterminate”, and “Subtotal” categories. The establishments in the “Indeterminate” category include the self-employed (i.e. those who do not maintain an employee payroll, but may have a workforce consisting of contracted workers, family members or business owners). A review of the results for the Township of Nipigon provides an understanding of the business growth or decline, the size of operation in terms of the number of employees and the historical performance of the sector over the period 2001-2006. This information, coupled with the LQ analysis will help to refine the sector opportunities for the Township of Nipigon.

There are three points outlined in this section that require consideration before conclusions are drawn:

- Industry sectors by employee range reveal the industry sectors that the Township is dependent on. It is widely known that a diverse range of industry sectors and firms sizes is critical to ensure economic flexibility during a downturn in any particular industry. Communities that depend on single industries or concentrate economic activity in a fewer sectors miss this important attribute.
- The columns for firms that belong to self-employed individuals identify entrepreneurs that exist within the area. Sectors with high numbers of entrepreneurs require unique assistance that will be identified within the strategic plan.
- Finally, the firms listed under the Subtotal column exclude establishments that include self-employed people. Thus they include those who maintain an employee payroll and work for local corporations etc. The firms that exist within these specified sectors also require a unique strategy that will be identified in the strategic plan.

The figures below summarize the key sectors that show varying levels of dominance within Nipigon and the comparator townships. A full detailed list of sectors and their respective firm sizes is made available within the appendices.

As outlined in Figure 19, the Township has a modest number of self-employed single person workers (indeterminate category (B)). The largest percentage in this self-employed group work in three sectors:

- Holding Companies
- Contract Logging

Figure 19 indicates the Township of Nipigon has a small concentration of large employers in: General (except Paediatric) Hospitals (200-499), Hardwood Veneer and Plywood Mills (100-199) and Gasoline Stations with Convenience Stores (50-99). As of 2006, there were 81 registered business establishments (exclusive of self-employed operations). These include Contract Logging, Motels and Offices for Physicians. The high proportion of establishments (65%) in manufacturing and retail represents challenges for this community since this type adds relatively lower value within the value chain. Compounding this challenge is the fact that profit margins on gasoline stations and convenience stores are low, especially with the rise in energy costs. Thus, these industries do not expand economic growth within the Township of Nipigon.

**Figure 18 – Business Patterns Data for Nipigon**

Nipigon Employee Size Range	Total (A)	Ind (B)	Sub (A - B)	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500 +
<b>113311 - Logging (except Contract)</b>	4	2	2	2	0	0	0	0	0	0	0
113312 - Contract Logging	11	4	7	4	1	2	0	0	0	0	0
<b>Subtotal</b>	<b>15</b>	<b>6</b>	<b>9</b>	<b>6</b>	<b>1</b>	<b>2</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
221112 - Fossil-Fuel Electric Power Generation	1	0	1	0	0	1	0	0	0	0	0
<b>221122 - Electric Power Distribution</b>	<b>1</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
221210 - Natural Gas Distribution	1	0	1	0	0	1	0	0	0	0	0
<b>Subtotal</b>	<b>3</b>	<b>0</b>	<b>3</b>	<b>0</b>	<b>0</b>	<b>3</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
321211 - Hardwood Veneer and Plywood Mills	1	0	1	0	0	0	0	0	1	0	0
445110 - Supermarkets and Other Grocery (except Convenience) Stores	1	0	1	0	0	0	1	0	0	0	0
446110 - Pharmacies and Drug Stores	1	0	1	0	0	1	0	0	0	0	0
<b>447110 - Gasoline Stations with Convenience Stores</b>	<b>2</b>	<b>0</b>	<b>2</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>0</b>
447190 - Other Gasoline Stations	2	1	1	0	0	0	1	0	0	0	0
452991 - Home and Auto Supplies Stores	1	0	1	0	0	1	0	0	0	0	0
<b>452999 - All Other Miscellaneous General Merchandise Stores</b>	<b>3</b>	<b>0</b>	<b>3</b>	<b>2</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Subtotal</b>	<b>8</b>	<b>1</b>	<b>7</b>	<b>2</b>	<b>1</b>	<b>2</b>	<b>1</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>0</b>
551113 - Holding Companies	5	4	1	0	0	1	0	0	0	0	0
<b>621110 - Offices of Physicians</b>	<b>6</b>	<b>1</b>	<b>5</b>	<b>4</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
622111 - General (except Paediatric) Hospitals	1	0	1	0	0	0	0	0	0	1	0
<b>Subtotal</b>	<b>7</b>	<b>1</b>	<b>6</b>	<b>4</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>0</b>
<b>721114 - Motels</b>	<b>7</b>	<b>0</b>	<b>7</b>	<b>7</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
722110 - Full-Service Restaurants	4	1	3	2	0	1	0	0	0	0	0
<b>Subtotal</b>	<b>30</b>	<b>7</b>	<b>23</b>	<b>15</b>	<b>2</b>	<b>4</b>	<b>1</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>0</b>
913910 - Other Local, Municipal and Regional Public Administration	1	0	1	0	0	0	1	0	0	0	0
914110 - Aboriginal Public Administration	2	0	2	1	0	0	1	0	0	0	0
<b>Subtotal</b>	<b>44</b>	<b>8</b>	<b>36</b>	<b>25</b>	<b>2</b>	<b>5</b>	<b>3</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Total</b>	<b>126</b>	<b>45</b>	<b>81</b>	<b>59</b>	<b>5</b>	<b>10</b>	<b>4</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>0</b>

Source: Canadian Business Patterns Data

Figure 20 indicates that Dorion has a concentration of employees in a small number of establishments. In reference to establishments that consists of the self employment, two sectors are dominant – Logging and Forest Products Trucking, Local. Dorion also has a number of establishments in sectors that exclude the self employed. These are: Logging, Construction, Transportation and Mining.

The largest businesses are Motion Picture and Video Exhibition (20-49), Logging (except Contract) (20-49). Others are in Contract Logging, School and Employee Bus Transportation and Family Planning Centres, have employees in the range (10-19). Similar to Nipigon, the logging industry seems be the

predominant industry. Due to the smaller size of their labour force, Dorion has small businesses dispersed across the primary sectors and traditional service sectors.

**Figure 19 – Business Patterns Data for Dorion**

Dorion Employee Size Range	Total	Ind (B)	Sub (A - B)	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500+
<b>Total</b>	<b>62</b>	<b>32</b>	<b>30</b>	<b>19</b>	<b>3</b>	<b>6</b>	<b>2</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
Family Planning Centres	1	0	1	0	0	1	0	0	0	0	0
School and Employee Bus Transportation	1	0	1	0	0	1	0	0	0	0	0
Motion Picture and Video Exhibition	1	0	1	0	0	0	1	0	0	0	0
Logging (except Contract)	8	5	3	2	0	0	1	0	0	0	0
Contract Logging	13	5	8	4	0	4	0	0	0	0	0
Floriculture Production	1	0	1	0	1	0	0	0	0	0	0
Full-Service Restaurants	1	0	1	0	1	0	0	0	0	0	0
Other Local, Municipal and Regional Public Administration	1	0	1	0	1	0	0	0	0	0	0
Construction, Transportation, Mining, and Forestry Machinery and Equipment Rental and Leasing	3	1	2	2	0	0	0	0	0	0	0

Source: Canadian Business Patterns Data

Figure 21 suggests that Red Rock similarly has a small size firms that consists of the self employed. These are businesses spread across various sub sectors such as Jewellery and Silverware Manufacturing, Live Theatre and Other Performing Arts.

Red Rock also has a number of establishments in sectors that exclude self employed people and these include Paperboard Mills and Hydro-Electric Power Generation etc. The largest businesses are Paperboard Mills (200-499) and Other Local, Municipal and Regional Public Administration (20-49). Similar to Nipigon, Red Rock has a dominant industry that employs a significant portion of their labour force. The dependence of the Township on single industries presents economic challenges if the overall industry experiences a downturn.

**Figure 20 – Business Patterns Data for Red Rock**

Red Rock Employee Size Range	Total (A)	Ind (B)	Sub (A-B)	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500 +
<b>Total</b>	<b>20</b>	<b>6</b>	<b>14</b>	<b>6</b>	<b>5</b>	<b>1</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>1</b>	<b>0</b>
Paperboard Mills	1	0	1	0	0	0	0	0	0	1	0
Other Local, Municipal and Regional Public Administration	1	0	1	0	0	0	1	0	0	0	0
Supermarkets and Other Grocery (except Convenience) Stores	1	0	1	0	1	0	0	0	0	0	0
Convenience Stores	1	0	1	0	1	0	0	0	0	0	0
All Other Miscellaneous General Merchandise Stores	1	0	1	0	1	0	0	0	0	0	0
Forest Products Trucking, Local	2	1	1	0	1	0	0	0	0	0	0
Services for the Elderly and Persons with Disabilities	1	0	1	0	0	1	0	0	0	0	0
Full-Service Restaurants	1	0	1	0	1	0	0	0	0	0	0

Source: Canadian Business Patterns Data

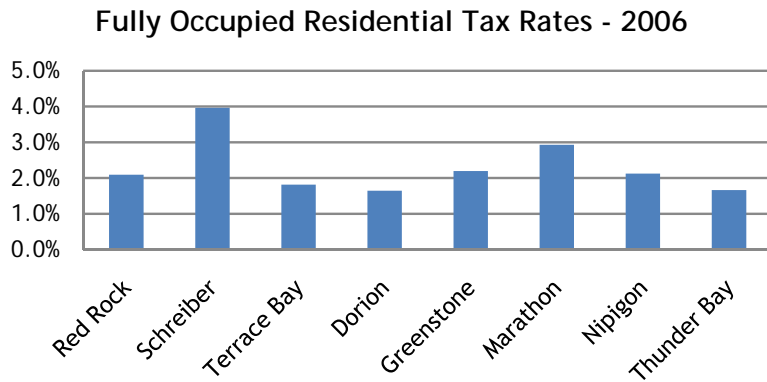
## 2.10 Construction Activity, Real Estate Availability & Tax Rates

The majority of construction activities in and around Nipigon are public projects. The highway is often being upgraded in the summers and there is a four-lane highway to Thunder Bay planned that could employ many locals. Nipigon is presently upgrading two sidewalks downtown. The Downtown Revitalization project is expected to increase the jobs in the township's construction sector. This project is estimated at \$3.8 million and the contractor retained by the township to complete the project is interested in hiring locally as much as possible. The Band is currently considering the redevelopment of a Lodge on the Nipigon River. Real Estate Information for the Red Rock Indian Band is currently unavailable.

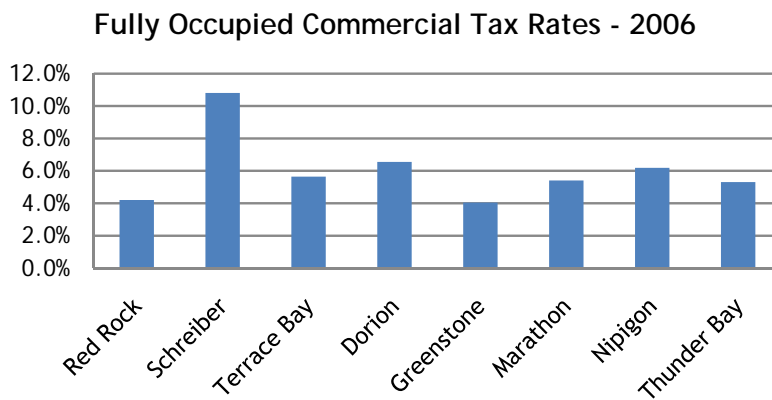
In terms of real estate availability, one property is listed on MLS. This property is selling for \$19,900 and was located near the Nipigon River Bridge, a short walk to downtown Nipigon. There were no commercial or industrial property listed on any of the other major Canadian real estate search engines. Nipigon, however, has a former Multiply Mill site, which is available as industrial land. The township owns several pieces of commercial property but a good percentage of sales are private and not listed online. The Township does not maintain a master list.

The following information is from Financial Information Return (FIR) that municipalities must complete on an annual basis. The selected communities are all in North Western Ontario – Thunder Bay in the west and Marathon in the east. And for each community, the rates for 2002 and 2006 is provided – refer to figures 22-24. **Tax Rates for the Red Rock Indian Band are only applicable to non-status residents. At the present time, this data is not available.**

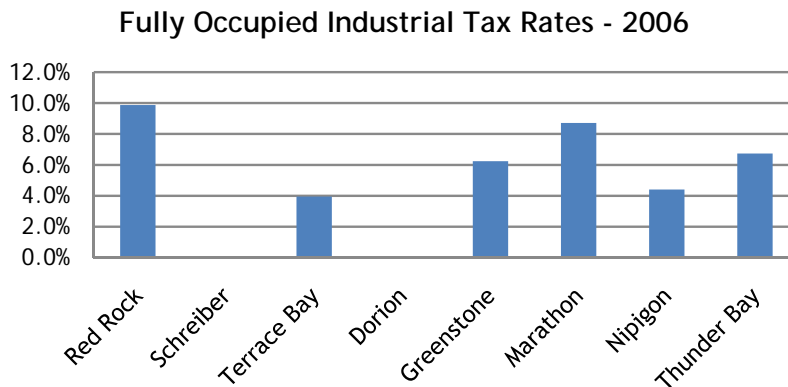
**Figure 21 – Residential Tax Rates**



**Figure 22 – Commercial Tax Rates**



**Figure 23 – Industrial Tax Rates**



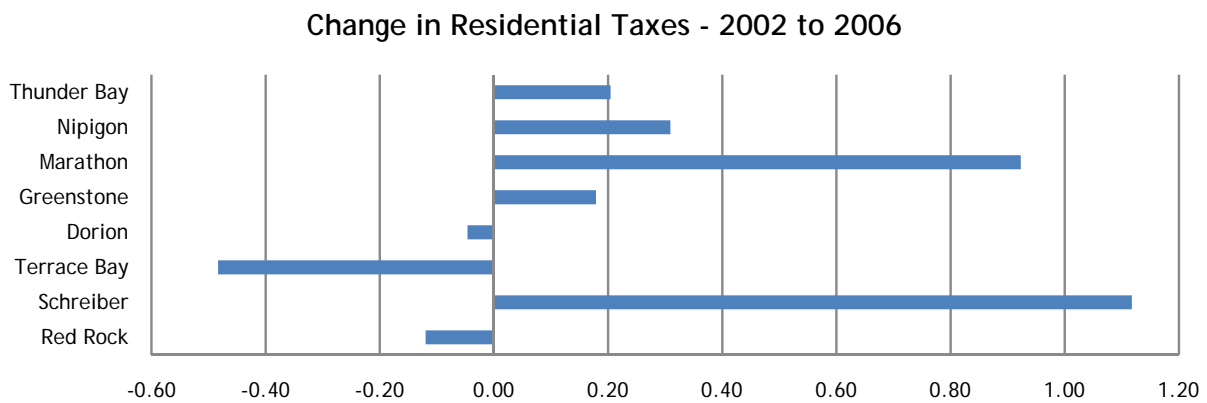
Tax rates have direct implications for a community in terms of its ability to attract business investors. Higher tax rates may lower real estate development and, ironically, shrink the overall tax base available for maintaining community facilities and services.

Figure 23 on Commercial taxes shows Nipigon above most communities in the region.

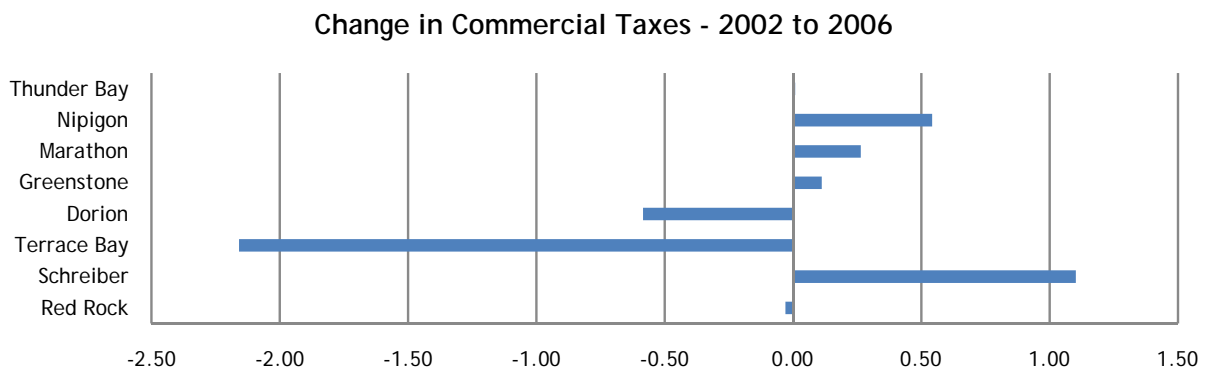
Figure 24, however, shows that Nipigon is below most communities in the region.

Figures 25 to 27 show the changes in tax rates between the period 2002 and 2006. Nipigon has increased its residential, commercial and industrial tax rate faster than those of the City of Thunder Bay. Red Rock decreased its residential and commercial tax rates between the same period. For Nipigon, residential tax rates seem to have experienced the highest change. Terrace Bay has decreased its tax rates significantly in all categories.

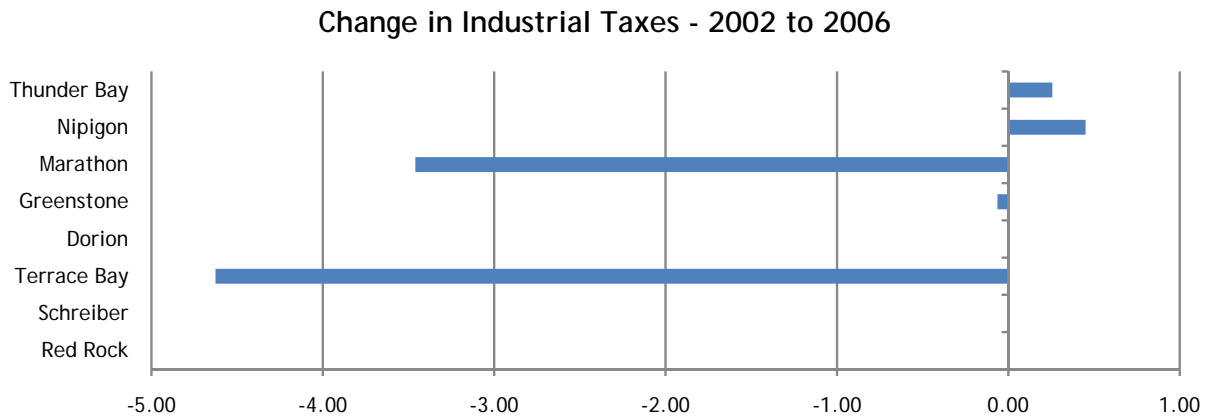
**Figure 24 – Change in Residential Tax Rates**



**Figure 25 - Change in Commercial Tax Rates**

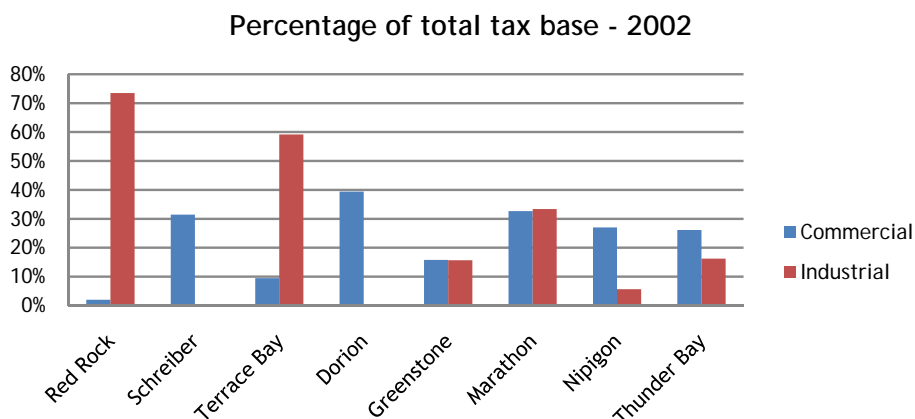


**Figure 26 – Change in Industrial Tax Rates**

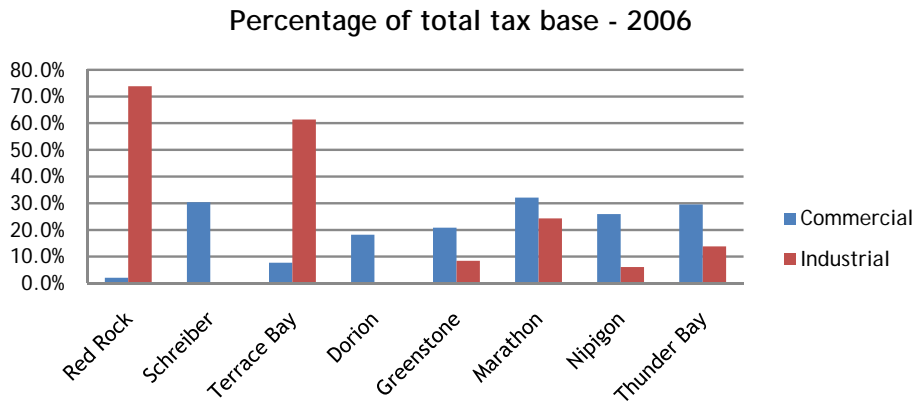


Figures 28-30 below show the distribution or share of commercial and industrial taxes for the selected location during 2002 and 2006. Nipigon has a greater share of its total tax base derived from commercial rather than industrial – this is similar to the City of Thunder Bay. By contrast, Red Rock gets most of its tax share from industrial rather than commercial. The change in percentage total shows a little increase for industrial tax share by Red Rock. Nipigon on the other hand, has increased the industrial share and decreased the commercial share from 2002 to 2006 – refer to Figure 30. The City of Thunder Bay by contrast increased the commercial share but decreased the industrial share of taxes during the same period.

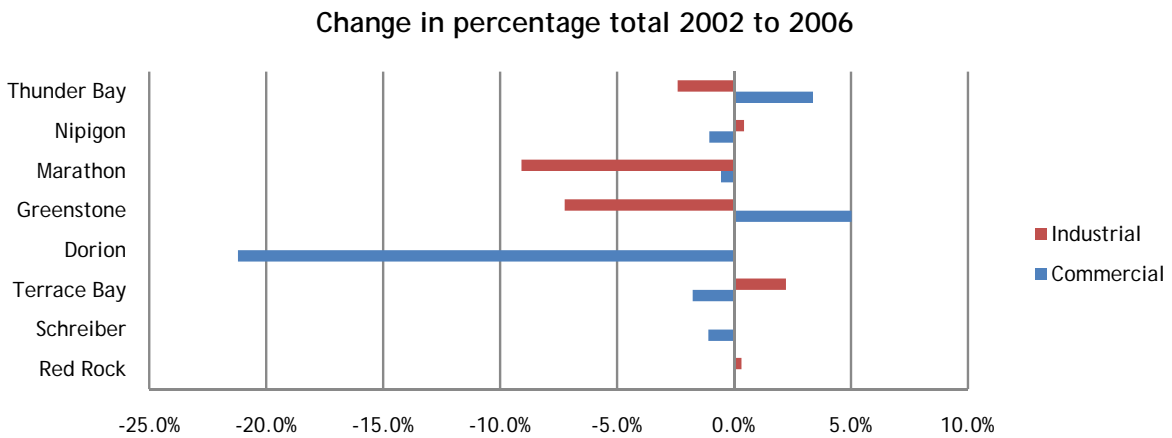
**Figure 27 – Percentage of Total Tax Base for 2002**



**Figure 28 – Percentage of Total Tax Base for 2006**



**Figure 29 – Change in percentage total from 2002 to 2006**



## 2.11 The Cultural Economy

The diversification strategy has a strong emphasis on the cultural economy, especially as it relates to the Red Rock Indian Band and Ojibwa traditions. This emphasis has been placed on the area by the Band itself with the intentions the community's leaders have for the recently purchased Chalet Lodge.

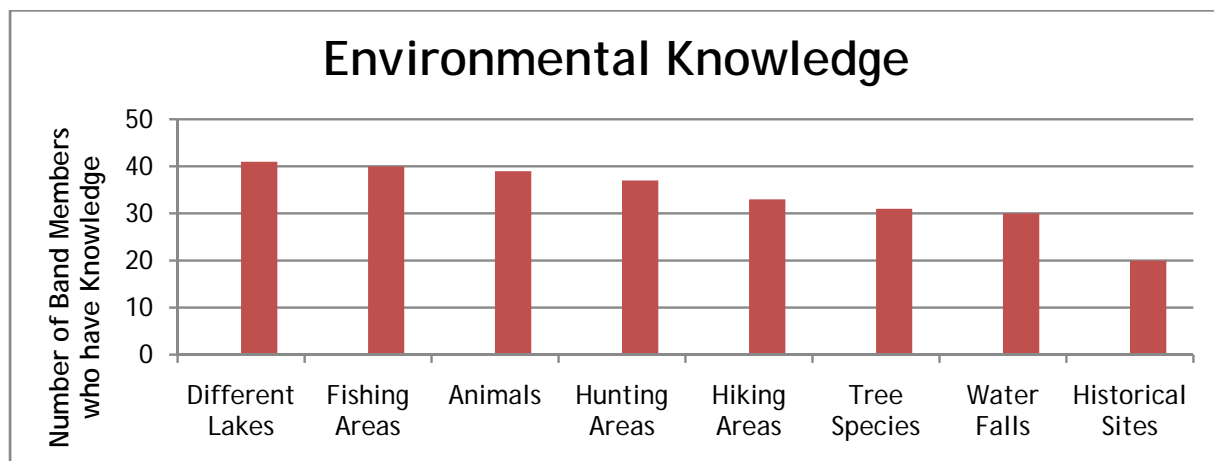
A Skills Inventory that was completed in 2008 provides excellent insight into the interests that members have in different aspects of traditional and modern culture. Particularly interesting for the development of this report are the questions around the use of these activities for economic gain and teaching of tourists.

The following figures are excerpted from the Inventory.

	Yes	Maybe	No
Have you ever passed on / taught your skills to others?	35		10
Are you willing to pass on your knowledge / skills to the youth / other members of the community?	34	2	11 – reasons for no included “too shy”, “too old” and “no time”
Would you be willing (for a fee) to teach your skills to interested tourists who come to the area?	35	1	11 – reasons for no included “too shy”, “too old” and “want a partnership”

	Full-Time	Part-Time	Depends	Casual
Would you be willing (for a fee) to teach your skills to interested tourists who come to the area? If yes, would you be interested in pursuing this on a full-time or part-time basis?	8	11	9	9

Figure 30 – Do you have knowledge of your local environment?



	<b>Yes</b>	<b>No</b>
Are there any of the above areas you feel should be off limits to Tourism Development?	6 River system (6); Native artefact sites: pictographs (2); Minimal ecological disturbance (2); Keep the land the same “natural” (2); Historical Church (1); Habitat (1)	18

	<b>Yes</b>	<b>No</b>
Would you be interested in being involved in the Tourism Industry, although you feel you do not have the necessary skills to do so?	32 Interests include guiding, cooking/custom service, promotion, advisory	11

	<b>Yes</b>	<b>Maybe</b>	<b>No</b>
Would you be interested in taking any training programs offered in order to become qualified to work within the Tourism Industry?	28	2	12
Would you consider developing a tourism business based on your traditional skills/hobbies?	18 Assistance needs include Funding opportunities (18); Business planning (16); Marketing (14); Customer service training (13)	1	16

### 3 Investment Attraction and Readiness

An important part of identifying appropriate strategic objectives and marketing directions is gaining an understanding of how ready the community is to deliver an investment program.

#### 3.1 Defining Investment Readiness

Investment readiness refers to the supply of a community’s assets and how prepared the community is to market them. Although a community may have many positive assets, as a first step, they should be presented consistently to the businesses that they want to attract.

In order to be “market ready”, all departments and relevant government groups including Council, must be prepared to deal with the expected market demand. Since little has been done to outwardly market these communities in the past (without being critical of the past), it is natural to suggest that there may need to be a more responsive mechanism to cope with potential new growth.

This level of need is evaluated as part of a self-assessment test that assists communities to identify investment readiness gaps, determine the effectiveness of existing planning and economic development processes and identify ways to add value to those processes.

#### 3.2 Investment Readiness Test

The Investment Readiness Test that is used in this strategy is comprised of seven sections that represent key considerations for investors. These are: community profile, industrial and commercial land inventory, investment marketing, land use planning, economic development, dealing with site selectors and monitoring investment inquiries.

A determination of each community’s readiness follows. The model that is utilized is extracted from the Ontario Ministry of Northern Development and Mines’ Investment Readiness Test. It is a very comprehensive checklist of the factors that communities should consider in order to be prepared to undertake a proactive investment attraction strategy.

##### 3.2.1 Community Profile

	Nipigon	Red Rock Indian Band
1. Does your community maintain a community profile?	Yes	Yes
2. If yes, does the profile include:	No	No
<ul style="list-style-type: none"> <li>your community’s vision statement;</li> </ul>		
<ul style="list-style-type: none"> <li>the name, address, phone number and email address of a local economic development professional who can be contacted by potential investors;</li> </ul>	Yes	Yes
<ul style="list-style-type: none"> <li>a demographic profile by gender and age;</li> </ul>	Yes	Yes

• a list of education institutions and training facilities;	Yes	Yes
• a labour force profile, including a summary of wage rates by occupation and specific skills such as bilingual capacity;	No	No
• education attainment levels;	No	No
• a list of major private and public sector employers;	Yes	No
• a summary of the local industrial, commercial and residential real estate markets, including the cost of building permits per square foot;	No	No
• information or contacts regarding the local, provincial and federal tax systems;	Yes/No	Yes/No
• a list of local industrial parks, including information on cost per hectare/acre and available services;	Yes (building) No (property)	No
• a summary of local industrial realty taxes, sewage and water capacities, waste disposal facilities, gas and electrical rates;	Yes	No
• a summary of police and fire protection services;	Yes	Yes
• a list of local financial institutions;	Yes	No
• an inventory of existing businesses in your community along with number of employees;	No	No
• information on local and regional transportation networks (e.g. airports, highways, railways, intermodal, ports, etc.);	No	No
• an overview of telecommunications services and infrastructure;	No	No
• a chart indicating distances to major urban markets and border crossings in both kilometres and miles;	No	No
• a list of local business groups (e.g. chambers of commerce, aboriginal business organizations, etc.);	Yes	Yes
• a summary of local research and development initiatives;	No	No
• growth projections and initiatives related to upgrading existing power, water, sewer, road and other hard services;	No	No
• an overview of economic development strategies and services;	No	No
• testimonials from local business leaders (success stories);	No	No
• a summary of recent private and public sector investments;	No	No

• cost of living data;	No	No
• a list of local and regional health care facilities, as well as access to telemedicine services; and	Yes	No
• an overview of quality of life, including a summary of climate, cultural, recreational, and entertainment attractions, and retail services?	No	No
3. Is the profile reviewed and updated regularly (e.g. every 2-3 months)?	No	No
4. Is the community profile available on an active website?	Yes	Yes

Observations:

- The level of detailed information within the community profile needs to be comprehensive enough to give a good overview of the community assets
- The website information is very limited in the same way and is not organized in a logical manner that allows users to profile the community expediently.
- It seems as though the information on the website is not updated regularly.

### 3.2.2 Industrial and Commercial Land Inventory

	Nipigon	Red Rock Indian Band
1. Does your community maintain an inventory of available industrial and commercial properties?	Yes/No	No
• Does the community have a web-based Geographic Information System?	No	No
2. Is the inventory in digital format (e.g. electronic database)?	No	No
3. Is the inventory maintained in partnership with local real estate brokers?	No	No
4. Does the inventory include both publicly and privately owned properties?	Yes	No
5. Does the inventory provide the following site information for each property:	Yes	No
• allowable uses;	No	No
• lease or purchase price;	No	No
• location;	Yes	No
• size, indicating minimum and maximum land available;	Yes	No
• zoning (type and category);	Yes	No

• taxes;	No	No
• electricity provider and capacity;	No	No
• water and sewer provider (municipal/private) and main size in cm/inches;	No	No
• gas provider, size of main in inches, and pressure in pounds per square cm/inch;	No	No
• information regarding site contamination;	No	No
• telecommunications provider and related information (e.g. availability of fibre optics and digital switching);	No	No
• access to transportation networks (i.e. highways, railways, commercial and general airports, and ports);	Yes	No
• owner or contact names as well as;	No	No
• contact names for the community's planning and building officials?	No	No
6. When a property has an existing building, does the inventory provide the following information:	Yes	No
• total square feet/meters;	No	No
• dimensions in feet/meters;	No	No
• ceiling height in feet/meters;	No	No
• general condition (e.g. excellent, poor, etc.);	No	No
• record of site condition (e.g. contamination);	No	No
• age;	No	No
• number of stories;	No	No
• number of truck docks and drive-in doors;	No	No
• floor, wall and roof type;	No	No
• heating costs; and	No	No
• other features (e.g. sprinkler system, crane, parking, etc.)?	No	No
7. Does the inventory include maps or pictures for added visualization?	Yes	No
• Is the information available on the community website?	No	No

Observations:

- Having an up-to-date available property inventory is a key aspect to being investment ready. If it is not the potential investor's first subject of inquiry it certainly is almost always in the top three.

- Communities can play an important role in terms of providing potential investors with property listings. While not intended to by-pass the work of the local realty community, it is very ineffective to, upon first contact, simply provide a potential investor with a list of brokers and property owners to call. A well-organized, comprehensive and accurate database of property information that is being sold/leased by the municipality or listed privately and through brokerage channels will entice the prospective investor to look further.
- There is no availability of real estate information at the local or regional level.

### 3.2.3 Investment Marketing

	Nipigon	Red Rock Indian Band
1. Has your community established, or is it part of, an investment marketing team?	Yes	Yes
2. Has your community prepared an investment/marketing plan that identifies goals and target markets/ industries? Is the community investment/marketing plan incorporated in the community's strategic plan?	In process	In process
3. Do community representatives participate in trade shows/missions?	No	No
4. Does your community advertise local economic development opportunities in domestic/international trade magazines and journals?	No	No
5. Do representatives from your community maintain regular contact with local, regional and national media representatives?	No	No
6. Does your community maintain a business newsletter?	No	No
7. Does your community maintain a Web site with links to other related sites?	Yes	Yes
8. Is the information included in your community profile posted on your Web site?	Some	Some
9. Is your community profile downloadable from your Web site in a single package?	No	No
10. Does your community use the services offered by the Ontario Investment Service to market itself on the Internet?	No	No
11. Does your community use the Sites Ontario Web service to market available industrial and commercial properties?	No	No

#### Observations:

- While some of the techniques identified above are largely dependent on the selected target markets it does clearly show there is currently very little outward promotion of the area.
- With the completion of this strategy, the communities will have accomplished an important element of investment readiness. The next step will be to implement the marketing action plan as described later in this document.

### 3.2.4 Land Use Planning

	Nipigon	Red Rock Indian Band
1. Are your community's official plan and zoning by-laws current and do they reflect your goals and objectives for today and the future?	Yes	No
• Are the community's official plan and zoning information available on the community website?	No	n/a
2. Are the policies and designations in your community's official plan general enough to accommodate most development proposals without the need for plan amendments?	Yes	n/a
3. Does your official plan include a strategy for economic development?	No	n/a
4. Are the definitions/provisions in your zoning by-laws easy to understand?	Yes	n/a
5. Does your community have an effective information system that provides official plan and zoning information in an easy-to-read format (e.g. documents, aerial photos, maps, neighbourhood charts, etc.)?	No	n/a
• Does a web-enabled GIS system fit into the land use planning function?	No	n/a
6. Does your community have a flow chart outlining the steps in the land use planning and development approvals process?	No	n/a
7. Does your community have information on how long it takes for a typical planning or development application/proposal in your community to be approved?	No	n/a
8. Do you have information on application fees and other associated charges (e.g. sewer hook-ups) imposed on applicants/ developers in your community?	Yes	Yes
9. In cases where planning and development approvals are not administered in your community, are you aware of who is responsible for planning and who are the immediate contacts?	Yes	Yes
10. If an applicant/developer needs information or advice on any aspect of their planning or development proposal, do you know to which community department or ministry to refer them?	Yes	Yes
11. Are you aware of the environmental regulations that may affect investors considering your community?	Yes	Yes

#### Observations:

- Zoning By-laws and Official Plans are in place for Nipigon and they have the very basic elements of good land use planning in place. However, there has been little effort made to make this “investor-friendly”. This includes:
  - readily available information such as the development approvals process,
  - maps, charts and digital images of available properties, and

- cost of utilities.
- Almost no land use planning information is available on the Internet. It is not currently possible to download excerpts of the Zoning By-law or Official Plan.

### 3.2.5 Economic Development

	Nipigon	Red Rock Indian Band
1. Does your community have a formal strategic plan for economic development?	In progress	In progress
2. If yes, has it been reviewed or updated in the past three years?	n/a	n/a
3. Has your community established an economic development committee, office or organization?	Yes	Yes
4. If yes, does the committee or organization include representation from the private sector?	Yes	No
5. Does your community maintain a list of key contacts in both the private and public sectors who can provide advisory and technical assistance in key areas (e.g. forestry mining, real estate, telecommunications, trade agreement, taxes, etc.)?	Yes	Yes
6. Does your community have a designated contact for economic development related matters?	Yes	Yes
7. If yes, is your contact person for economic development familiar with the planning and development approval processes in your community?	In training	In training
8. Does your community have an office/staff to create a one-window development process?	No	No
• Is economic development information available on the community website?	Somewhat	Somewhat
9. Have you established a professional relationship with your Small Business Self-Help Office or Enterprise Centre?	Yes (CFDC) / No (SBE)	Yes (CFDC) / No (SBE)
• Have you included them in your economic development efforts?	Yes/No	Yes/No
10. Is your community aware of existing federal and provincial economic development policies, programs and services?	Yes	Yes
11. Does your community maintain a list of local business leaders to whom site selectors can be confidentially referred for testimonials about the community?	No	No
12. Does your municipality liaise with the local chamber of commerce or local	Yes	Yes

business groups regarding economic development matters?		
13. Does your community work co-operatively with neighbouring communities to pool resources and information on economic development?	Yes	Yes
14. Does your community jointly fund economic development initiatives/programs with private sector companies and other levels of government?	No	No
15. Do your community leaders support development initiatives?	Yes	Yes
16. Are you aware of the businesses or individuals who have left your community but may be interested in returning or investing locally?	No	No

Observations:

- There is a strong interest in seeing economic growth within both staff and political levels of the governments. Most officials would like to do more, but financial resources are tight.
- There is a wonderful sense of partnership between the two communities, but there is difficulty in extending that goodwill further. Nipigon and Red Rock Indian Band have successfully worked together on a few projects in their early stages of partnership.
- Websites include direct contact information for the person who is responsible for dealing with investment inquiries, however, the Nipigon website is generally much more advanced than that of Red Rock Indian Band.

### 3.2.6 Dealing with Site Selectors

	Nipigon	Red Rock Indian Band
1. Does your community have a staff person or team identified as the primary contact for site selectors?	Yes	Yes
2. If yes, is your contact familiar with the site selection process for new companies?	Yes/No	Yes/No
<ul style="list-style-type: none"> <li>• Does the community have a set of procedures for dealing with site selectors?</li> </ul>	No	No
3. Can your contact respond quickly and appropriately to development queries (e.g. unionization, financial incentives, special requirements, etc.)?	Yes/No	Yes/No
4. Is your contact aware of the site selection requirements of your community's specific target industries?	Yes/No	Yes/No
5. Is your contact familiar with appropriate protocols for dealing with site selectors?	Yes/No	Yes/No

Observations:

- Staff at the two offices are generally aware of their responsibilities when dealing with site selectors but lack experience in dealing with these inquiries. There is a support team in place of Councillors and other representatives who will aid when needed.

### 3.2.7 Monitoring Investment Inquiries

	Nipigon	Red Rock Indian Band
1. Are you aware of investment going elsewhere as a result of your community's failure to meet the needs of the investor?	Yes	Yes
2. Does your community monitor investment attraction (e.g. track missed opportunities) and work to improve the way in which it deals with potential investors?	No	No

Observations:

- There is no awareness because prospects are not aggressively tracked after initial contact unless the prospect does his/her own follow-up.

### 3.3 Providing Top-Notch Service

One element of Investment Readiness that the above tables do not address is the degree of speed at which site selection processes move – especially at the front end. Despite the fact that relocations and expansions of businesses normally take a minimum of three months and sometimes several years, a community's inability to respond quickly to the initial questions can leave it out of the running. Similarly, as the process moves along and the information that prospective investors require becomes more complex and detailed the inability for a community to respond quickly and accurately will result in a lost client.

Economic development is a service business and investment prospects require a high-degree of attention. To effectively determine the client's needs and identify possible solutions takes strong selling skills and a broad knowledge of the local and regional economy, the business sectors that are being targeted, building/land development and happenings within the local business community.

Interaction with the prospect may begin with a single staff person, but as the project develops it is normal for many different municipal departments and outside organizations to be involved. There needs to be a standard operating procedure and single point of contact, but the township's point person must have the ability and capability of accessing information from many sources. To be consistently successful in attracting new business, the two communities and other local organizations must be recognized as one team who are working towards the common goal of doing whatever it can to attract desirable investments. The Investment Readiness Checklist shows that the communities have basic elements in place but are not currently really well-equipped to handle advanced development inquiries.

The chart below shows the evolution of economic development services from the 1990s to current times. It is noticeable the standard of services, over just 10 years, has changed dramatically in terms of the value being offered.

## Evolution of Economic Development Services

Year	The Gold Standard Response Time	The Gold Standard of Economic Development Service
<b>1996</b>	48 hours	At the end of the call with the investment prospect the EDO says: “To help you better understand our community and the opportunities we have for you, I will put together a package that contains our Community Profile, Available Properties Guide and Lure Brochure. I will use Post-It Notes to highlight the pages that will be of most interest so you can quickly find the relevant information. I will courier that out to you tomorrow and you should have it in 48 hours.”
<b>2001</b>	Same day	At the end of the call with the investment prospect the EDO says “To help you better understand our community and the opportunities we have for you, I will send you an email before the end of the day that has several attachments including key excerpts from our Community Profile as well as hyperlinks to online listings of available property that closely meets your criteria.”
<b>2006</b>	While on the phone	<u>During</u> the call with the investment prospect, the EDO says “Do you have access to the Internet right now?” [YES] “Great, why don’t we go online and I’ll take you through our website so that you can download the relevant files. We’ll also go through our available properties directory and look at maps, photos and details of available properties which meet the criteria you’ve described to me.”

Source: Millier Dickinson Blais (2007)

It is clear from the chart that overnight responses are no longer good enough. Communities must become more sophisticated in gathering/organizing community data and responding immediately to specific questions.

Whether it is for a 500 or 5 employee business, investment attraction is a competitive environment and communities that can go above and beyond the norm of customer service will have a much better chance of securing investment. For Nipigon and Red Rock Indian Band it is particularly important to “bend over backwards” for owners of small businesses who often look to open in small communities because of the economic opportunity, but also look for a community that understands their situation.

This approach to customer service will have an important spin-off for retention and service to businesses that are already in the community. A community that finds itself providing excellent service to prospective businesses will find that its relationship with the existing business community will improve too.

## 4 Guiding Principles for Employment Growth & Diversification

### 4.1 Guiding Principle #1: Diversification is the Right Way to Go

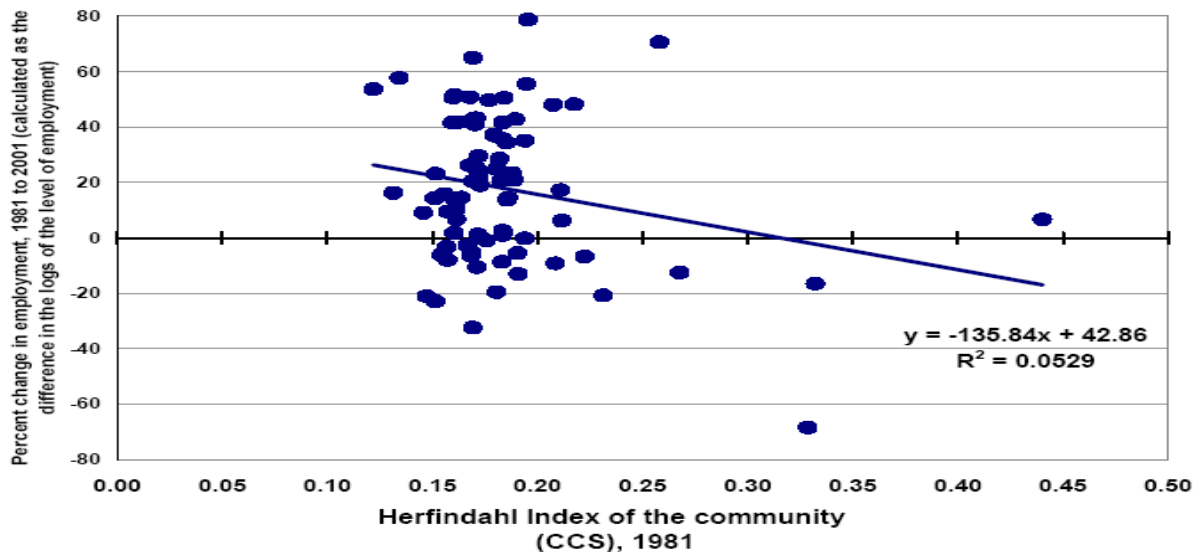
In a 2006 study *Northern Ontario's Communities: Economic Diversification, Specialization and Growth*, Statistics Canada researchers Ray Bollman, Roland Beshiri and Verna Mitura aimed to answer the following question: **If a community's economy diversified, did its employment grow?**

Their answer:

- Between 1981 to 2001 period, amongst the 26 communities that economically diversified, twice as many experienced employment growth than experienced a decline in employment (18 grew and 8 declined). Thus, if a community economically diversified, the odds were approximately two to one that the community's employment would also grow.
- Those communities that became more specialized had much greater swings in economic health. During "the good times" these communities were more likely to experience larger increases in employment, however, during "the bad times" employment changes took the community in exactly the opposite direction.

The following figure plots communities (the dots) on a graph that shows the more specialized a community's economy (a higher Herfindahl Index on the bottom axis), the less likely they were to have employment increases between 1981 and 2001 (as identified on the left axis).

**Figure 31 – Correlation between employment growth and diversification**

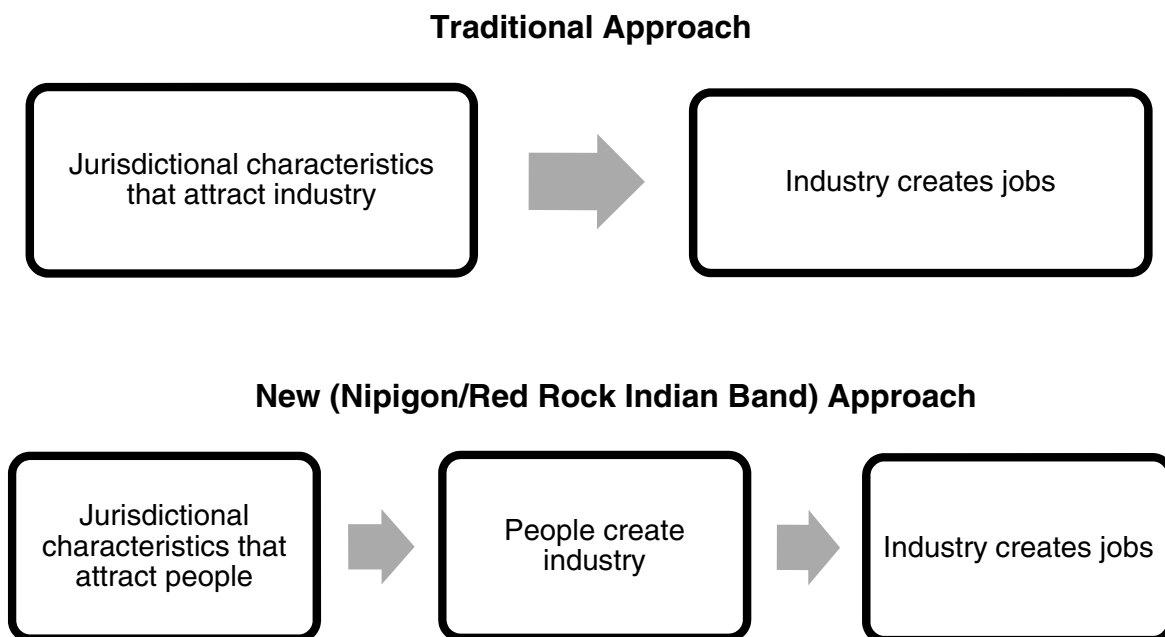


Source: Statistics Canada, Census of population, 1981 to 2001.

## 4.2 Guiding Principle #2: Economic Growth by Attracting People, Not Businesses

Richard Florida, in his book, 'The Rise of the Creative Class', projects that the future is trending towards economies in the developed world that can be located *anywhere* in a global sense. *Where* businesses choose to locate is becoming less a function of the traditional economic drivers such as jurisdictional cost (e.g. taxes), the supply of serviced industrial land, a ready supply of unskilled or semi-skilled labour, proximity to markets and transportation and much more a function of where *people choose to live*, which is governed by factors such as health and education facilities, access to the outdoors, environmental cleanliness, cultural facilities, etc. In other words, industry will not come to communities so much because of the availability of the basics of doing business (which of course must be present but frankly do little these days to distinguish one community from another), and more for the quality of life factors that uniquely differentiate places. This is shown in the diagram below which compares the traditional approach with the new approach.

Figure 32 – Approaches to Attract Economic Growth



Fully half of the wealth in Canada is in the hands of the 50+ age group, the so-called 'Baby Boomers'. Many of these are skilled and well-educated people who are seeking a different living format; some wish to retire early but many are looking for second careers, often very different than which created their wealth in the first place. Florida contends that the preferred environment for such people is more rural, but not in an isolated environment. Instead they are seeking a creative and vibrant milieu in a less structured frenetic format than exists in the major urban centres – a good opportunity for Nipigon and Red Rock Indian Band.

Creative centres do not thrive solely because of traditional economic reasons such as access to raw materials, transportation routes and a general labour force. These centres thrive because *people want to live there*. The newer economies require creative people who, in turn, require a creative environment. In order to attract and retain these people, companies must be located within this creative milieu.

### 4.3 Guiding Principle #3: Creating Jobs for Residents

A high priority for the initiatives contained within this report is to create jobs for local residents. As described, there is a high level of unemployment due to the downturn in the forestry sector and for the overall stabilization of the economy and housing market, it is important to retain as many residents as possible. The most effective way to do that is to create jobs for them.

According to the Labour Adjustment Centre in Nipigon, there is a wide range of skill sets and capabilities amongst the former employees of the two mills. The skills range from people with little to no literacy to those who have a skilled trade ticket.

Although many of the most highly skilled workers have went to Western Canada to ply their trades, there is anecdotal evidence that they will return when employment prospects brighten in the area.

### 4.4 Guiding Principle #4: There's a Role for Lead Generation and Prospecting

Meeting the “Gold Standard” (as outlined in Section 3.3) is great, but if the phone is ringing only once a month, then the area is not effectively leveraging its investment in this technology. Without a proactive effort of lead generation and prospecting this is exactly what will happen – Nipigon and Red Rock Indian Band will be waiting for people to call rather than generating interest in the product (the communities) so that people will call.

The selection of target industry sectors that follows in this report is an important component of being able to promote/sell effectively. Once there is an understanding and consensus on where the communities have the best chances of being successful, human and financial resources can be focused.

“Selling” is an important part of any economic development professional’s skill set. It should become an integral part of weekly activities. With target sector selected, Nipigon and Red Rock Indian Band can become much more confident in being proactive to reach out to potential investors/visitors and “influencers”.

### 4.5 Guiding Principle #5: Technology Has Significant Implications on Service Delivery

Any economic development organization necessarily responds to a number of publics (or ‘target markets’) in the course of doing business. The chart below outlines the nature of these markets, and our recommendation as to what “top notch” service provision would imply for each. A key philosophy running throughout this Diversification Strategy, and the Action Plans in Phase IV, is to enable the community to provide this kind of service to each of these target markets.

**Figure 33: Service Delivery to Target Markets**

<b>Target Market</b>	<b>How They Interact with Economic Development</b>	<b>Examples of 'Top Notch' Service Provision</b>
<b>Existing Businesses in the Community</b>	<ul style="list-style-type: none"> <li>- enquiries related to business development and expansion</li> <li>- response to various initiatives aimed at retention, upgrading &amp; expansion</li> <li>- participation with economic development organization in advocacy initiatives</li> </ul>	<ul style="list-style-type: none"> <li>- regular visitation to ensure that Nipigon and Red Rock Indian Band are meeting their on-going needs</li> <li>- economic development involvement in various initiatives that improve the overall climate for doing business in the area</li> <li>- immediate response to specific enquiries or, at a maximum, within 24 hours</li> <li>- telephone or face-to-face follow-up</li> </ul>
<b>Potential Tourists and Visitors</b>	<ul style="list-style-type: none"> <li>- enquiries related to tourism attractions, events and facilities</li> </ul>	<ul style="list-style-type: none"> <li>- provision of required information on an attractive and user-friendly tourism-oriented web site</li> <li>- assistance to larger groups with planning visits and events in the area</li> <li>- immediate response to specific enquiries or, at a maximum, within 72 hours by mail</li> <li>- telephone follow-up</li> </ul>
<b>Potential New Businesses</b>	<ul style="list-style-type: none"> <li>- unsolicited enquiries into services and facilities available in the area</li> <li>- response to Nipigon or Red Rock Indian Band's lead generation activities</li> </ul>	<ul style="list-style-type: none"> <li>- maintenance of web site with all required information easily navigable and available</li> <li>- immediate response to enquiries or maximum 24 hours</li> <li>- specific investigations into specific matters of particular interest / concern to the enterprise</li> <li>- telephone follow-up - goal of having a face-to-face meeting at their place of business or having them visit the area</li> </ul>
<b>Potential New Residents (such as Lone Eagles)</b>	<ul style="list-style-type: none"> <li>- unsolicited enquiries into services and facilities available in the area</li> <li>- response to Nipigon or Red Rock Indian Band's lead generation activities</li> </ul>	<ul style="list-style-type: none"> <li>- maintenance of web site with all required information easily navigable and available</li> <li>- immediate response to enquiries or, maximum 24 hours</li> <li>- specific investigations into specific matters of particular interest / concern to the person</li> <li>- telephone follow-up (perhaps even a person from the community who has the same interests and is of approximately the same age) - goal of having them visit the area</li> </ul>

## 4.6 Guiding Principle #6: Economic Sustainability is Possible through Effective Retention

Business retention and expansion is a method of improving the local business environment by allowing the community to learn from its own business people:

- What barriers to growth need to be removed?
- What opportunities exist in the broader economy as well as per individual business?

To date this has not become a regular part of doing business. Currently there is an informal initiative where staff will meet with business owners and senior managers sometimes in response to an emergency and sometimes proactively. Some further formality is warranted to ensure a wider range of business people are contacted. Such an initiative will improve success in business attraction by establishing a better business environment and creating a broader base of Ambassadors to draw upon for incoming Lone Eagles and other business representatives to meet with.

A realistic target would be 50 visits per year (about one per week for the Department's Manager). The use of trained volunteers can help to take the load off of the resource-constrained department.

## 4.7 Guiding Principle #7: Improving Quality of Place is Increasingly Important

Urban and rural quality is increasingly important in attracting both the educated worker as well as business investment. The quality of the built environment and public spaces, the vibrancy of its commercial districts, the condition of the road network and transportation system, telecommunications infrastructure – all of these are necessary and fundamental to attracting a talented labour force and creating a desirable place to live.

Historically, the communities have not performed that well in this regard. Certainly, there are some wonderful places but there is clearly evidence of deteriorated infrastructure and a lack of “extras” that would enhance the beauty of the communities. There are projects in place to upgrade municipal facilities and on a positive note there has been a heavy emphasis on maintaining recreation services even during difficult budget years.

In general, there should be an increased effort at enhancing Nipigon’s downtown and both communities’ frontage on Highway 11/17. Improved access to the waterfront and continual enhancement of four season outdoor experiences is important. These are key assets to the community both from the perspective of driving new commerce in the area as well as contributing to the area’s quality of place and experience.

One key factor to enhancing the highway corridor and stimulating development at the same time is the extension of municipal water and sanitary sewer services. Investors and their financiers are increasingly hesitate to invest in businesses that are on private services, especially those in the hospitality sectors such as restaurants and accommodations. Stricter government legislation on the quality of water and handling and disposal of septage is driving operating costs significantly higher for these businesses and hurting competitiveness. The issue is as important for business owners who are looking to sell existing establishments as it is for investors who are examining new developments.

## 5 Investment Target Opportunities

A sound Diversification Strategy builds upon the unique assets and resources of a community, communicating those characteristics to potential investment and development partners in a way that demonstrates an inherent value proposition unique to that community. In this sense, a community's strengths form the basis of a brand, which conveys a message about both the community's own nature and the nature of those investors and businesses who wish to locate there.

In the increasingly networked world of the global economy, such community brands, while based on local culture, tradition and identity, can increasingly be used to build dynamic external linkages that enhance the community's ability to interact with and compete in the global market. A growing number of entrepreneurial 21<sup>st</sup> Century communities are now utilizing their local advantages and emerging communications technology tools to create international networks designed to spur innovation, investment and job creation, while retaining the positive cultural and environmental assets of their communities.

While combining these trends in local economic development, the selection of economic development opportunities is rooted in the philosophy that **initiatives must ultimately increase the total wealth within a community**. There are two main ways to do this:

1. **Export Development** – any initiative that brings new money into the community:

- Starting or attracting a new business that sells products outside the community
- Attracting visitors who then buy local products and services
- Encouraging existing businesses to sell their products and services outside of the community.

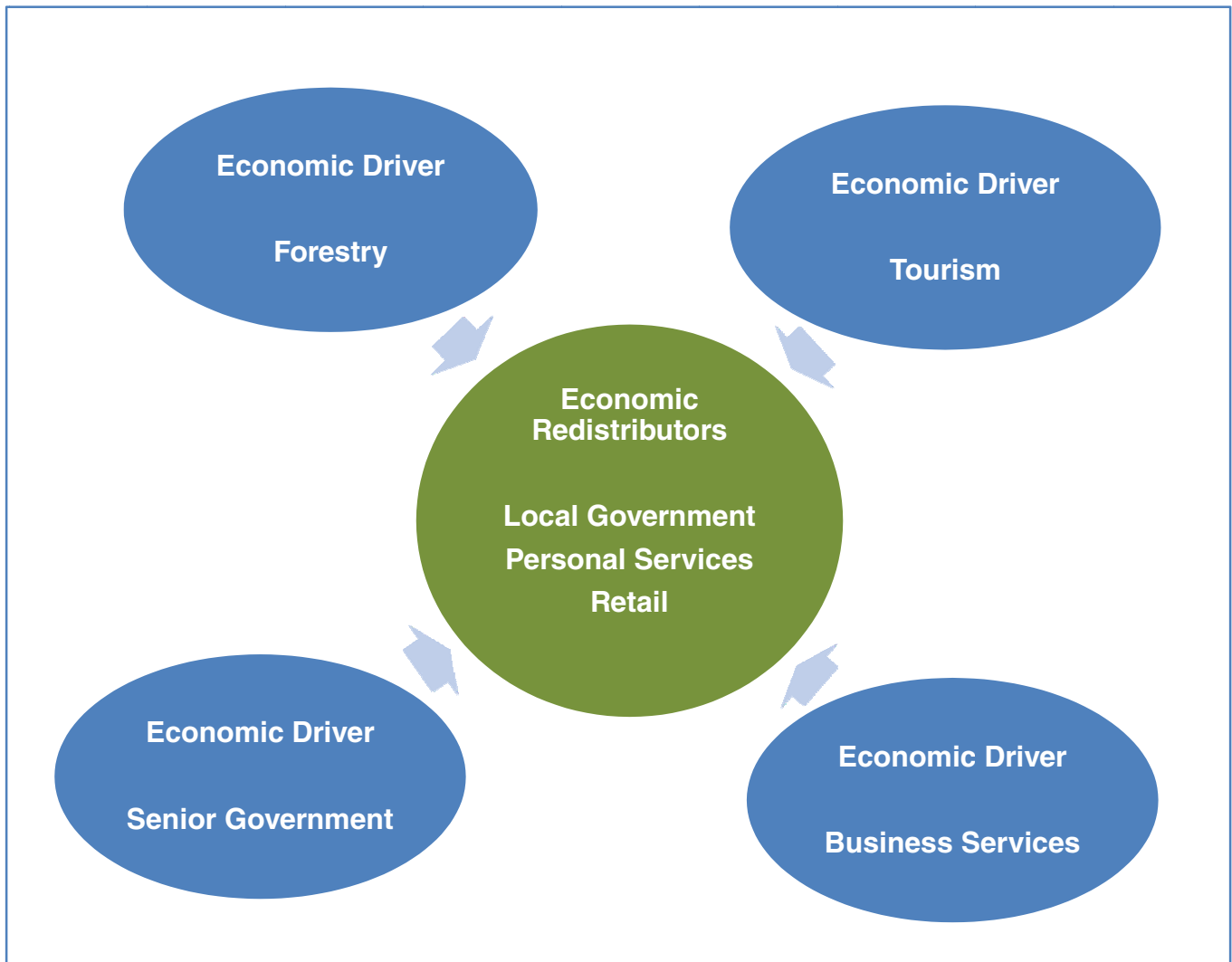
2. **Import Substitution** – any initiative that keeps money in the community:

- Encourage people and businesses to buy their goods and services locally rather than importing them from another community
- Starting or attracting new businesses that recognize the leakage and provide a product or service to stop it.

**Activities in the above two categories are economic drivers – they bring in the wealth. Other activities are redistributors – they circulate the money within a community. Strong economies bring in new money and then keep it in the community as it moves from business to business.**

This is profiled in the following figure.

Figure 34 – Economic Drivers and Redistributors for Nipigon/Red Rock Indian Band



**The highest priority initiatives are those that directly increase wealth** (e.g. the retention or attraction of an export-oriented business, receiving a visitor). This is an aggressive workplan and to be implemented effectively there should be little distraction on non-core issues.

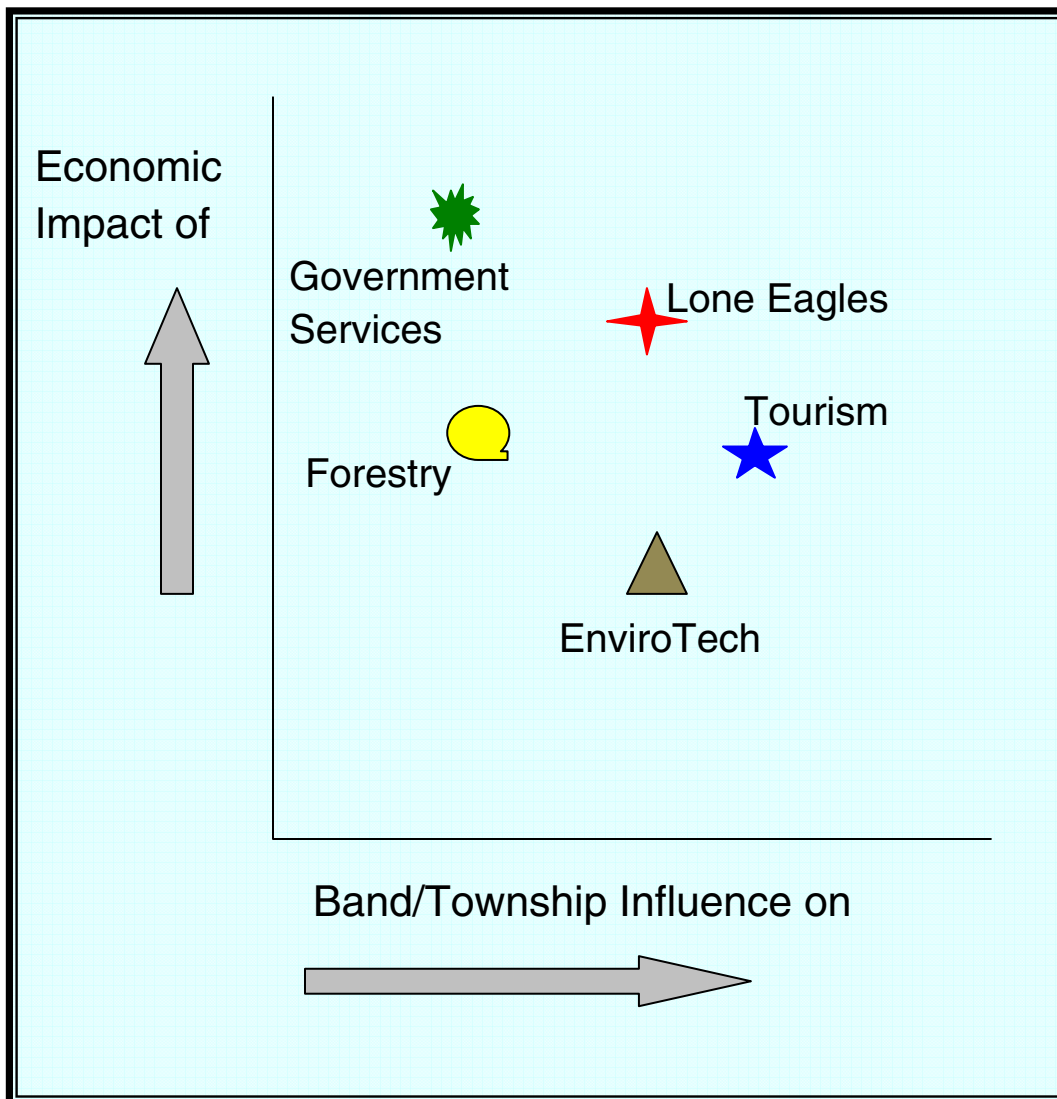
Based on the analysis of Nipigon and Red Rock Indian Band’s economy and trends in the macro-economy, the recommended directions for economic growth are, in priority order:

Red Rock Indian Band	Township of Nipigon
<ul style="list-style-type: none"> <li>• Government Services</li> <li>• Forestry</li> <li>• Tourism</li> <li>• Lone Eagles</li> <li>• EnviroTech</li> </ul>	<ul style="list-style-type: none"> <li>• Lone Eagles</li> <li>• Government Services</li> <li>• Tourism</li> <li>• EnviroTech</li> <li>• Forestry</li> </ul>

These opportunities put focus on the community’s current core strengths and maximize use of underutilized assets. It also gives aim to new directions that have the potential to shape the community for decades to come.

The priority of these objectives was determined by charting them on a graph with two criteria: the economic impact of successfully developing the sector and the influence that the community can have on the development of the opportunity.

**Figure 35: “Economic Impact of” and “Band/Township Influence on” Likely Investment and Job Creation Opportunities**



There is a strong interconnection between the needs of Lone Eagles, Tourists/Tourist Operators and EnviroTech businesses. In many ways the same amenities that attract a tourist will attract a Lone Eagle will.

There is also a very strong connection to cultural sustainability. This economic driver has the potential to stimulate the growth of culture. For members of the Red Rock Indian Band this can mean bringing back performing arts (e.g. music and dance), visual arts (e.g. carving and painting), craft making, learning and relearning Ojibwa language and practicing and perfecting traditional and modern outdoor skills (e.g. building camps, hunting, fishing, trapping).

Based on the skills inventory completed by the Red Rock Indian Band there is an appreciation for the value of traditional practices in both a cultural and economic sense.

**Figure 36: Getting Focused – The Interconnection of the Targets**

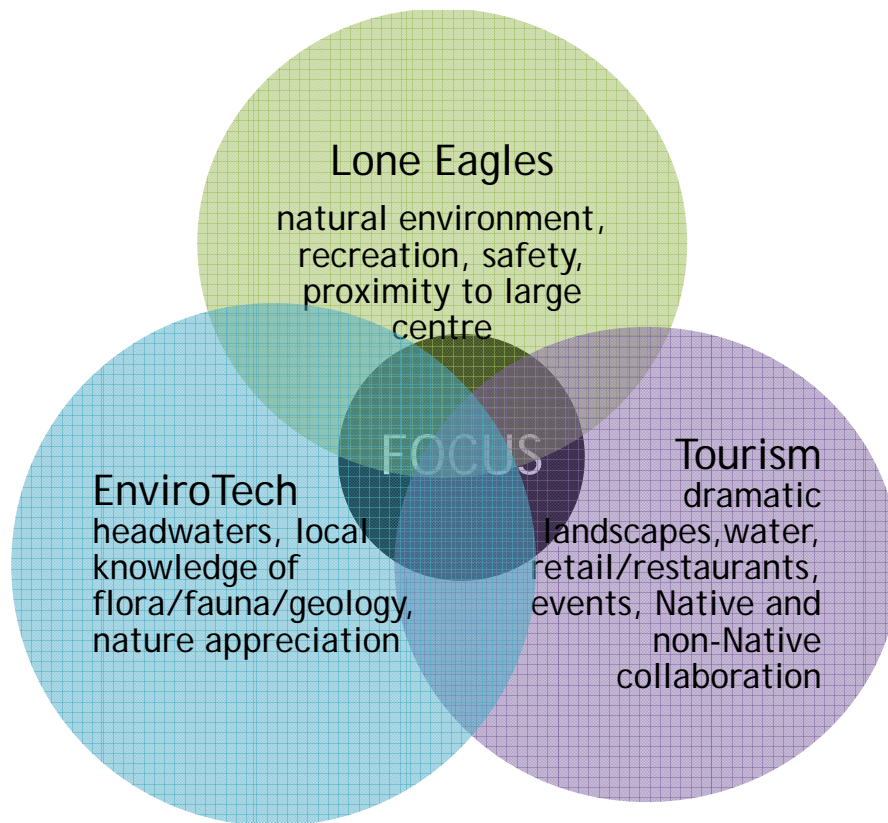


Figure 37: Description of Selected Economic Drivers

	Lone Eagles	Tourism	Government Services	EnviroTech	Forestry
<b>Why this target?</b>	Best way to diversify is to have an economy full of employees from different companies and self-employed entrepreneurs ... needs are similar to those of tourists ... will enhance the social side of community ... local shoppers	A significant investment has been made by RRIB that needs to create a return ... strong link to reinvigorating cultural growth ... a destination for the great outdoors ... the sector is strong in very specific subsectors	A significant contributor of well-paying jobs and tax assessment ... Nipigon is currently hosts many regional offices	Water is the most abundant resource in the area and utilities is the strongest employment sector in the region ... growing global interest in green industries ... knowledge of flora/fauna/geology	Besides water, forests are the most abundant natural resource in the area ... sectoral recession is expected to continue but opportunities exist
<b>Current state</b>	Once we solidify our marketing strategy and enhance our readiness to respond we'll be ready to go out and get the investors!	Extremely competitive marketplace with increasing returns only in specific sub-sectors. We must be extremely targeted and allocate considerable resources.	Nipigon hosts many regional offices and we need to ensure that this investment is retained.	We are not broadly recognized for our capabilities in this sector. We will continue to pursue all government "procurement" opportunities because that is where the opportunities are and it will build our profile amongst the private sector.	The sector is getting battered so we need to turn our attention to maximizing local ownership in harvesting.

	Lone Eagles	Tourism	Government Services	EnviroTech	Forestry
<b>Desired future situation</b>	A 30% increase in the number of lone eagles located in the community in the next five years (baseline needs to be established)	Stable operators that have upgraded accommodations ... a vibrant outdoor scene that is known for four seasons of fun ... profitable lodge, an eclectic blend of performing and visual artists that are contributing to tourism experiences ... 10 targeted festivals a year	Existing government services have remained in the area ... potential new services include administration of National Marine Conservation Area and expanded hospital programs	A few large projects through the provincial and federal governments will help to legitimize us with the private sector.	Local contractors now heading up the harvest of RRIB forests ... Log sorting yard and sawmill serving regional forests ... an operational mill in Red Rock
<b>Capitalizes on these competitive advantages</b>	<ul style="list-style-type: none"> <li>* quality of natural environment</li> <li>* commitment to recreation</li> <li>* safe place to live</li> <li>* lower cost of housing vs. urban</li> <li>* quality healthcare</li> <li>* proximity to Thunder Bay</li> <li>* access to airport</li> </ul>	<ul style="list-style-type: none"> <li>* dramatic landscapes and water</li> <li>* Lake Superior</li> <li>* existing base of accommodations</li> <li>* ice climbing</li> <li>* Native and non-Native collaboration</li> </ul>	<ul style="list-style-type: none"> <li>* modern MNR building</li> <li>* easy access because of location on Highway 11/17</li> <li>* Central to a large geographic region</li> </ul>	<ul style="list-style-type: none"> <li>*near the headwaters of the largest freshwater ecosystem in the world</li> <li>* local knowledge of flora/fauna/geology</li> <li>* native and non-native collaboration</li> <li>* current administrative centre for Ministry of Natural Resources</li> </ul>	<ul style="list-style-type: none"> <li>* Red Rock Indian Band's ownership of timber rights</li> <li>* junction of Highways 11 and 17</li> <li>* vacant modern mill in Red Rock Township</li> <li>* skilled and available labour force</li> </ul>
<b>Be aware of these competitive disadvantages</b>	<ul style="list-style-type: none"> <li>* threat to property values</li> <li>* pressure on property taxes</li> <li>* perception as declining community</li> <li>* jobs for spouse</li> </ul>	<ul style="list-style-type: none"> <li>* Aboriginal culture not commercially-ready</li> <li>* regional tourism efforts are weak</li> <li>Distance to large markets</li> </ul>	<ul style="list-style-type: none"> <li>* low youth populations put pressure on education</li> </ul>	<ul style="list-style-type: none"> <li>* no current connections to research institutions and distant from them</li> <li>* few local specialists</li> </ul>	<ul style="list-style-type: none"> <li>* no manufacturing properties ready to go</li> <li>* little presence of research and development</li> </ul>

**Figure 38: Opportunities in Selected Economic Drivers**

	<b>Lone Eagles</b>	<b>Tourism</b>	<b>Government Services</b>	<b>EnviroTech</b>	<b>Forestry</b>
<b>Estimated near-term sector growth</b>	Strong	Moderate in targeted sectors	Flat	Average to Strong	Flat
<b>Supported by upper-tier development efforts</b>	No	North of Superior and Ontario	No	Ontario, Canada	Ontario, Canada
<b>Complement to existing local base</b>	Very strong	Strong	Very strong	Weak	Very strong
<b>Have a significant and sustaining impact on local economy</b>	Very strong	Strong	Very strong	Strong	Moderate
<b>Municipal capital investment requirement to attract business investment</b>	Minimal	Very significant	Moderate	Moderate	Minimal

## 5.1 Very High Investment Priority: Lone Eagles

Freelance professionals, also known as ‘Lone Eagles’, are knowledge workers with highly transportable skills, such as writers, analysts, artists, accountants, trades people, manufacturers’ representatives and other advisors. Most live in large cities but many are moving to small towns and rural areas for better quality of life. Areas in southern Ontario such as Prince Edward County are centering their entire economic development campaign around this class of individual as well as agri-food producers and tourism operators (see [www.buildanewlife.ca](http://www.buildanewlife.ca)).

Their infrastructure requirements are few, which means limited investment by the municipality. However, the following are essential: efficient telecommunications (mobile phone coverage, broadband access), reliable courier service and reasonable access to an airport with commuter flights.

By definition a Lone Eagle is someone who:

- Generates 75% or more of their income from outside the local area
- Mobile and can live where they want
- What they are fleeing:
  - Urban environment
  - Rapid development
  - Environmental degradation

- What they want to find:
  - Quality of natural environment
  - High quality telecommunications services
  - A place closer to relatives (sometimes means returning “home”)
  - Outdoor recreational activities
  - A safer place to live
  - Lower cost of living
  - Employment for their spouse (if applicable)

Nipigon and Red Rock Indian Band can provide most of these essential infrastructure requirements. They are necessary, but not sufficient, for the area to become a magnet for lone eagle workers (and others who work from home businesses).

Many fledgling entrepreneurs and “lone eagle” professionals would prefer to begin business ventures in their homes where they have fewer expenses and less risk. In response, many communities allow restricted home occupations as permitted uses in many residential zoning districts. When Lone Eagles are successful they expand their operations by leasing office space and hiring staff or contracting out work to other Lone Eagles (e.g. sub-consulting, bookkeeping, etc.).

Telework is another opportunity for Nipigon and Red Rock Indian Band although Statistics Canada shows that the trend for this type of work seems to have reached a plateau of about 9% of workers (stable from 2002 to 2007). This has a lot to do with the fact that many businesses have resisted hiring employees for telework for many years because they are unfamiliar with managing employees who are out-of-sight. There has to be a degree of trust, effective work performance measures, and sometimes also regular meetings face-to-face to maintain these working relationships. Employers are finding the higher quality workers are demanding this type of flexible work arrangement as a condition for employment.

## 5.2 Very High Investment Opportunity: Tourism “Sweet Spot”

Most communities will have several sectors where there is “thickness” – a concentration of businesses, community organizations and culture overlap in their areas of focus and expertise. These are often referred to as areas of local competitive advantage. However, in some instances, communities will have several of these areas of advantage. When it comes to tourism for Red Rock Indian Band and Nipigon, there are a wide range of areas of existing and potential strength and concentration.

The development of a genuine strategy, however, is not merely an exercise in identifying areas of strength. It is a more nuanced approach that allows communities to identify those specific areas of strength that are complimentary to each other and thus identify the point or points at which the community has a regional, national or global competitive advantage. In essence, the cluster development process is built on the notion that where several areas of competitive advantage and strength combine or overlap in an economy, there is an opportunity for aggressively driving additional investment and business growth. Further, because the bulk of this growth is located at the point where strong sectors overlap, it requires a diversity of sectoral strength that few other communities can hope to match or replicate.

For the Band and Township, there is a particularly strong example of this kind of opportunity in the overlap of regional strengths in cultural, environmental education and outdoor recreation tourism sub-sectors. The Band and Township can be (and are in some cases) a concentrated centre of activity in

each of these three areas, each of which – in and of itself – represents a solid potential target for visitor marketing and future investment attraction.

However, it is at the point of overlap, where the fringes of these sectors begin to merge, that the region has unique competitive advantages. For example, while many communities are strong in cultural tourism and some are strong in outdoor recreation, very, very few are strong in both. This means that Nipigon and Red Rock Indian Band should be able to – almost immediately – significantly out-compete other communities for visitors that rely on or are linked to both of these sectors. Add the third pillar (natural environment tourism) and there is a highly focused nexus of competitive advantage where few communities can out-compete Nipigon and Red Rock Indian Band in this space – hence, it is the “sweet spot” for tourism product development and investment attraction efforts.

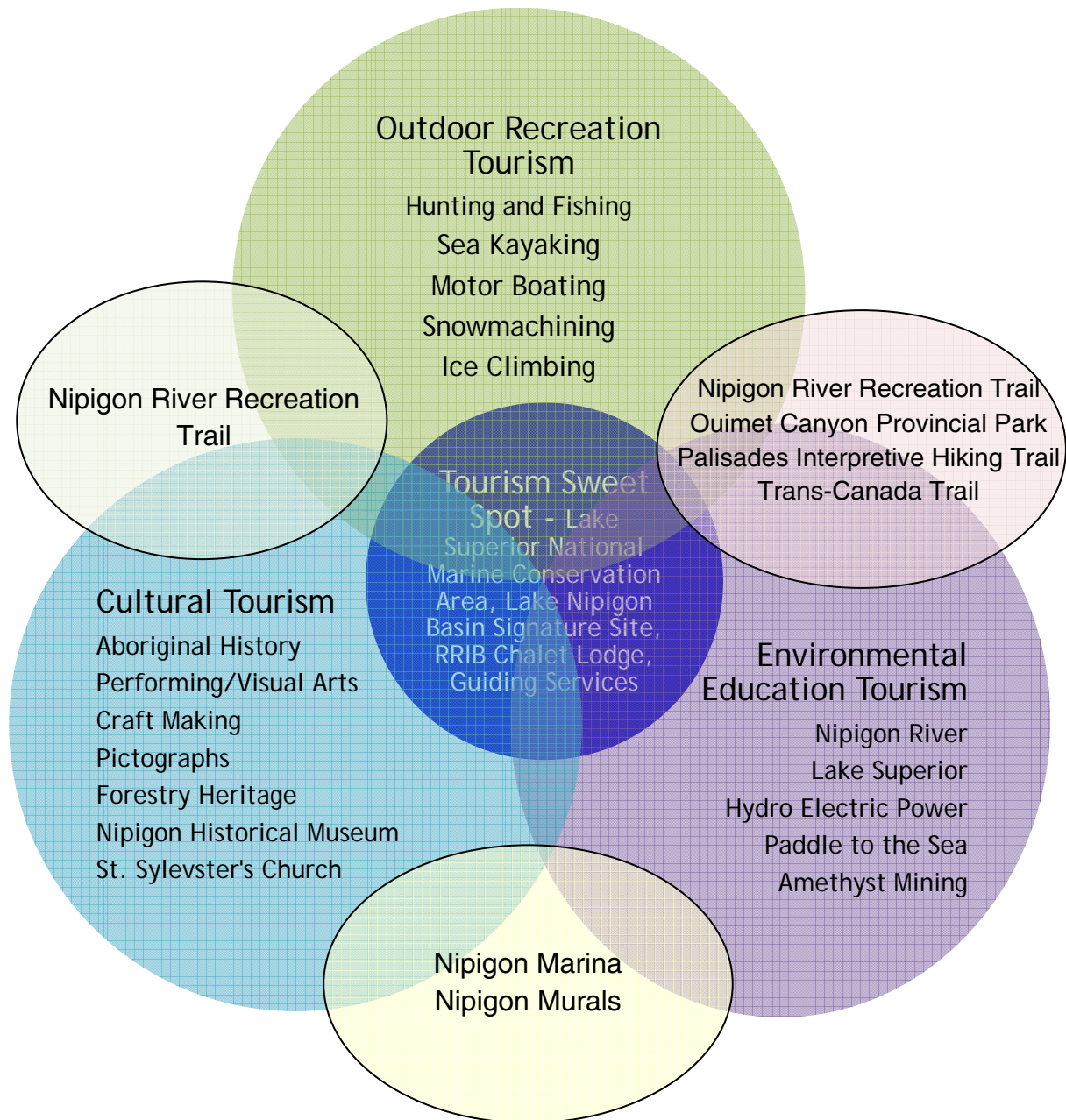
This type of focus is critically important in the tourism industry. This is, by far, the most competitive industry in Ontario. Nearly every community believes that they have assets that are interesting to tourists and they do their best to promote it. The more focused the approach, the fewer competitors.

**Figure 39: Tourism Sub-Sector Convergence and The “Sweet Spot”**



The model suggests that each circle represents an area of local strength. Where two circles overlap, the community has an area of competitive advantage at a regional level. Where three circles overlap, the advantage is significant enough to position the community as a leading destination for tourists at a national and international level. A quick, non-comprehensive survey of local businesses in these sectors reinforces both the notion of depth and complexity within the circles themselves (a test for the legitimacy of the sector identified) and an increasing complexity of interaction where the circles overlap (a demonstration of the successful clustering activity beginning to emerge from the target area). Some examples of this data may be “mapped” on the circles as a means of highlighting or explaining the notion of targeting the areas of overlap.

**Figure 40: Local Strength in Converging Sub-Sectors**



The above figure points to tremendous opportunities, but it also points to challenges because the product is not completely in place. Looking at the items in the centre, which signify the elements that fit right into the Sweet Spot, only the guides are in place and, to date, they are not well organized or publicized. All of these products should be extremely high priorities for completion.

Certain elements are not completely in place. The Red Rock Indian Band's recent Skills Inventory identifies that members are just now starting to recapture their heritage. Quoting the findings:

*You will also note that many of the traditional teachings you expect to see don't show up in this survey as the Red Rock Indian Band members are just now starting to recapture their heritage. It has only been in the last 20 years that the traditional ways have become more accepted. The youth have started to enjoy their heritage and are now passing on anything that they can learn of the original Ojibwa ways. E.g. Women's Drum Group*

## **Travel Market Projections**

Forecasts completed in March 2008 for the Ontario tourism industry project a short-term softness in the market with longer-term upswing. Overall travel to Ontario in 2008 was expected to decline by -0.6% (and that largely came true). Overnight travel will decline by -0.7% and same-day travel will decline by -0.5%.

In 2009, it is expected that travel to Ontario will increase by 1.1% and that trend will continue into the next decade.

**Figure 41 – Ontario Inbound Travel, 2006-2012**

<b>Total Ontario Inbound</b>							
	<b>2006</b>	<b>2007</b>	<b>2008</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>
<b>Total Visits (000)</b>	-3.4%	1.1%	-0.6%	1.1%	1.5%	1.6%	1.7%
Overnight	0.0%	-0.3%	-0.7%	0.3%	1.4%	1.9%	2.2%
Same-day	-5.7%	2.1%	-0.5%	1.6%	1.6%	1.4%	1.4%
Business	-3.5%	-0.7%	-1.1%	1.3%	2.3%	1.1%	1.1%
Non-business	-3.4%	1.2%	-0.5%	1.1%	1.4%	1.7%	1.8%
<b>Total Expenditures (\$000)</b>	-0.6%	1.4%	-1.2%	-0.8%	1.7%	3.1%	3.2%
Overnight	1.2%	-1.1%	-2.4%	1.1%	2.1%	3.5%	3.4%
Same-day	-5.1%	8.1%	1.5%	-5.0%	0.6%	2.3%	2.8%
Business	0.6%	-0.6%	-6.3%	-0.7%	2.9%	2.7%	2.6%
Non-business	-0.9%	2.0%	0.3%	-0.8%	1.3%	3.3%	3.4%

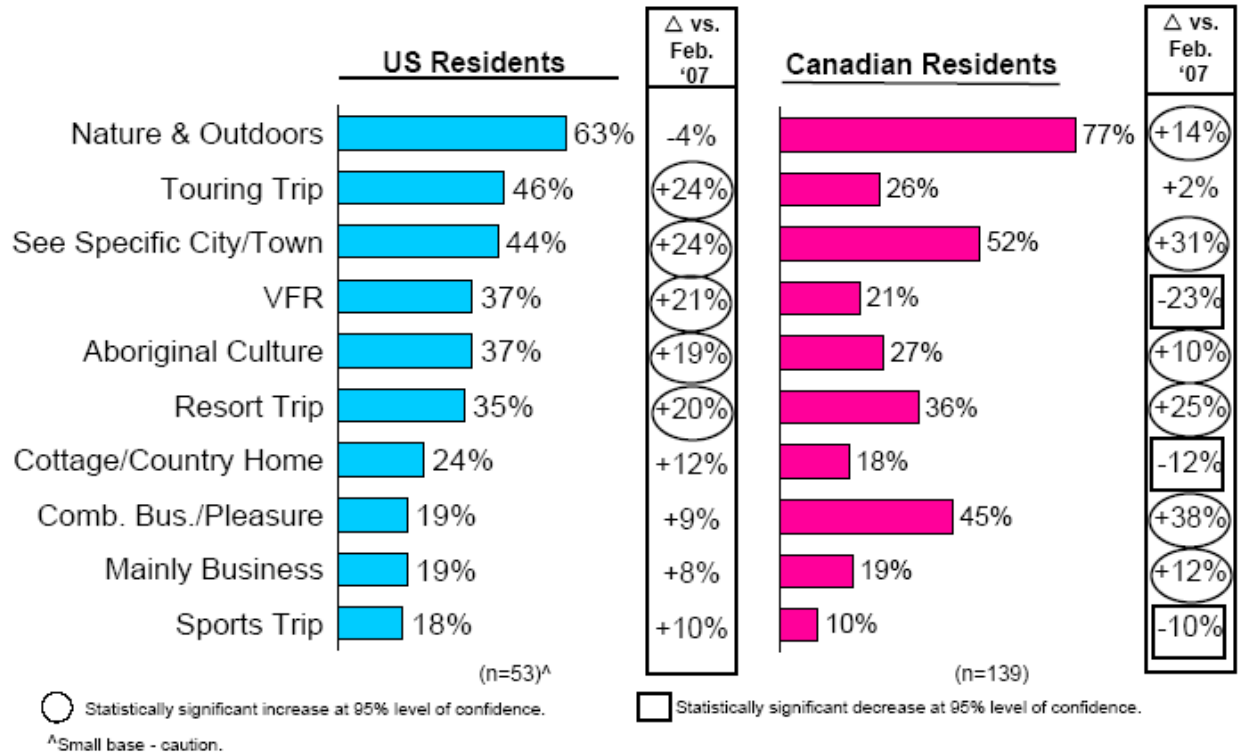
*NOTE: Total visits include domestic, U.S. and overseas, though expenditures include only those of Canadian and U.S. visitors.*

Source: Ontario Ministry of Tourism, 2008

One can be sure that the recent extensive downswing in the economy will affect these figures and that calls for an even more targeted approach in specific tourism sectors. For instance looking at Figure 42, one can see that the sectors in which Red Rock Indian Band and Nipigon have strength are either the most significant sectors or are those that are increasing in popularity.

- Nature and Outdoors – the most popular reason why people visit Northern Ontario and while decreasing slight amongst U.S. residents (-4%) is growing strongly with Canadian residents (+14%)
- Aboriginal Culture is mid-pack in terms of popularity but is showing significant increases (+19% for U.S. residents and +10% for Canadian residents)
- Touring Trips are currently popular and increasing in popularity

**Figure 42 - Reasons for Visiting Northern Ontario In Next 6 Months**



Source: TNS Canadian Facts, 2008, *Travel Intentions Study Wave 9 (Feb '08) for Northern Ontario (Telephone Survey)*

### 5.3 High Investment Priority: Government Services

Recognizing that there may be limited opportunities for growth in the government services sector (with the exception of that around the environment sector, which is discussed separately), there is still no question that this is a very important target for Nipigon and Red Rock Indian Band. This sector scores very high in terms of location quotients, which is a measure of the current relative importance of an employment sector.

The area is home to many regional government offices and service sites. For example:

- Ministry of Natural Resources
- Ontario Provincial Police
- hospital services
- education services
- electricity generation

The emphasis here is not so much on attracting more investment, but ensuring that the existing investment remains in the community. While staying abreast of the current office situations, the community will learn more about expansion opportunities and will be ready to act.

The Ministry of Natural Resources' building is a core asset to the community because it provides excellent facilities for other departments and organizations. Oftentimes in government there is short-term need for space for a pilot project or other type of administration. As such the Township should be working with senior managers to ensure that any vacant space is made available for other organizations to make use of. It not only takes a proactive Township, but it also takes a motivated government manager to work hand-and-hand with the Township to identify and capitalize on opportunities.

## 5.4 High Investment Priority: EnviroTech

Concerns over water quality and adequate supply have become an important issue in Canada and the rest of the world in recent times. These concerns will become greater as the expanding human population puts more and more demand on this limited resource. Quality research and trained professionals capable of solving the complex problems related to sustaining or improving water quality to meet these demands is a projected area of growth in future employment forecasts.

As one of the nearest communities to the headwaters of the largest freshwater ecosystems in the world and one that has already been modified significantly by humankind (through river diversions, hydro electric installations, bridges, forest harvesting, sport fishing, etc.), there is an opportunity for Nipigon and the Red Rock Indian Band is to establish itself as a science and administration centre as well as a launching point for science that is completed in the region, which we have termed "EnviroTech".

This broad area of knowledge-based business activity includes a wide range of engineering, research, testing, and data management activities, coupled with hands on field efforts in direct interaction with the natural and physical sciences.

Areas of activity in the EnviroTech sector include:

- Water and wastewater treatment
- Industrial and hazardous waste treatment
- Solid waste management and recycling
- Ecological habitat conservation and rehabilitation
- Air pollution monitoring and control
- Instrumentation and monitoring equipment
- Environmental software and consulting services
- Site remediation and brownfield development
- Energy creation and conservation

In essence, the sector seeks to apply knowledge-based approaches to society's interactions with the natural environment, and to improve those interactions by increasing efficiency, improving economic opportunity and reducing negative environmental impacts.

The targeting of EnviroTech industries by Red Rock Indian Band and Nipigon rests on a business case based on the following:

- The area provides an environment in which EnviroTech businesses can easily and frequently interact with the natural environment and conduct detailed field testing and research
- The area is the largest service community near the headwaters of the Great Lakes and a region that has seen significant disturbance by human practice including river diversion, hydro electric generating stations, sport fishing and forestry practices
- The area has the potential to host the administrative headquarters for the Lake Superior National Marine Conservation Area
- The area is in close proximity to major natural resource industries, including globally significant forestry, mining and fishing industries

However, there are weaknesses that must be overcome in order to move this sector forward:

- There are very few linkages to sectoral research and innovation bodies such as Lakehead University's Water Resource Sciences program; Innovation Initiatives Ontario North, Laurentian University's Cooperative Freshwater Ecology Unit
- There are very few local professionals in engineering services, the foundation of the sector

### **How will residents benefit from this sector?**

Although it may sound like one needs a university degree in the sciences to benefit from this sector, but that is far from the truth. Yes, people with these specializations will be required and in large part those people are not residents of the area (currently!). However, beyond that these projects will employ people with:

- a strong understanding of local flora, fauna and geology (something that the Red Rock Indian Band's Skills Inventory identifies as being readily available)
- forestry skills
- guiding skills
- strong backs that do hard physical labour.

The following table is an example of the type of work that is created in an environmental rehabilitation project. Notice the number of jobs that would be immediately filled by residents.

**Figure 43: Employment Benefits in an EnviroTech Project**

<b>Area</b>	<b>Skill Set</b>	<b>Estimated Full Time Equivalent (Scoping Study)</b>	<b>Pre-Scoping Estimate of FTE (Rehabilitation)</b>
Guiding Services	Local knowledge and guiding experience	4	40
General Labour	Assist in clearing routes, other tasks	4	150
Machinery Operation	Driving and/or operating heavy machinery	2	50
Consulting	Professional Experience	4	10
Environmental Assessment	Professional Certification	3	20
Water Quality and Flow Assessment	Professional and Lab Assistant	2	30
	<b>TOTAL</b>	<b>19</b>	<b>300</b>

What is certain is that these types of projects have significant economic impact for residents but also those in the hospitality industry. Nipigon and Red Rock Indian Band have a workforce of labourers unemployed by the forestry slowdown that would benefit from such a project through direct employment. Any proposal should include a policy of hiring qualified candidates from among the local population first, as one of the goals of this initiative is to boost local employment.

## 5.5 Medium Investment Priority: Forestry

There are many communities in Northern Ontario that are feeling the negative impacts of a perfect storm that has struck the forestry sector over the last two years: decreasing demand for housing materials in the United States, an appreciated (and volatile) Canadian dollar, increasing energy costs, increasing competition from lower-cost countries and the presence of relatively small mills that do not have the economies of scale to compete on price. Without question, these have been hard times in a very cyclical industry.

Locally, the situation could not be worse with the two main forestry sector employers closing: Nipigon's Multiply mill was destroyed by fire in 2007 and Red Rock Township's Norampac linerboard mill has been closed since 2006. In total, about 500 people have lost their manufacturing jobs and that has had negative indirect spin-off effects on harvesting operations.

There is, locally, a sense that the sector may have hit its low and the impacts of the pine beetle's destruction on the forests in British Columbia will lead to growth in the Ontario forestry sector. Despite

this, with the burning of the mill in Nipigon has left the community without much hope that an industrial installation will come again – there are just too many vacant existing mills all over the north to warrant the reconstruction of a new one.

With all of this in mind, the recommendations on this sector lean more to opportunities for the Red Rock Indian Band, who is in control rights to large swaths of forest. This sector is identified only as a medium investment priority with the following opportunities:

- encouraging the growth of logging labourers to become managers and contract business owners
- the establishment of a log sorting operation to service the region's harvesting<sup>2</sup>
- supporting the efforts of Red Rock Township to identify a future user of the former Norampac Mill – when the sector upturns (and it will, someday) this facility is modern and very well positioned for new investment

It is impossible to tell in a sector as cyclical as forestry when the current downturn will evolve into more positive events. In fact, Northern Ontario may never again see a boom like occurred in the 20<sup>th</sup> Century. However, it may happen and the community should be prepared to react. There have been many studies completed over the last decade at local, regional and provincial levels that provide insight into the capacity of communities like Nipigon and Red Rock Indian Band to host value-added forestry businesses. If (when) forestry picks up it needs to be a more significant part of the community's go forward strategy.

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<sup>2</sup> Based on the findings of this research, the Red Rock Indian Band is encouraged NOT to put a log sorting operation at the junction of Highways 11 and 17. If the Ministry of Transportation was ever to give up rights to this property, its highest and best use is as a commercial or institutional development (e.g. visitor services, restaurant, accommodation, local retail, etc.). In addition, a log sorting operation in such a visible location is contrary to the type of physical environment that the community will try and establish as it goes after three of the top priority investment sectors identified herein: lone eagles, cultural/recreational/environmental tourism and envirotech.

## 6 Understand Roles of Local Organizations

### 6.1 Dealing with Limited Resources

Neither Nipigon nor Red Rock Indian Band's economic development offices are large in terms of staff or budget. At the same time, they have been very effective at obtaining funding from senior levels of government to leverage local funds. In Nipigon, there is enough funding for a full-time Economic Development Officer and full-time Coordinator, administrative overhead as well as some money left over to initiate projects. The Red Rock Indian Band has the same except just one full-time staff person. Local financial commitments are made on a year-to-year basis which hampers long-term planning.

The Implementation Plan will look at a three year time frame with achievable short-term goals to encourage the prospect of an ongoing commitment. With limited dollars and people to carry out the mandate it is very important to remain focused. Although short-term successes are possible, the investment attraction sectors that have been identified will take many years to see fully evolve.

In addition, as this work has also shown, economic development does not act in isolation – it impacts and is impacted by the community's environmental, cultural and social objectives. As a result, the communities' economic development functions must be open to partnerships: accepting them when approached by others and being proactive about establishing them. Sometimes Nipigon and the Red Rock Indian Band will be the:

- Leader – initiating the partnership and taking primary responsibility for implementing it
- Facilitator – initiating the partnership and taking little to no role in implementation
- Supporter – reacting to a partnership invitation and contributing time and/or money towards implementation.

Consultant Virginia Daffron<sup>3</sup> provides this point advice for small organizations that have limited financial and human resources and it has relevance to this implementation plan:

*What you don't do is as important as what you do: Many firms engage in activities that they feel are obligatory or can't hurt, such as creating ads used only once or responding to long-shot RFP proposals, even though the effectiveness seems questionable. For every marketing activity your firm undertakes, there's another activity you can't do. When your capacity is smaller, the importance of focusing that capacity in a productive direction becomes even more critical.*

### 6.2 Active Local Economic Development Organizations

Economic development is a dynamic landscape. No matter what community, there are always many forces and organizations involved. This is easy to understand when one looks at the variety of projects that are considered to be "economic development". These include delivering services for small businesses and entrepreneurs, business investment attraction, business retention and expansion, tourism marketing, workforce training, physician recruitment, community beautification, brownfield redevelopment, downtown revitalization, shop local programs and running events.

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<sup>3</sup> Source: [www.RainToday.com](http://www.RainToday.com).

Nipigon and Red Rock Indian Band are no different from any other community. In fact, the lack of a formal regional economic development initiative has fostered an environment where local organizations have formed or expanded their mandate to include some of the above initiatives. The purpose of this part of the work is to ultimately decide which direction to take the Marketing and Implementation Plans. Who should be responsible for what? These questions will be fully answered in Phase IV of the project, but the following detail is important to gain an initial understanding.

The following table identifies the economic development initiatives/projects that are currently active in Nipigon and Red Rock Indian Band and identifies their key focus.

Glossary of terms found in the table below:

- Tourism Marketing – Promoting the area to visitors and providing visitor services.
- Tourism Product Development (incl. Events & Festivals) – Enhancing the location (i.e. the product) in order to make it more enticing to prospective visitors.
- Small Business – Counselling, training and financing services to new entrepreneurs or existing small businesses facing challenges of growth or decline.
- Infrastructure & Planning – Includes enhancing the physical infrastructure of the community (e.g. roads, utilities, telecommunications) and completing Official Plans and Zoning By-laws.
- Natural Resources (Forestry) – Developing and delivering projects that will assist the growth of the local forestry (harvesting and processing) and forestry bioproducts (utilizing biomass found in forests for value added production such as fuel).
- Labour Force Development – Identifying and addressing weaknesses in the local or regional labour force.
- Investment Attraction – Identifying target markets and promoting the area for the purposes of attracting commercial, industrial, residential or institutional investments.
- Business Retention & Expansion – Identifying concerns of the local business community and addressing them in an effort to improve the local business environment.

**Figure 44: Key Development Priorities of Organizations Serving Nipigon and Red Rock Indian Band**



indicates a core responsibility

■ indicates a non-core focus

Organization	Tourism Marketing	Tourism Product Dev.	Small Business	Infrastructure & Planning	Natural Resources	Labour Force Development	Investment Attraction	Business Retention & Expansion
Red Rock Indian Band	■	✓		✓	■		✓	■
Township of Nipigon	✓	✓		✓			✓	✓
North of Superior Tourism Association	✓	■						
Land of Nipigon Chamber of Commerce		✓	✓					■
Superior North Community Futures Development Corporation			✓			■	■	✓
Provincial Government <sup>4</sup>	✓	■	✓	✓	✓	✓	✓	■
Federal Government <sup>5</sup>	✓		■	✓	✓	■	✓	
Northern Ontario Biotechnology Initiative					■		■	■
Innovation Initiatives Northern Ontario					■		■	■

<sup>4</sup> Includes Ministry of Northern Development and Mines; Tourism; Agriculture, Food & Rural Affairs; Small Business & Entrepreneurship and Transportation

<sup>5</sup> Includes Services Canada; FedNor

It is evident from the above chart that there are many organizations involved in the area. Additional groups that are not identified above include:

- Lakehead University, Confederation College and North Superior Training Board who are involved in workforce development.
- Related to tourism product development, there are many organizations involved including those that host festivals, Nipigon Bay Snowmobile Club, etc.

All of the above organizations will be identified in the Implementation and Marketing priorities that will be completed within the next part of this consulting exercise. Just as will be done with the Township and the Band, they will act as leaders, facilitators or supporters depending on the activity in question.

## Appendix

EMPLOYEE SIZE RANGE	Total (A)	Int (B)	Sub (A - B)	1- 4	5- 9	10- 19	20- 49	50- 99	100- 199	200- 499	500 +
112930 - Fur-Bearing Animal and Rabbit Production	1	1	0	0	0	0	0	0	0	0	0
113311 - Logging (except Contract)	4	2	2	2	0	0	0	0	0	0	0
113312 - Contract Logging	11	4	7	4	1	2	0	0	0	0	0
212316 - Marble Mining and Quarrying	1	1	0	0	0	0	0	0	0	0	0
221112 - Fossil-Fuel Electric Power Generation	1	0	1	0	0	1	0	0	0	0	0
221122 - Electric Power Distribution	1	0	1	0	0	1	0	0	0	0	0
221210 - Natural Gas Distribution	1	0	1	0	0	1	0	0	0	0	0
236110 - Residential Building Construction	2	1	1	1	0	0	0	0	0	0	0
238220 - Plumbing, Heating and Air-Conditioning Contractors	2	1	1	1	0	0	0	0	0	0	0
238350 - Finish Carpentry Contractors	1	1	0	0	0	0	0	0	0	0	0
238910 - Site Preparation Contractors	1	0	1	1	0	0	0	0	0	0	0
238990 - All Other Specialty Trade Contractors	1	1	0	0	0	0	0	0	0	0	0
321211 - Hardwood Veneer and Plywood Mills	1	0	1	0	0	0	0	0	1	0	0
441120 - Used Car Dealers	1	1	0	0	0	0	0	0	0	0	0
443120 - Computer and Software Stores	1	0	1	1	0	0	0	0	0	0	0
444110 - Home Centres	1	0	1	0	1	0	0	0	0	0	0
445110 - Supermarkets and Other Grocery (except Convenience) Stores	1	0	1	0	0	0	1	0	0	0	0
445120 - Convenience Stores	2	2	0	0	0	0	0	0	0	0	0
445310 - Beer, Wine and Liquor Stores	2	0	2	2	0	0	0	0	0	0	0
446110 - Pharmacies and Drug Stores	1	0	1	0	0	1	0	0	0	0	0
447110 - Gasoline Stations with Convenience Stores	2	0	2	0	0	1	0	1	0	0	0
447190 - Other Gasoline Stations	2	1	1	0	0	0	1	0	0	0	0
448140 - Family Clothing Stores	1	0	1	1	0	0	0	0	0	0	0
448310 - Jewellery Stores	1	0	1	1	0	0	0	0	0	0	0
451220 - Pre-Recorded Tape, Compact Disc and Record Stores	1	0	1	1	0	0	0	0	0	0	0
452991 - Home and Auto Supplies Stores	1	0	1	0	0	1	0	0	0	0	0
452999 - All Other Miscellaneous General Merchandise Stores	3	0	3	2	1	0	0	0	0	0	0
453110 - Florists	1	1	0	0	0	0	0	0	0	0	0
453220 - Gift, Novelty and Souvenir Stores	1	0	1	1	0	0	0	0	0	0	0
483115 - Deep Sea, Coastal and Great Lakes Water Transportation (except by Ferries)	1	1	0	0	0	0	0	0	0	0	0
484122 - General Freight Trucking, Long Distance, Less Than Truck-Load	1	1	0	0	0	0	0	0	0	0	0
484222 - Dry Bulk Materials Trucking, Local	1	1	0	0	0	0	0	0	0	0	0
484223 - Forest Products Trucking, Local	2	1	1	1	0	0	0	0	0	0	0
485310 - Taxi Service	1	1	0	0	0	0	0	0	0	0	0
485410 - School and Employee Bus Transportation	1	0	1	1	0	0	0	0	0	0	0
511110 - Newspaper Publishers	1	0	1	1	0	0	0	0	0	0	0
519121 - Libraries	1	0	1	1	0	0	0	0	0	0	0
523910 - Miscellaneous Intermediation	1	1	0	0	0	0	0	0	0	0	0
523920 - Portfolio Management	2	2	0	0	0	0	0	0	0	0	0
523990 - All Other Financial Investment	1	1	0	0	0	0	0	0	0	0	0

Activities											
531120 - Lessors of Non-Residential Buildings (except Mini-Warehouses)	1	1	0	0	0	0	0	0	0	0	0
531211 - Real Estate Agents	1	1	0	0	0	0	0	0	0	0	0
541110 - Offices of Lawyers	1	1	0	0	0	0	0	0	0	0	0
541213 - Tax Preparation Services	1	0	1	1	0	0	0	0	0	0	0
541215 - Bookkeeping, Payroll and Related Services	1	0	1	1	0	0	0	0	0	0	0
541330 - Engineering Services	1	0	1	1	0	0	0	0	0	0	0
541611 - Administrative Management and General Management Consulting Services	1	0	1	1	0	0	0	0	0	0	0
541619 - Other Management Consulting Services	1	1	0	0	0	0	0	0	0	0	0
541840 - Media Representatives	1	0	1	1	0	0	0	0	0	0	0
551113 - Holding Companies	5	4	1	0	0	1	0	0	0	0	0
611690 - All Other Schools and Instruction	2	0	2	2	0	0	0	0	0	0	0
621110 - Offices of Physicians	6	1	5	4	1	0	0	0	0	0	0
621340 - Offices of Physical, Occupational, and Speech Therapists and Audiologists	1	0	1	1	0	0	0	0	0	0	0
621390 - Offices of All Other Health Practitioners	1	0	1	1	0	0	0	0	0	0	0
622111 - General (except Paediatric) Hospitals	1	0	1	0	0	0	0	0	0	1	0
713910 - Golf Courses and Country Clubs	1	0	1	1	0	0	0	0	0	0	0
713990 - All Other Amusement and Recreation Industries	2	0	2	2	0	0	0	0	0	0	0
721111 - Hotels	1	0	1	0	1	0	0	0	0	0	0
721114 - Motels	7	0	7	7	0	0	0	0	0	0	0
721211 - RV (Recreational Vehicle) Parks and Campgrounds	1	0	1	1	0	0	0	0	0	0	0
721212 - Hunting and Fishing Camps	1	1	0	0	0	0	0	0	0	0	0
722110 - Full-Service Restaurants	4	1	3	2	0	1	0	0	0	0	0
722210 - Limited-Service Eating Places	1	1	0	0	0	0	0	0	0	0	0
722330 - Mobile Food Services	1	1	0	0	0	0	0	0	0	0	0
811111 - General Automotive Repair	2	0	2	2	0	0	0	0	0	0	0
811119 - Other Automotive Mechanical and Electrical Repair and Maintenance	1	1	0	0	0	0	0	0	0	0	0
811122 - Automotive Glass Replacement Shops	1	0	1	1	0	0	0	0	0	0	0
811310 - Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance	2	1	1	1	0	0	0	0	0	0	0
812115 - Beauty Salons	1	1	0	0	0	0	0	0	0	0	0
812116 - Unisex Hair Salons	2	1	1	1	0	0	0	0	0	0	0
812190 - Other Personal Care Services	1	1	0	0	0	0	0	0	0	0	0
812210 - Funeral Homes	1	0	1	1	0	0	0	0	0	0	0
812320 - Dry Cleaning and Laundry Services (except Coin-Operated)	1	1	0	0	0	0	0	0	0	0	0
813110 - Religious Organizations	1	0	1	1	0	0	0	0	0	0	0
813410 - Civic and Social Organizations	2	0	2	2	0	0	0	0	0	0	0
813910 - Business Associations	1	0	1	1	0	0	0	0	0	0	0
913910 - Other Local, Municipal and Regional Public Administration	1	0	1	0	0	0	1	0	0	0	0
914110 - Aboriginal Public Administration	2	0	2	1	0	0	1	0	0	0	0
<b>Total</b>	<b>126</b>	<b>45</b>	<b>81</b>	<b>59</b>	<b>5</b>	<b>10</b>	<b>4</b>	<b>1</b>	<b>1</b>	<b>1</b>	<b>0</b>