

TRENDS IN HAMILTON'S LABOUR MARKET

Local Labour Market Plan Update – 2019-2020

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Workforce Planning Hamilton would like to thank all of those who contributed to this report including employers who provided valuable feedback on local labour market conditions throughout the year in our surveys and interviews. Your time is always appreciated. We would also like to recognize the employment services community and our other valuable partners who work so diligently to support workforce development in Hamilton.



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The information presented in this report is current at the time of printing.

Welcome to Workforce Planning Hamilton's 2020 Labour Market Plan Update.

This brief report provides an update on what is happening in Hamilton's labour market. It includes the latest information on Hamilton's economy; updates key labour market indicators; provides a workforce profile including who is using services; and presents our labour market action plan for the coming year.

To develop this report WPH reviews the latest facts and stats available for Hamilton. This includes checking in with our colleagues at Economic Development for the City of Hamilton, tracking news stories in the local media and reviewing any reports that we have developed or other research conducted by community partners. We also review the latest statistics available through Statistics Canada and review this information and how it aligns with and enhances local intelligence gathered through our own employer networks and the EmployerOne survey. Finally we check in with local employment service providers to understand how these conditions are impacting the clients that they serve and how those clients are faring in the local economy.

In the next few pages, take a moment to catch up on the latest information facts and stats on Hamilton's labour market and read our labour market strategy to learn about key priorities and plans for action.

How is Hamilton's economy doing?

For the past three years we have seen unprecedented growth in Hamilton in many sectors from a both a workforce and economic perspective. Hamilton's Economic Development department continues to report on new investments in Hamilton that will, at some point, foster even greater job creation.

Some Headlines from 2019¹:

- Significant expansion planned at Parish & Heimbecker Flour Mill (April 2019)
- Shovels in the ground for \$20 million Marriott hotel development on Hamilton mountain – estimated 35 new jobs (May 2019)
- Expansion well underway at KF Aerospace - Since announcing the project, KF has hired 30 new staff in preparation for the new facilities and is still recruiting for nearly 60 additional vacancies (June 2019)
- Sucro-Sourcing announces a new sugar refinery in Hamilton (June 2019)
- L3 chooses Hamilton for WESCAM head office – new home to over 1200 employees (June 2019)
- Hamilton's Mondelez candy factory has launched a \$40-million plant expansion – they added 50 positions to bring total staffing up to 350 workers at the 24-hour operation (October 2019)
- Quebec steel company Corbec is expanding to Hamilton with a plant in the Red Hill Business Park – 110 full-time workers when complete (November 2019)

About Workforce Planning Hamilton

Since 1997 WPH has provided planning, partnerships and projects that highlight local labour market trends and support workforce development. WPH is a member of Workforce Planning Ontario, a network of 26 labour market planning areas across Ontario. Our evidence-based approach relies on key industry sector and demographic data combined with local intelligence from employers and other local partners to develop a strategic vision for Hamilton. We are funded by the Ministry of Labour Training and Skills Development.

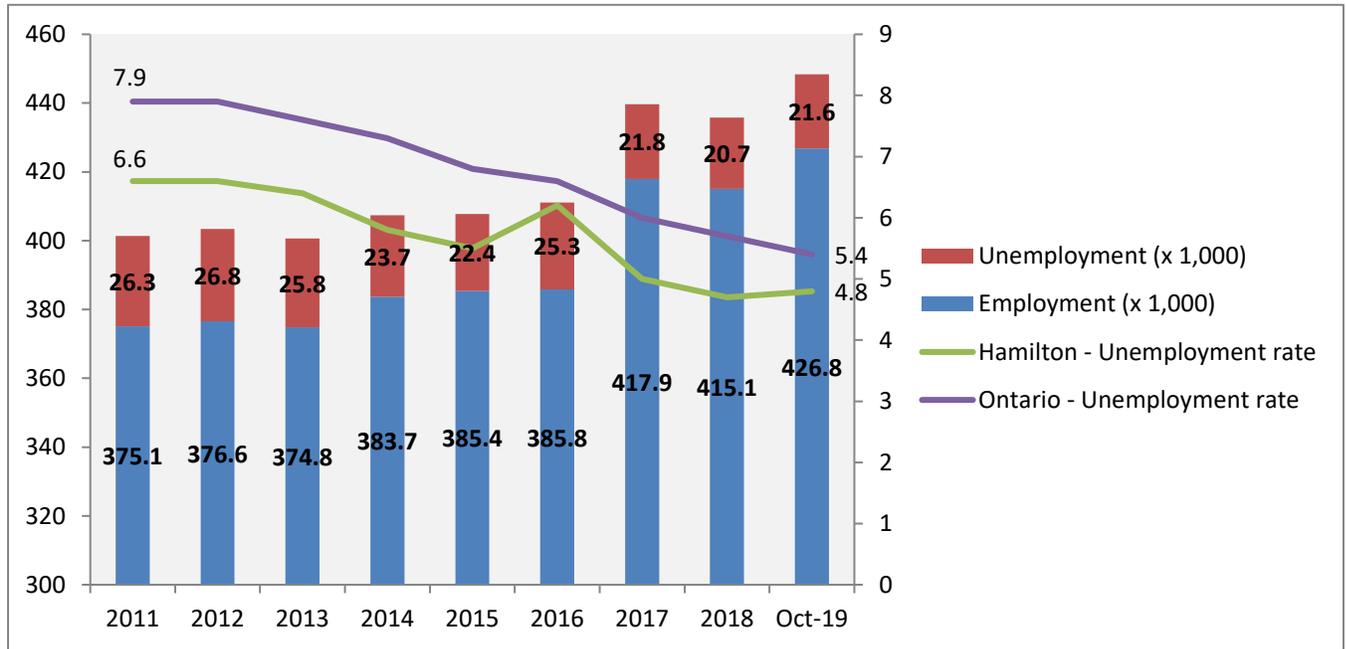
¹ Source: Invest in Hamilton website: <https://investinhamilton.ca/news/>

LABOUR DEMAND

Continued workforce growth signals a strong economy

The labour market continues to tighten in Hamilton. Jobs are being created and the unemployment rate continues to fall to its lowest level in decades. From 2011 to October 2019 there have been 51,700 jobs created bringing the total number of people employed to 426,800. The number of unemployed over this time also fell by 4700 to a low of 21,600 people. Hamilton's economy is strong relative to other communities and the province as a whole. Its unemployment rate at 4.8% is consistently lower than Ontario's unemployment rate at 5.4%. Employers report that they are having increasing difficulty recruiting for the skills and experience that they require.

Labour Force Figures, 2011 to 2019, Hamilton (Census Metropolitan Area)



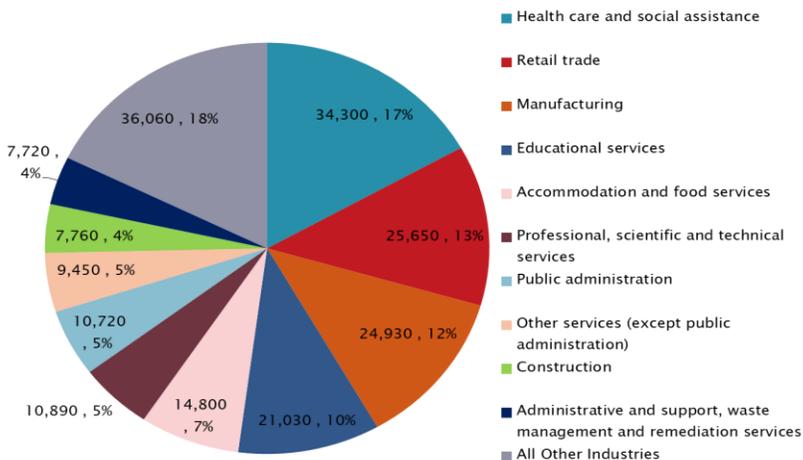
Hamilton Labour

Source: Labour Force Survey

Hamilton's economy is diverse

Hamilton has long been recognized as having the most diverse economy in Canada according to the Conference Board of Canada.

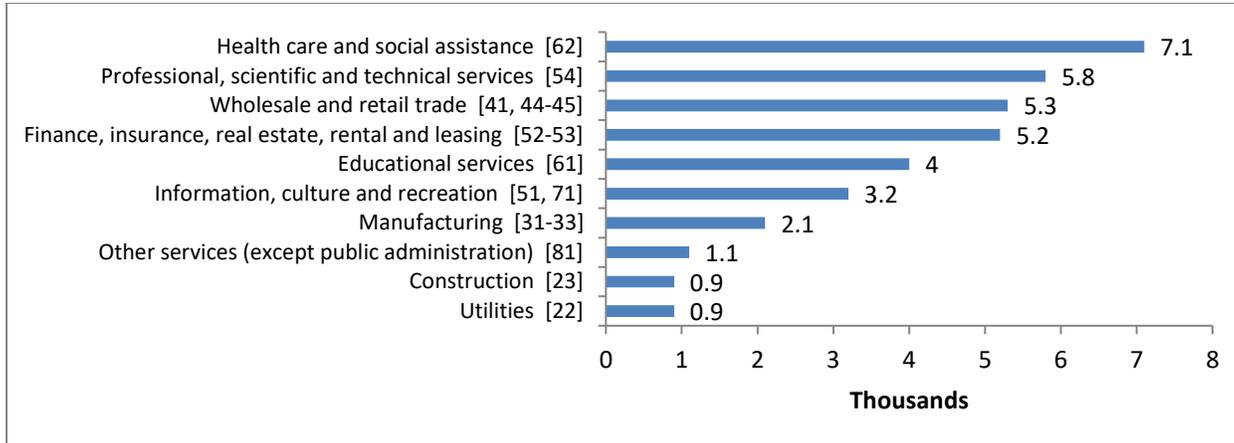
Distribution of Hamilton Industries, 2016 Hamilton (Census Division)



Strong employment growth among the highest skilled sectors

While growth occurred across most industries, the strongest growth came from *Health care and social assistance* and *Professional, scientific and technical services*. The 2019 Employer One Survey also found a large number of employer respondents in these industries plan on hiring. These two industries have the highest educational levels with most workers having postsecondary education.

Change in Employment, 2014 to 2018, Hamilton (Census Division)



Source: Labour Force Survey

Strong growth in small businesses (Canadian Business Counts - Stats Can)

Total Businesses in Hamilton

50,776

4,976 that are yet to be classified into sectors

Businesses without employees
(owner operated/sole proprietor)

30,930

Businesses with employees

14,860

Top 5 Industries:

Industry	Businesses
531 - Real estate	8,213
541 - Professional, scientific and technical services	3,580
238 - Specialty trade contractors	2,020
523 - Securities, commodity contracts, and other financial investment and related activities	1,771
621 - Ambulatory health care services	1,748

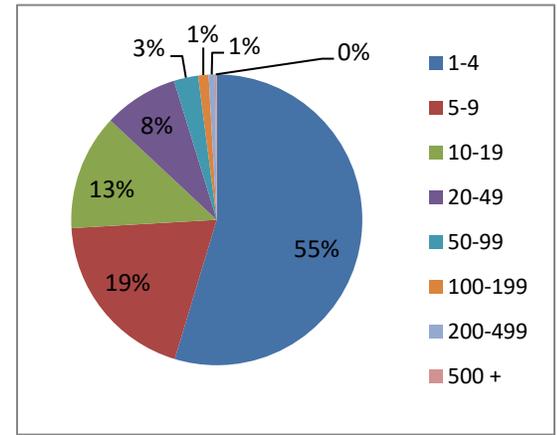
Top 5 Industries:

Industry	Businesses
541 - Professional, scientific and technical services	1,541
621 - Ambulatory health care services	1,430
238 - Specialty trade contractors	1,429
722 - Food services and drinking places	1,024
484 - Truck transportation	717

Employer Size Distribution

There was an 87% increase in businesses with less than 20 employees from 2015 to 2018

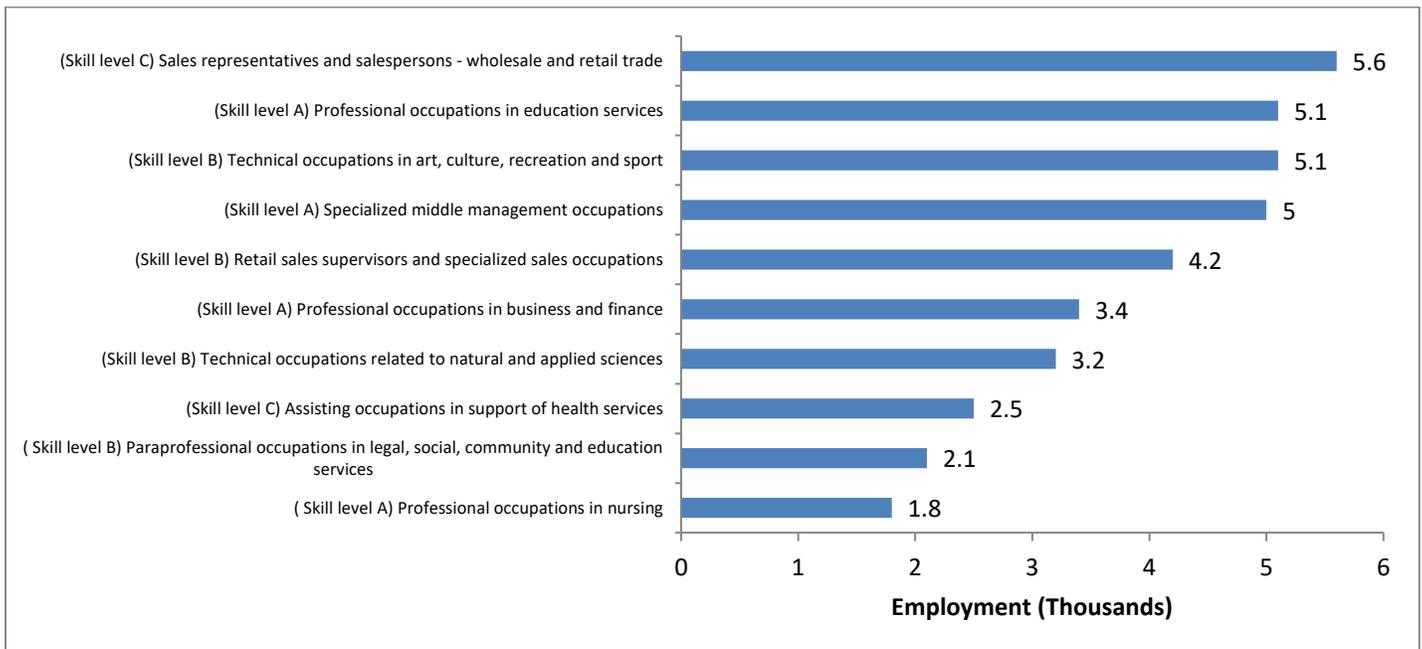
Business Size	Total Change (2015 to 2018)	% Change (2015 to 2018)
1 to 19	1,132	87%
20 to 99	122	9%
100 to 499	42	3%
500+	-2	0%



Highly skilled jobs have seen the most growth

Similar to growth seen in across sectors, many of the occupations that have shown strong employment growth are highly skilled occupations. They also correlate to the top growth sectors of *Health care and social assistance; Professional, scientific and technical services; Finance, insurance, real estate, rental and leasing, and Educational services*. Of the top growing sectors, *Retail trade* has the most entry-level jobs and range of skill levels.

Top 10 Growing Occupations (2-digit NOC), 2014 to 2018, Hamilton (Census Metropolitan Area)



Source: Labour Force Survey

A Closer Look – Detailed Sector Information

The following table provides detailed information regarding the seven industries that saw the most growth in total employment. These seven sectors are critical to Hamilton’s economy employing 70% of the workforce. The table below shows different indicators across the sectors. It shows key information about each sector and highlights some of the challenges including jobs in demand.

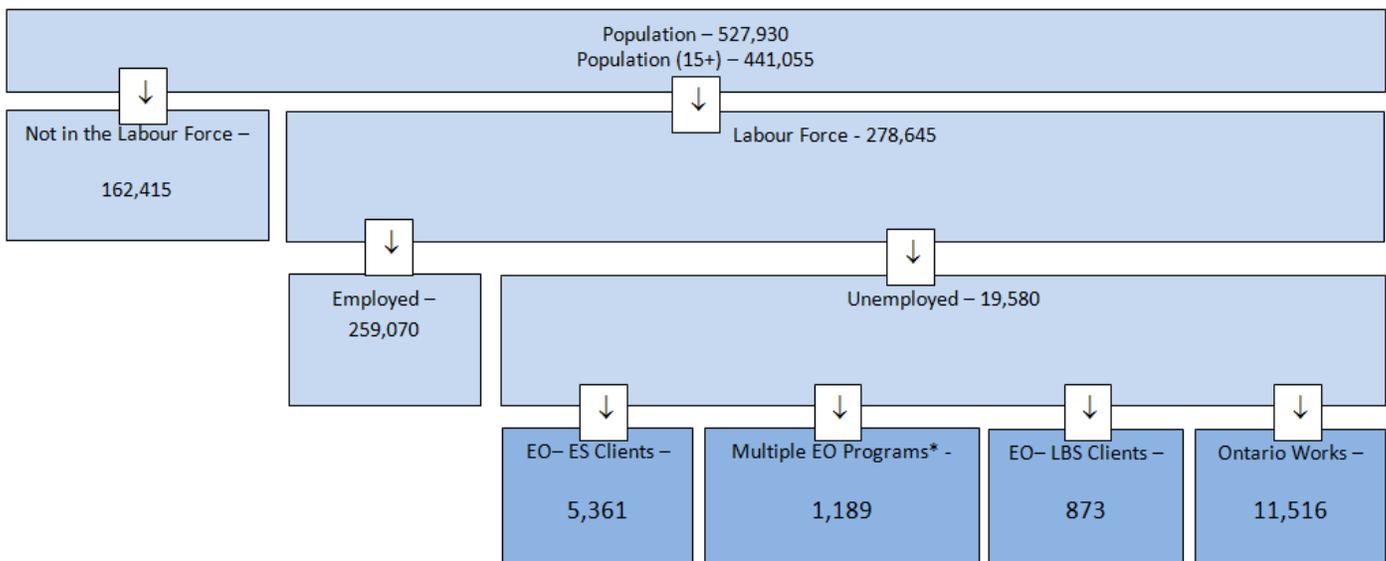
Sector	Number of Jobs	Job Growth 2014 - 2018	Recruitment Very Challenging	Plan to Hire	Jobs in Demand
(NAICS 31 – 33) Manufacturing	48,900	4%	44%	91%	<ul style="list-style-type: none"> Welders Electricians CNC Machinists Industrial millwright/mechanic Machine operators

(NAICS 62) Healthcare & social assistance	54,600	13%	14%	92%	<ul style="list-style-type: none"> Registered nurses Personal support workers Early childhood educators Administrative/clerical workers
(NAICS 54) Professional, scientific, & technical services	35,100	17%	18%	87%	<ul style="list-style-type: none"> IT Technician Software Developer Project Manager Field Technician Intermediate/Senior Developers
(NAICS 41, 44-45) Wholesale and retail trade	67,000	8%	29%	63%	<ul style="list-style-type: none"> Retail salespersons Cashiers Sales associates
(NAICS 52) Finance, insurance, real estate, rental & leasing	27,100	19%	N/A	N/A	<ul style="list-style-type: none"> Financial sales representatives Computer programmers and interactive media developers Other financial officers Customer service representatives
(NAICS 61) Educational services	33,500	14%	N/A	N/A	<ul style="list-style-type: none"> Elementary/kindergarten teachers University professors and lecturers Secondary school teachers Post-secondary teaching and research assistants Elementary and secondary school teacher assistants
(NAICS 51) Information, culture & recreation	21,000	18%	N/A	N/A	<ul style="list-style-type: none"> Program leaders and instructors in recreation, sport and fitness Library assistants and clerks Operators and attendants in amusement, recreation and sport Computer programmers

Source: Labour Force Survey, 2019 EmployerOne Survey

LABOUR SUPPLY

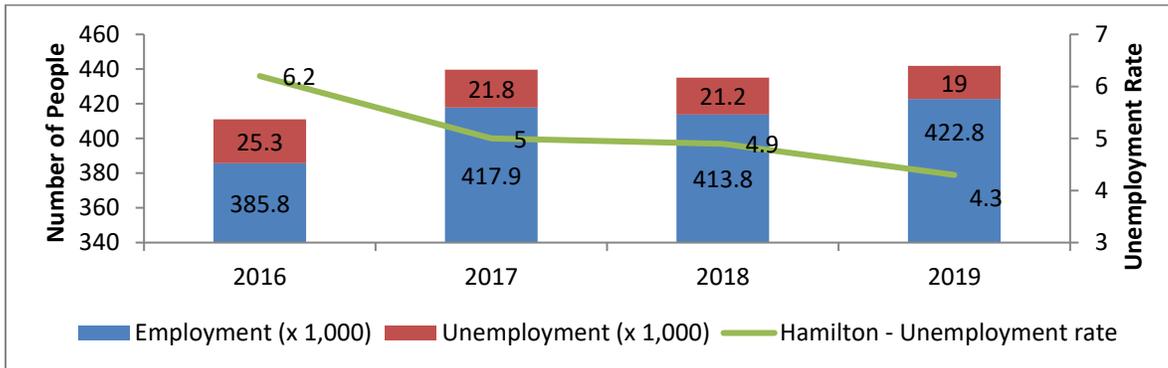
Hamilton Population and the Labour Force



Source: 2016 Census; 2018-19 Employment Ontario data; 2019 Ontario Works data

Workers continue to find opportunities in Hamilton's labour market

Across Hamilton's economy most workers and jobseekers are doing better over the last few years. Unemployment continues to be low for Hamilton, often among the lowest in the province and below the provincial average. Participation rates have improved more recently levelling off at about 65%. However, the youngest and oldest workers are seeing the greatest improvements.

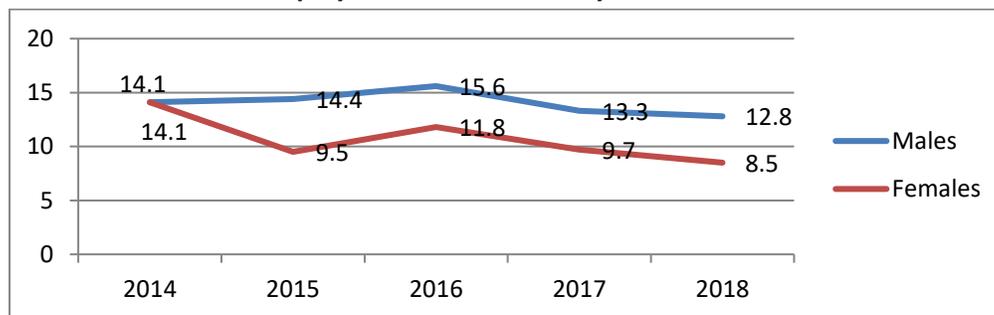


Source: Labour Force Survey

Youth

The unemployment rate for youth (15 to 24 years) has decreased since 2014. It has gone down for both sexes but the decrease has been greater for females. The total number of youth working is 63,000 as of 2018, an increase 13,200 people since 2014. This increase is larger than the increase seen among core-aged and older workers.

Unemployment Rate, 15 to 24 years old, 2014 to 2018, Hamilton (CMA)

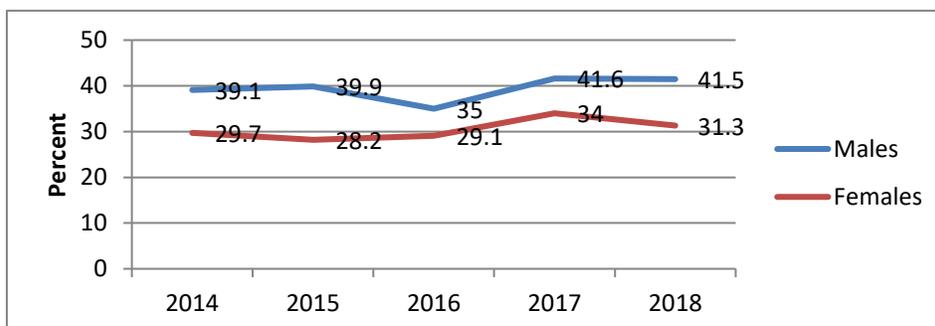


Source: Labour Force Survey

Older workers

Labour force characteristics for older workers (55 years and over) have also improved since 2014. Looking at the employment rate we see that female employment rate increased from 29.7% to 31.3%, and male employment rate increased from 39.1% to 41.5%. This brings the total number of people over 55 who are working to 88,600 in 2018, an increase of about 10,000 workers since 2014. While our EmployerOne survey reveals that retirements are increasing, there are an increasing number of retirement aged workers who continue to be employed.

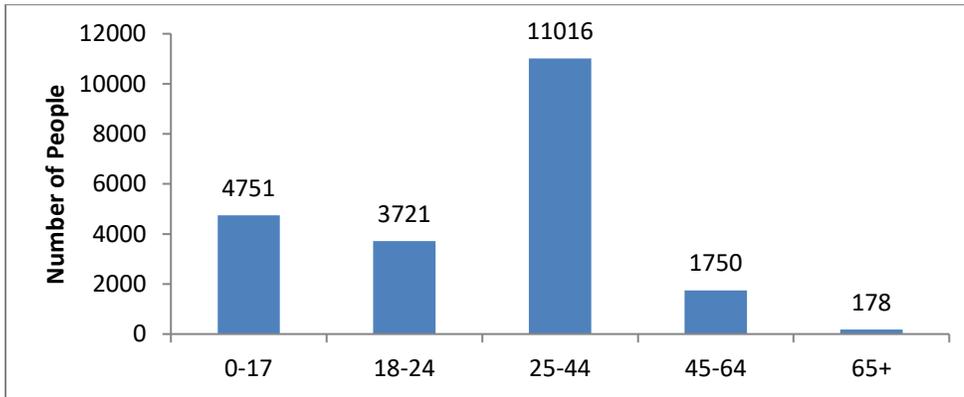
Employment Rate among 55 years and over, 2014 to 2018, Hamilton (CMA)



Source: Labour Force Survey

Core aged workers continue to strengthen Hamilton's labour force

From 2012 to 2017 the net migration of residents to Hamilton increased by 21,416 people. All age groups saw growth, but the most growth was among core-aged workers (25 to 44) with 11,016 people. Year over year we see the core age workers continue to grow.



Source: Statistics Canada, Tax Filer data (2018)

Employment Ontario programs provide support

Employment Ontario programs funded by the Ministry of Labour Training & Skills Development provide programs and services that support jobseekers to their next job. There are eight service providers funded by Employment Ontario in Hamilton with a total of ten locations spread across the city. There are also employment services offered by Ontario Works for OW clients and Immigrant Working Centre for newcomer jobseekers as well as a range of employment services available through indigenous service organization and service organizations supporting persons with disabilities.

The following chart highlights jobseeker participation in Employment Ontario programs in through the 2018 – 19 fiscal years.

2018-2019

Unassisted Clients

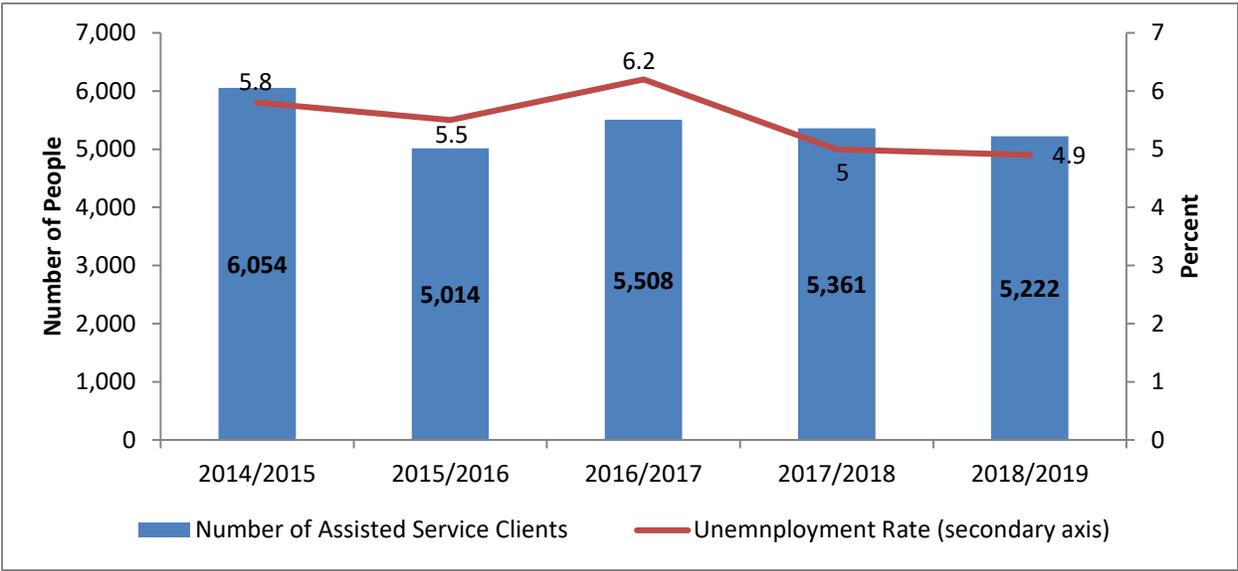
Assisted Clients

17,866

5222

Employment Ontario Programs

Programs	Clients	2014/ 2015	2015/ 2016	2016/ 2017	2017/ 2018	2018/ 2019
Apprenticeship	New Registrations	1,290	1,181	1,011	1178	1327
	Active Clients	4,122	3,928	3,435	3675	3457
CANADA ONTARIO JOB GRANT - EMPLOYER	Number of Employers	N/A	N/A	135	97	123
	Number of Clients	N/A	N/A	605	702	755
EMPLOYMENT SERVICE	Number of Assisted Service Clients	6,054	5,014	5,508	5,361	5,222
	Number of Unassisted R&I Clients	11,979	7,802	13,518	13,165	17,866
LITERACY AND BASIC SKILLS	Number of In-Person Learners (New + Carry-Over)	1,070	999	957	873	636
SECOND CAREER	Number of Clients	284	250	272	240	194
YOUTH JOB CONNECTION	Number of Clients	N/A	N/A	614	391	448
ONTARIO EMPLOYMENT ASSISTANCE SERVICE	Number of Clients	N/A	N/A	605	558	567



Employment Ontario Client Profile Analysis (April 2018 – March 2019)

- ↑Increase in unassisted clients (using resources and computer services). Up 49% in Hamilton compared to Western Region, up 21%
- ↓Small decrease (-2.6%) in assisted clients (using counselling services) in 2018 - 19 (assisted clients)
- ↑Increase in designated groups using services – 18% increase over the last five years – highest in Western Region.
 - Largest increases were among Internationally Trained, Newcomers, and Persons with Disability.
- ↓Decrease in Ontario Works clients
- ↑Increase in Ontario Disability Support clients
- ↑Increase in clients with 'No source of income'
- 1 in 4 clients have been unemployed for longer than 12 months

Ontario Works Client Profile Analysis (March 2018 to September 2019)

- The largest case types are single males (37.3%), female sole support (28.1%), and single female (22.1%)
- 71.2% of clients have been unemployed for more than one year, and 38.1% have been unemployed for three years or more
- The majority are core aged workers, 30 to 54 years of age, 58.9%
- The majority of OW clients have a high school diploma or less, 71.5%. Nearly a quarter of clients have a postsecondary education, 23.8%
- 69% are Canadian born

Case load changes

- ↓Continued decline in the number of OW clients – Caseload declined by 7% to 10,714 cases March 2018 to September 2019. There has been a 15% decline since October 2016.
- ↓Decline in single males by 504 clients or 11% over the previous year.
- ↓Decline in single females by 366 clients or 13%
- ↓Decline in time on assistance among people who have been on assistance less than a year and half. For people on assistance less than 3 months to 17 months by 1066 clients or -20%. Among people on assistance 60+ months the number of people actually went up by 13% over the last year
- ↓Decline was among 18 to 29 years which declined by 501 cases or -14% over the last year.

Employment Ontario Program Highlights

Literacy and Basic Skills

- **↓Decrease in LBS clients for the fifth year in a row.**
 - Over the five year period, the drop has been faster here in Hamilton falling by 41% here compared to -30% across Ontario

Apprenticeship

- **↑Increase in number of apprenticeship registration by 13% year-over-year.**
 - The number of active clients has declined year-over-year (-6%) and over the five year period (-16%) and this was in line with drop across Western region and Ontario as a whole
- **↑Skilled Trades with increased registrations:**
 - Automotive Service Technicians (37 new registrations)
 - Industrial Mechanic Millwrights (26)
 - Ironworker (24)
 - Information Technology (47 new registrations)
 - Tractor-Trailer Commercial Driver (29 new registrations)

Canadian Ontario Job Grant

- **↑Increase in the number of employers using COJG from 97 in 18 – 19 to 123 in the 19 -20**
- **↑Increase in the number of clients benefiting from the program over the last three years from 605 to 755 clients**
 - There were no similar increases in the Western Region or across Ontario

Second Career

- **↓Decrease in the number of clients for the third year in a row**
 - This programs is down 32% over the last five years similar to the Western Region and Ontario

Youth Job Connection

- **↓Decrease in the number of participants over the last three years but an ↑increase year over year to 448 clients.**
 - In the Western region and in Ontario there was no increase year-over-year with YJC program continuing to decline

Ontario Employment Assistance Service

- **↓Decrease in the number of participants over the last three years but an ↑increase year over year**
 - In the Western region and in Ontario there was no increase year-over-year with OEAS program continuing to decline.

COMMUNITY CONSULTATION

WPH engages with key labour market stakeholders through their ongoing work in the community. Our involvement in a range of committees that support economic and workforce development provides opportunities to gather labour market intelligence throughout the year. At the Skills Development Flagship, Job Developers Network, Immigration Partnership Council, Invest in Hamilton Partnership and other meetings we keep our finger on the pulse our local labour market. Through these meetings we learn of the needs, challenges and barriers of particular workforce sectors as well as community initiatives that are in support of workforce development. All of this information helps to shape our action plan for the community.

In addition, primary research through surveys and employer consultation and interviews provide us with rich context to link with the data presented in the first half of this report. The 2019 EmployerOne, with over 300 respondents from a range of sectors and sizes in Hamilton provides valuable information on industries with significant workforce challenges. Also through EmployerOne we are learning about the evolution of skills requirements in Hamilton's more diversified economy. While in the past we have heard a great deal about soft skills requirements we are now beginning to hear of high demand technical skills, everything from foundational math skills to IT skills like computer programming to specialized certifications in healthcare. In the past year our work on the *In demand skilled trades* research highlighted the skills shortages across all skilled trades. Again, this information assists us in shaping an action plan that will align the skills of the workforce with the skills in demand.

Service Provider Consultation – Skills Development Flagship (SDF)

In November WPH met with the SDF to discuss the current state of labour market and understand any particular challenges they are facing in meeting client demand, both jobseeker and employer. There were over twenty participants including the majority of the Employment Ontario service providers. After a brief labour market information presentation we asked those present about their recent experience working with jobseekers and employers. In the previous year, we had learned the service providers had been overwhelmed by employer demand for workers at all skill levels in the face of a decreasing number of jobseekers looking for employment. Over the past year they reported that situation had remained the same. Following are highlights from that meeting.

Job seeking clients: Issues and concerns

- For most providers the number of clients had stayed about the same or only declined slightly. They feel that many are finding employment in the current labour market
- Service providers reported that self-service clients are increasing (this was reflected in the EO data with an increase by 49% of unassisted clients)
- Client needs have increased and many clients are harder to serve with multiple barriers. One service provider noted that 42% of their clients have disabilities. A representative from Service Canada noted that while the number of Employment Insurance recipients have declined, there is an increase in the number of people on sick benefits related to mental health issues
- Among the barriers mentioned by service providers, anxiety about finding and keeping a job is common
- A further barrier is affordable and accessible childcare
- There are concerns about job seeking clients 'ghosting' both employer and service provider appointments. Soft skills in clients continue to need improvement

Comments on employer demand:

- There continues to be high demand for workers at all skill levels
- Employers have high expectations of clients but often offer only minimum or just above wages. Jobseekers are unwilling to take these general labour type positions. The wages are not livable for many clients

- Skilled trades positions are difficult to fill since employers are looking third year apprentices or almost fully skilled workers
- Service providers noted that employers need to take a more active role in supporting their new hires through onboarding and mentorship in the early days on the job

THE 2020 PLAN

The labour market action plan below identifies key priorities based on our work with labour market stakeholders including employers and other partners. These priorities were first established in 2018 and are reconsidered annually to ensure that they reflect the ever-changing labour market dynamics in Hamilton. The action plan is developed annually to reflect of the community. Everyone has a role to play in the implementation of this plan. We welcome your involvement. Please be in touch if you want to support any of these actions.

PRIORITY: IDENTIFY ONGOING AND GROWING SHORTAGE OF SKILLED WORKERS

Continue exploring employer needs to better understand where the opportunities are in our local labour market

Evidence:

All evidence continues to points to tight labour market in Hamilton. The unemployment rate for 2019 was 4.9% in Hamilton. WPH's 2019 EmployerOne survey highlighted the following results:

- 65% of employers identified one or more hard-to-fill positions
- The number of employers identifying recruitment as very challenging increased from 20% in 2018 to 27% in 2019
- Highly skilled jobs are seeing the most growth
- Job postings are on the rise

ACTIONS 2019-20

In Demand Skilled Trades

WPH spoke with 138+ employers and our report provided evidence of the need for skilled trades workers in all trades sectors – industrial, construction, motive power, service. Under pressure 2.0: Heading off a Hiring Crisis in Hamilton's Skilled Trades

EmployerOne 2020

WPH once again conducted its EmployerOne survey with a strong response of over 325 employers highlighting their experience in recruiting in Hamilton. Results pointed to a growing skills shortage with key sectors like Manufacturing, Construction and others indicating the lack of skilled workers.

PROPOSED ACTIONS 2020 – 21

Skilled Trades – Planning for Hamilton's future

Building on our work for the In Demand Skilled Trades research project, WPH will work with key partners to support the development of local strategic actions that improve availability of skilled trades workers in industrial, construction and motive power.

EmployerOne2021

WPH will continue to gather information on local labour market trends and issues through our annual EmployerOne survey. We will look to update and revise the questions to ensure that we are tracking the important trends in Hamilton.

WEMap Job Board for Hamilton

Workforce Windsor Essex has developed the WEMap Job Board ,a valuable job search tool that maps job postings in real time along with services like bus routes and tops, employment services, childcare centres, and training centres. WPH is working to bring this resource to better support employers and jobseekers in Hamilton.

PRIORITY: SKILLS WANTED (OF ALL KINDS)*

Skills of all kinds are needed in the current economy.

*For a number of years we have focused on soft skills, however, in recent EmployerOne results and in our consult with employers we hear more and more about technical skills in high demand. This does not mean that the need for strong soft skills has disappeared but suggests that we need to ensure that job seekers in some cases need both.

Evidence:

- Employers and service providers alike continue highlight the need for soft skills in their new hires and workers. Employers tend emphasize 'good attitude' in our conversations and our EmployerOne survey reveals that 'work ethic' is a top competency followed by 'dependability' and 'teamwork/interpersonal'
- The need for strong technical skills were noted by Construction, Professional Scientific and Technical Services and Manufacturing
- The EmployerOne 2020 featured a section on skills both soft and technical. Early results show that employers from all sectors are equally concerned with technical and soft skill with an almost 50/50 split

ACTIONS 2019 – 20

Skills for Steel – YMCA Hamilton, Burlington, Brantford

This program is funded through Skills Advance Ontario (MLTSD), to support the acquisition sector-specific skills for entry level positions in the Manufacturing sector focusing on the steel sector. The curriculum is employer-informed and includes both soft and technical skills for pre-screened jobseekers. Early results through four cohorts show that this program is successful.

PSW and Child Development Practitioner – Mohawk College

Food Industry Sector – Goodwill

Skills Advance funding is also anticipated for programs in these areas

RECOMMENDED ACTIONS 2020 – 21

Skills for the Future Forum

"No matter how the data are sliced, however, information about skill requirements is the most salient type of LMI sought by clients and career practitioners" (Labour Market Information Council). With this in mind WPH will host a forum that will provide half day interactive session that will feature workforce/labour market experts presenting different perspectives on skills in our evolving labour market. It will include an opportunity for consultation with participants to hear their perspective.

PRIORITY: ADDRESS CAREER EXPECTATIONS AMONG JOBSEEKERS

Consider strategies to remediate unrealistic job expectations among jobseekers about career advancement and workforce conditions

Evidence:

- Employers and service providers both identify this as a challenge among jobseekers. Youth and new immigrants are often identified when discussing this issue

ACTIONS 2019 - 20

Mobilizing our workforce: Understanding the Long-term Unemployed

While overall the number jobseekers who are considered long-term unemployed have been improving, WPH noted that over two thirds of Ontario Works clients have been on assistance for more than three years. Our research report looked at what the literature told us about the complex barrier experienced by LTU. We also conducted an online survey with over 100 local OW clients completing it to better understand their concerns and issues and using data from the City developed a profile of this client group. We examined best practices in assisting these clients back into the workforce. The final report offer recommendations on next steps.

Job Satisfaction Survey

In a time when some employers are struggling with retention, the goal of the Job Satisfaction Survey was to better understand what motivates employees to stay in a job or consider leaving a job. What do they value in a workplace? WPH heard from 380 workers both employed and recently unemployed. Perhaps unsurprising is the fact that compensation is important but in the category of workplace culture things being recognized and valued is also important. The final report offers valuable information for employers about what is important when considering how to and what will engage and retain their workers

PROPOSED ACTIONS 2020 - 21

Best practices in retention: Case studies

See project outlined below in the priority *Encourage and promote best practices in recruitment and retention to SMES*

PRIORITY: ENCOURAGE AND PROMOTE BEST PRACTICES IN RECRUITMENT AND RETENTION TO SMES

Share information and resources with SMEs to support better HR management

Evidence:

- Small employers often lack the resources to be good HR managers
- Service providers note the fact that many small employers need to be reminded of employment legislation and other good practices in hiring and retaining workers
- EmployerOne identified that the number quits are increasing year-over-year
- EmployerOne notes that especially among small employers 2/3 do not have a succession/workforce plan

ACTIONS 2019 -20

Employer Recruitment and Retention Toolkit

WPH developed a guide that provides information on best practices in recruitment, retention and onboarding to ensure a successful hire and integration process. The focus of the guide is small- to medium-sized employers and it was designed to showcase simple best practices along with templates and ideas for implementation.

Hire Local: Reverse Job Fair

The goal of this event targeted at employers was to showcase the free employment services available in Hamilton and highlight another source for talent in our community. The event was held in late April with representation from a range of service providers and participation from close to 50 employers. In addition to service provider booths, the morning event featured a keynote presentation by an HR specialist on the latest trends in recruitment as well as pop-up presentations on the Employment Standards, diversity and inclusion in the workplace, AODA requirements and government incentives available for hiring.

PROPOSED ACTIONS 2020 - 21

Best practices in retention: Case studies

Based on consultations with employers, service providers, and the Job Satisfaction Survey, we know that some employers are having problems with turnover. While we know that pay and benefits are important for workers, it is also important for workers to feel connected to their workplace and to have all their skills and abilities utilized. To better support employers needing retention supports we will develop a series of case studies that highlights best practices in retention.