



BC ALLIANCE
FOR MANUFACTURING



BC APPAREL
SECTOR LABOUR MARKET PARTNERSHIP

WORKFORCE STRATEGY
Including Sustainability Plan and
Evaluation Framework

August 2017




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The views and opinions expressed in this report are those of its author(s) and not the official policy or position of the Government of British Columbia.

ACKNOWLEDGMENTS

The BC Apparel Sector Labour Market Partnership is an industry-led initiative to better understand and respond to the skills shortages faced by the industry during a period of unprecedented growth.

This report is the third in a series as part of a sector labour market partnership; a collaborative effort between industry, post-secondary institutions and government. The main goal of this report is to present a strategy to minimize and eliminate the impacts of the identified skills shortages.

This report would not have been possible without the deep contributions of several stakeholders who all wish to see the province's Apparel Industry continue its upwards growth trend.

First, the federal and provincial governments have provided the bulk of the funding to make this exercise possible through the Canada BC Labour Market Agreement.

Second, many business and post-secondary institution leaders contributed hundreds of hours of their time and many ideas through participation in four different working groups and other meetings. Two members, Eric Kazenbroot and Lexi Soukoreff, deserve special recognition for their additional contributions to this document.

Third, the members of the Steering Committee, who over the last two years, have kept this project on track with their guidance and advice.

Fourth, the members of the interim board of the new BC Apparel Association who have taken on an active role in advancing this initiative and contributing additional industry insights.

Last but not least, to the project team encompassing individuals from the BC Alliance for Manufacturing and Prism Economics and Analysis.

This report completes the planning phases, which means the exciting implementation phase can begin before the end of 2017.

Many thanks to all who have contributed,

Marcus Ewert-Johns

Chair

BC Alliance for Manufacturing



INTRODUCTION

1 INTRODUCTION

1.1 PURPOSE

A Sector Labour Market Partnership (SLMP) is a collaborative effort between industry and government to identify and address labour market challenges in a priority sector important to British Columbia's economy.

Sector LMPs have five phases:

1. Sector Engagement
2. Labour Market Information
3. Strategy Development
4. Strategy Implementation; and
5. Evaluation

This is the Phase 3 report.

The key purposes of this report are to provide Government with:

- An explanation of how the apparel sector was consulted for purposes of strategy development;
- A listing of members of the governance or steering committee and each of the thematic working groups;
- Detailed goals, objectives and specific tactics that will be undertaken in Phase 4 to address the labour market issues identified in the BC Apparel Labour Market Information Research Report from September 2016 (Phase 2);
- Business plans that deliver on the strategy. The goal is to show that any initiatives funded through seed funding from government, industry and post-secondary institutions can generate enough revenue to be sustainable in order to support solutions for industry through the year 2021 and beyond;
- An evaluation framework, respecting the guidelines of the Sector Labour Market Partnership program, so that success criteria are clearly defined and the partners can later determine if their joint investment had a positive impact on reducing workforce challenges faced by BC's Apparel Industry.

1.2 CONTEXT

The BC Apparel Manufacturing sector is diverse and includes approximately 7,600 jobs across a wide variety of sub-sectors related to the design, manufacturing and distribution of premium and performance apparel, footwear and select accessories. The industry includes 436 firms with more than 25% having fewer than 4 employees. Only 14 firms have more than 100 employees and 3 have more than 500 employees¹.

The sector has been experiencing significant growth since 2010 and 66% of the Apparel Industry believes their workforces will continue to grow towards 2025. The Industry projects a minimum of 11,350 jobs, a 48.5% increase from 2016.

Industry consultations and research conducted during Phase 2 of the BC Apparel Sector Labour Market Partnership (SLMP) showed that forecasted labour and skills shortages are the biggest competitive threat for the sector. These shortages exist at all levels (leadership, professional and skilled trades) but are particularly acute for nine priority occupations. The most significant of these nine occupational shortages is that of industrial sewers.

In response to the findings of the BC Apparel Labour Market Information Research Report, the key product of Phase 2, the BC Alliance for Manufacturing is working with the Apparel Industry to develop a strategy to address these workforce shortages as well as to enhance the skills and knowledge required for the Apparel Industry to grow and thrive.

The strategy will focus on four key areas of concern to the Apparel Industry, including:

- increasing industrial capacity,
- increasing availability of specialized skills talent through immigration,
- expanding youth awareness of opportunities, and
- strengthening post-secondary institutions alignment with industry.

A dedicated working group was established for each theme under the broader governance of the Apparel Sector LMP Steering Committee.


Industry stakeholders also identified the need for a dedicated industry body to advance these projects. A fifth group, independent from the SLMP, established itself to resurrect a BC Apparel Association.

In addition, a small group of CEOs continue to meet on a larger cluster initiative covering topics beyond workforce skills.

1.3 BACKGROUND AND VISION

In 2014, a small group of CEOs from Arc'teryx, Aritzia, lululemon and MEC, in partnership with the BC Alliance for Manufacturing (BCAFM), started to collaborate on addressing common issues impacting BC's Apparel Industry. Primarily, this included addressing increasing skilled labour shortages, but also looked at innovation, supply chain and global branding topics.

¹ BC Apparel Industry Market Partnership Labour Market Information Research Report, September 2016



The vision is to establish Greater Vancouver as a Global Centre of Excellence for Performance and Premium Apparel. The expectation being that a global cluster requires sufficient talent, infrastructure and interconnectedness between companies and post-secondary institutions in order to attract other global apparel firms to locate offices, design centres and production facilities in the city.

In 2015, the BCAFM, with the support of the Government of British Columbia, initiated a Sector Labour Market Partnership (SLMP) project to address common workforce challenges in the Apparel Design and Manufacturing sector.

The first phase of the project, which lasted from September to December 2015 was the engagement phase. Its objectives were to identify stakeholders, build awareness for the project and develop terms of reference and a governance structure.

The second phase of the project, the labour market information (LMI) phase, ran from February 2016 to September 2016. The goals of this phase were to survey industry and collect data to build a profile and identify skilled labour challenges. This information would provide industry and government policy makers with current and accurate labour market data.

The findings in the Phase 2 report were clustered around five main themes:

1. Post-secondary institutions' relationship with industry and alignment with industry needs must be strengthened;
2. Sewing capacity needs to be improved to support sample production and production of large orders;
3. The role of immigration needs to be expanded to help firms fill specialized skills as local talent supply is constrained;
4. Youth need to be made more aware of the diverse career opportunities that exist within the Apparel Industry; and
5. Industry needs a central coordination body, an industry association, so stakeholders can have a common strategy and path forward.

More information on the findings from Phase 2 are included in Appendix C.

The third, and current phase of the project, is utilizing the LMI data to develop strategies to address some of the labour market challenges identified in Phase 2.

A dedicated working group was established for each of the first four themes under the broader governance of the Apparel Sector LMP Steering Committee. An independent group is looking at the fifth theme outside of the context of the Sector LMP.

The groups met through March and April of 2017 to identify areas warranting further exploration and validation. These ideas are presented in this report.

In June 2017, the working groups also reviewed and discussed a jurisdictional best practice report. This report identified how other apparel jurisdictions in Canada, the USA and Europe are overcoming some of the same challenges being faced by BC's apparel cluster.

1.4 CHALLENGES

A number of issues delayed the launch of Phase 3, all of which impacted engagement to some degree.

First, there was a 5-month time lag between the end of Phase 2 and the beginning of Phase 3. This led several industry participants to surmise that the project had ended. However, participants were kept engaged through a number of e-mail campaigns seeking volunteers for the working groups and presentations on the Phase 2 findings.

Second, the publication of the Phase 2 report, which was completed in September 2016, was also delayed a number of months meaning it was not publicly available to stakeholders who were not directly involved in the steering committee. When the report was finally released, it was published on the Work BC website without a broader media campaign. Industry observers felt that this inadvertently reinforced the belief that the project was not continuing. To counter these sentiments, when the report did become available for public release, it was emailed to stakeholders in two separate campaigns, posted on additional websites and referenced on social media.

Third, up until this point, there was relatively little online presence related to the Apparel Sector LMP and participants did not have a place to direct interested parties to seek out further information. A project website was launched to correct this perception and regular updates published.

Fourth, the shift in time-period from the Autumn of 2016 to the Spring and Summer of 2017 placed a number of businesses in a period where they were extremely busy. It also shifted the project to a period of many holidays like Easter and Spring Break which meant many participants were travelling, not allowing them to participate in person. Unfortunately, this also pushed the later period of the project into summer, when longer stretches of holidays made it harder for participation. Overcoming these challenges was attempted by shifting from face-to-face to electronic meetings.



2

GOVERNANCE

2 GOVERNANCE

The Steering Committee from Phase 1 and Phase 2 continued into Phase 3 as the oversight body for the BC Apparel Sector Labour Market Partnership.

The Steering Committee consists of the following 12 representatives:

The Steering Committee Members					
Name	Organization	Title		Organizational profile	
Laura Appleton	Arc'teryx	Manager, Talent Acquisition	Performance	Large	North Vancouver
Virginia Beltjens	White House Design	VP, Operations	Premium	SME	Burnaby
Amy Frankel	Aritzia	Co-General Counsel	Premium	Large	Vancouver
Laura Jaeger	lululemon	Manager, Global Mobility	Performance	Large	Vancouver
Eric Kazenbroot	Peak Apparel	Owner	Manufacturer	SME	Delta
Alex McAulay	Kosan	Founder	Manufacturer	SME	Surrey
Sarah Murray	VCC/Fashion Week	Program Coordinator	Education	Post-Secondary	Vancouver
Jeff Penner	Minimoc	Co-founder	Specialty	SME	Victoria
Julie Robb	MEC	Director, Recruitment	Performance	Large	Vancouver
Carolyn Robertson	KPU	Dean	Education	Post-Secondary	Richmond
Tracy Ryder-Glass	UFV	Dean	Education	Post-Secondary	Abbotsford
Alan Yiu	Westcomb	Creative Director	Performance	SME	Vancouver

The Committee met four times during Phase 3.


They formally met for the first time, on April 24, 2017. The topic of this meeting was primarily related to engagement. As the Steering Committee had been established for more than 18 months, members discussed the potential for renewal or a refresh. Work obligations were impacting Committee members and two members made the choice to step down. This created an opportunity for the Committee to try and recruit additional representation from more Small- Medium Enterprises (SMEs) or manufacturers.

The Committee also met on July 24, 2017 to review the draft Sustainability Plans and Evaluation Frameworks. The draft Phase 3 strategic initiatives for apparel are complex and involve a number of ambitious goals. The feedback from the Committee was to identify dependencies between the elements more clearly and then prioritize the strategies in order of urgency. This would ensure that the items that would have the greatest impact for industry would be achieved first. Others observed that the time lines should be extended where possible so project teams are not overwhelmed.

It was also suggested that representatives of the BC Apparel Association be integrated into the Steering Committee for the next phase. The three non-overlapping individuals listed in Section 3.6 were invited to the August meeting.

The Committee met on August 23, 2017 to review and discuss the draft Final Report. The Committee requested changes to prioritization of strategies so sewing was not as prominent. They also asked for further extensions of timelines. The changes were made and the Committee subsequently met on September 1, 2017.

At this meeting, a further extension was requested to allow the Committee more time to review the document and to provide additional feedback. No additional feedback was received and the approved report was submitted on September 14, 2017.



The Steering Committee, thinking ahead to Phase 4, would like to explore including additional members who have more experience governing projects related to the strategies proposed below. The search for additional committee members is underway in anticipation of Phase 4.

All Steering Committee members were also involved in one of the four working groups detailed below.



INDUSTRY INPUT

3 INDUSTRY INPUT

Input for potential solutions to the workforce challenges came from two primary sources. First, ideas were solicited from industry via a series of working group meetings. Second, input was gleaned from a survey of peer apparel clusters in Canada, the USA and Europe. This report came about from research, interviews and visits.

3.1 WORKING GROUPS

Working Groups provided input in three stages.

Stage 1 related to strategy development focusing on the main themes identified in Phase 2, including:

- The role of post-secondary institutions and training alignment
- Resolving industrial sewing capacity
- Immigration for specialized skills
- Improving youth engagement and diversity

A dedicated working group was established for each theme. The groups met through March and April of 2017 to identify areas warranting further exploration and validation. They explored potential solutions to the four key areas of concern to the Apparel Industry stakeholders. These ideas are presented below.

In Stage 2, the Working Groups met in June 2017, to review how their group's particular strategy could be updated to reflect further dialogue, ideas and findings presented in the peer jurisdiction review, and subsequently how all the strategies fit together.

In Stage 3, the Working Groups also provided feedback in July and August 2017 on the Sustainability Plans, Evaluation Framework, and the draft Final Report.

3.2 GROUP 1 – The Role of Post-Secondary Institutions

MANDATE

The mandate of the first working group was to explore how to build stronger relationships between industry and post-secondary institutions, ultimately to improve the type of training offered by post-secondary institutions to meet the needs of the Apparel Industry.

This is the result of a number of findings in the Phase 2 report. First and foremost is the perceived disconnect between post-secondary institution programs and industry needs. There was little agreement from industry that post-secondary programs provide the right skills for job-seekers.

There was also some sentiment from industry that the programs offered at international colleges are of a higher caliber and produced better qualified graduates sought by the local apparel firms.

On the other hand, it was felt by post-secondary institutions that the programs must align with industry needs since employers hire most of their graduates and participate in program advisory committees.

Further, post-secondary institutions observed that employers offered little consistency of standards for internships, co-op terms and work placement activities, resulting in an uneven experience for students.

It was also noted by employers that innovative research and development performed at post-secondary institutions was not always linked to the local apparel cluster and instead relevant partnerships were being established with firms outside of British Columbia.

TOPICS OF EXPLORATION

The group was posed with a number of questions:

- What skills are required by the specialized positions indicated in the 10-year growth plan?
- How do current curricula and training programs align with industry needs?
- In what ways could post-secondary institutions alter their Program Advisory Committees (PAC) to better influence curriculum changes and gain insight from industry?
- What elements exist in international programs that could be replicated locally?
- Should BC post-secondary institutions explore a textile science program?
- How can post-secondary institutions feeder paths be created within BC’s high-school structure?
- How can post-secondary institutions improve dialogue and strengthen relationships with industry?
- How can post-secondary institution innovations be better linked to industry?

COMPOSITION

Working Group 1 comprised a dozen individuals from post-secondary institutions and industry, as well as certain government support agencies.

Name	Organization	Title	Category
Mary Boni	Lasalle College	Director	Post-Secondary
Shirley Calla	KPU	Faculty Member	Post-Secondary
Kathy Bolton	White House Design	Creative Director	SME
Hélène Day Fraser	Emily Carr	Faculty Member	Post-Secondary
Tara Findlay	Arc'teryx	Manager, Fit and Pattern Engineering	Big 4
Andrea Korens	VCC	Program Coordinator Fashion	Post-Secondary
Janice Larsen	Syte Industries	Technical Consultant	SME
Sara Nathanson	Aritzia	VP, HR	Big 4
Carolyn Robertson	KPU	Dean, Wilson School of Design	Post-Secondary
Jerome Rodriguez	ITA BC	Manager, Industry Relations	Post-Secondary
Toby Russell	MEC	Product Development Manager	Big 4
Tracy Ryder-Glass	UFV	Dean, Professional Studies	Post-Secondary

Invitees from the Province of British Columbia’s education related ministries were invited as observers but were unable to participate. The SLMP Project Manager participated when possible.

This working group formally met on March 9, April 18 and June 15, 2017.

IDEATION

In the first meeting, group members raised a number of ideas to help strengthen the relationship with employers.

There was a lot of discussion around building an inventory of alumni to help educate employers about where their staff originate. Group participants also felt that Human Resources departments within apparel companies are not always aware of changes happening in the industry and may simply be hiring for traditional needs. There was a sentiment that internal disconnects between line departments and the C-suite could be contributing to misalignment as initiatives may not be communicated to post-secondary institutions through the program advisory committee (PAC) participants.

Educators felt that pre-college awareness is important and it is critical to engage youth and create pathways to feed post-secondary programs. One frequent suggestion was to establish an apparel focused initiative similar to Youth Training in Trades and Youth Working in Trades. This would help sensitize students to the industry and the opportunities within the industry.

Some participants raised the need to create a local incubator to help graduates, who do not want to work for other employers, grow their own companies and become leaders.

Employers in the group raised a number of topics. First, training programs need to include learning about new technologies. Second, there is an expectation that given the lag between education and employment that training needs to be done for skills or tools that do not yet exist. Participants observed that training programs thus need to focus on soft-skills such as “versatility” and “resourcefulness” to ensure students are better equipped to think and problem solve.

Employers also stressed the importance of international experience as they globalize and would like to see how this could be incorporated into a diploma or degree program.

During the second meeting, group members chose to focus more on improving the relationship between post-secondary institutions and industry. It was felt that curriculum updates would naturally flow from a strong partnership.

One idea was to develop and host a focused forum, or symposium, for post-secondary educators to hear from industry on where the industry is headed and what training requirements will exist. Emily Carr gave an example on additive manufacturing where they have been able to bring together industry, post-secondary institutions and students in an on-going series of events.

This idea, dubbed the Super PAC, if not done independently, could be interlinked with Apparel Camp, an industry forum hosted in September, or Vancouver Fashion Week, hosted in March. The Super PAC Forum would occur the day before these events to allow for dedicated and focused discussions. A private, closed door meeting of CEOs could be hosted by the Deans before the more-open Forum commenced with a larger group of educators and employer representatives.

The second idea to receive continued discussion was building an employment hub. This would streamline post-secondary institutions interaction with employers on intern programs, co-ops and mentorships by improving job placements through a central hub.

A new topic was raised in the second meeting related to strengthening commitment from industry to support common initiatives. It was suggested that a Commitment Charter be developed to encourage engagement and support from the employers.

3.3 GROUP 2 – Resolving Industrial Sewing Capacity

MANDATE

The mandate of the second working group was to identify ways to increase the number of industrial sewers in the local apparel workforce. The industry is facing an acute shortage of at least 3,000 sewers over the next 8 years. In fact, during the period that these working groups were hosted, four sewing factories closed in Vancouver for lack of sewers. The fabrication component of Industry is having a tough time maintaining production for clients but also producing samples for new designers.

The industry is facing the fact that most sewers in the workforce are former immigrants and no other source of skills development was pursued over the last couple of decades. Now that sewers are retiring, no local labour pool exists to fill vacancies.

TOPICS OF EXPLORATION

The group was posed with a number of questions:

- What steps could be taken so that critical sewing jobs in BC are preserved?
- Who should be targeted for these jobs? How should they be targeted?
- Can a desirable career path be created to help attract potential workers?
- Is this effort helped if we expand the role beyond sewing?
- Would industry be well served by a standardized Industrial Sewer curriculum?
- Would industry benefit from an Industrial Sewer certification or apprenticeship program?
- Should immigration programs be explored to help fill large skills gap?
- Should technology implementation (robots?) or productivity programs (Kaizen? Lean?) be explored to mitigate shortage of skilled workforce?

COMPOSITION

Working Group 2 was comprised of a dozen individuals representing large and medium sized firms that produce locally, as well as design firms who contract out their production to local third-party factories. The social benevolent organization, Threadworks, is also represented in this group.

Name	Organization	Title	Category
Chloe Angus	Chloe Angus Design	Owner/Designer	SME
Melanie Conn	Threadworks	Program Manager	NFP
Asadeh Hessami	Threadworks	Program Manager	NFP
Keith Cotman	Arc'teryx	Factory Manager	Big 4
Ying Ying Hu	Syte Industries	Vice-President	SME
Eric Kazenbroot	Peak Apparel	Owner	SME
Bal Lallu	Advantage Labels	Owner	SME

Irene Li	White House Design	VP, Product Development	SME
Patty Nayel	Pure Magnolia Gowns	Creator	SME
Jeff Penner	Minimoc	Owner	SME
Vladimir Rincon	Vertical Suits	Owner	SME
Lexi Soukoreff	Daub+Design	Owner/Designer	SME
Tony Tam	Arc'teryx	People and Culture Partner	Big 4
Alan Yiu	Westcomb Outwear	Owner	SME

Eric Kazenbroot of Peak Apparel, who is also a production manager, liaised with an additional group of factory owners, primarily former immigrants from Asia, who were too busy at their factories or felt that their knowledge of English would not allow them to communicate effectively in the meetings. Eric was able to bring forward their collective input.

The SLMP Project Manager from the Government of British Columbia participated when possible.

This working group formally met on March 7, April 12 and June 13, 2017.

IDEATION

In the first meeting the group recognized that there is, unfortunately, poor awareness of the Apparel Industry amongst job-seekers. As a result, high school graduates are not likely aware nor interested in pursuing the more technical roles like sewing. Industry would like to work with secondary schools to improve awareness of the jobs available, however, there was strong sentiment that only a limited number of students, and Canadians more generally, would be interested in these types of careers. By default, it is assumed that industrial sewing is outsourced to Asia or a career path for those who recently arrived in Canada.

An additional challenge with immigration as a significant source for production employment is the absence of proficient English language skills. Employers are mitigating this by pre-training employees in English before they arrive and providing language training during the work day. Other employers feel it was more efficient to have translators available in the factories or on call to help them communicate with staff. Certain employers have benefitted from multi-lingual supervisors.

The federal government has stated that it is supportive of pre-arrival training and industry wondered if there was an opportunity to create a program that could train sewers overseas for available jobs in Canada. This would not only allow pre-validation of the technical skills but also permit sufficient time to train in English language and Canadian safety practices.

Employers were hopeful that local training programs could entice enough of the existing population to pursue apparel production careers like sewing. Participants suggested exploring training for unemployed, under-represented and other groups such as home-makers wanting to return to the workforce.

There are currently at least two different introductory curricula being used by local training organizations. Employers that hire directly also have their own unique and detailed training materials. National and international organizations also publish curricula for various manual skill levels. Unfortunately, there is no common approach to develop the necessary skill-sets to more broadly benefit BC's modern Apparel Industry.

Whether the training occurs locally or overseas it was agreed that industry needs a common core curriculum and industry certification for Industrial Sewers to ensure that all colleges and private trainers are training to the same core skill set. Employers talked about a multi-level framework similar to a trade apprenticeship that could help provide a career path showing technical and professional growth. It was thought this could include Sample Sewer or Design Sewer as extra levels.

In subsequent meetings, the employers suggested that in the short-term it would make more sense to shorten standardized training in order to get as many people with foundational skills into the existing vacancies as quickly as possible. They could then learn more advanced skills on the job.

The introduction of technology or training to improve productivity was briefly discussed. With respect to the introduction of new machinery or technology, group members shared that this would only work in factories that were producing standard products in large volumes. Given the nature of the industry many of the productions runs are lower volume and highly customized. Factories stated that they might produce over 300 different designs in a season which requires flexibility enabled by more human labour. Group members also felt that the labour problems were so acute that filling the vacant positions should be the priority. The group felt that introducing skills-upgrading training or programs to rationalize or streamline processes could come later.

It was also noted by this group that Canada Goose and other apparel employers in Manitoba have benefitted from support provided by the Government of Manitoba. The applicable ministries in Manitoba confirmed they had used programs like job grants to establish dedicated training programs to improve employability of new immigrants, under-employed or unemployed. To date, no specialized or targeted provincial immigration programs specific to a company or industry exist.

3.4 GROUP 3 – Immigration for Specialized Skills

MANDATE

The mandate of the third working group was to explore how immigration could be used to alleviate the pressure for needed specialized skills in the Apparel Industry.

The group dealt with topics for staffing several groupings of key occupations where little to no available talent exists in local labour pools. First, seasoned executives with multi-national experience are required in small numbers as business leaders to help the apparel companies continue their exponential growth and global expansion. By their very nature, C-Suite leaders with global apparel experience are in limited supply. Second, businesses also need mid-level professionals in large numbers for areas diverse as design, engineering, supply chain, and e-commerce given the local labour pool has been fully engaged. Companies need these skills immediately and cannot wait for individuals to pass lengthy training programs and gain more than a decade of experience. In some cases, it cannot be expected that training locally could fill these specific and niche skill needs. Third, technical and trades positions are also facing critical vacancy levels. Not only may these jobs be less appealing to today's youth, there is also very little local training available to teach job-seekers these skills. For a business to be successful, all types of positions are required because they work in a harmonious ecosystem running the range from design and manufacturing to global retail and e-commerce.

The rapid growth of the industry in the province has pushed vacancy rates to such significant levels that they are now competitive barriers to growth. Available workers are employed. Even though some post-

secondary and technical training programs exist, the programs do not produce a sufficient number of graduates in a timely manner. It was also noted that the scope of programs available in Canada (textile science, performance design and merchandising) are not always equal to those in competing jurisdictions. Many vacant positions also require several years of work experience. As a result, available skills and experience remain in short supply. Immigration is one of the only ways left to fill immediate skills gaps, especially for seasoned and experienced professionals, and it remains an important tool required by employers to fill strategic vacancies.

Immigration is usually seen as a last resort to fill jobs. Furthermore, many employers without human resource departments see immigration bureaucracy as a long and complicated process beyond their limited internal capabilities.

TOPICS OF EXPLORATION

The group was posed with a number of questions:

- What immigration advantages do competitors in other provinces or countries have over businesses in British Columbia?
- Are Canada’s and BC’s current immigration programs meeting the needs of the Apparel Industry?
- What works better – permanent residency or work permit?
- Does the Apparel Industry require a specialized express entry program specifically for critical apparel roles?
- If so, what roles or occupations should be included?
- For skilled-trades, is there potential to focus on pre-arrival training?
- How can SMEs be helped with integration and settlement?

COMPOSITION

Working Group 3 was comprised of eight individuals representing large and medium sized firms that depend on immigration to fill critical vacancies at the upper management level, middle professional levels or trades and technical areas.

Name	Organization	Title	Category
Laura Appleton	Arc'teryx	Talent Acquisition & Development Manager	Big 4
Virginia Beltjens	White House Design	Corporate Sales Manager	SME
Amy Frankel	Aritzia	Co-General Counsel	Big 4
Laura Jaeger	lululemon	Global Mobility Manager	Big 4
Eric Kazenbroot	Peak Apparel	Owner	SME
Julie Robb	MEC	Director, HR	Big 4
Jason Viberg	Viberg Boots	Manager of Quality Control	SME
Stephen Wilson	Syte Industries	Director, Business Development	SME

Invitees from the Government of British Columbia’s immigration programs department did not participate. Input on government’s immigration programs was provided from an immigration consultant and lawyer who participated as an observer. The SLMP Project Manager participated when possible.

This working group met on March 10, April 20 and June 20, 2017.

IDEATION

Discussion touched a number of topics but generally followed a tight group of themes.

First was that immigration used as a solution would need to be multi-track as it is targeting different skills levels in very different numbers. For example, only a small number of executives are needed while a large group of high-skilled technical professionals and a few thousand sewers are required. It was also noted that if sufficient training and recruitment programs could be established then immigration could also be viewed as a short-term fix to satisfy the immediate and significant staffing shortages for entry level positions. This would buy more time to establish programs and build demand amongst the next generation of potential workers to consider careers in apparel over the next 10 to 15 years.

With respect to the executive and professional levels, group participants were hopeful that the new federal Global Skills program would address their needs. During the working group sessions, not a lot was announced about the program and it was believed that only NOC 0 and NOC A levels would be included. However, for the industry to function well there are a number of NOC B and C roles included in Global skills. It was decided that formally seeking inclusion of these extra NOC categories in the Global Skills program would be a good initiative. However, some also felt it would be best to see how Global Skills evolves before contemplating any immigration specific projects or initiatives.

In July 2017, conversations were held with the federal government and their Global Skills preferred referral partners. It was determined that apparel companies could possibly qualify to use Global Skills under Stream A. This could potentially allow the sourcing of textile developers, IT functions and executives.

The representatives of the manufacturers were supportive of Group 2's idea to explore pre-arrival training for the lower skilled positions. It was felt if the initiative was done right then it could speed up workforce entry.

The group is interested to explore a pilot program that would fast track the arrival of industrial sewers. The program could assess and validate skills of overseas sewers utilizing the Industrial Sewer Certification discussed by Group 2. In order to take advantage of the timelines it was also felt that performing some pre-arrival English language, safety and settlement training could be completed in parallel to the processing of work permits. This would potentially improve workforce entry and reduce settlement barriers upon arrival in British Columbia. Work permits were the preferred "visa" so that program participants would remain attached to a job for a period of time before they could seek permanent residency. Several employers stated that many higher-skilled individuals come to Canada for a job while the lower skilled workers are seeking better quality of life and employment. The observation was not everyone wants to become Canadian.

Lastly, it was noted that the larger firms who have human resource departments and experience working with immigration programs fared better in hiring. They use immigration law firms to bring international talent sourced from their internal recruiting teams. Many of the challenges the larger firms face are related to the bureaucracy of prescribed advertising, slow processing timelines, and lack of flexibility for promoting foreign talent. There is room for collaboration with the federal government to recognize the apparel industry and the unique mix of talent required. As many of the apparel businesses are small and medium, many lack human resource departments and expertise in managing immigration applications. Some companies felt that a shared immigration resource would be of help given the large-scale need

across the industry. There is potential for the Apparel Industry to implement a program with elements similar to the Foreign Skilled Worker program operated by the BC Construction Association. It uses a shared immigration resource person to support members with overseas recruitment, immigration application processing, talent matching to job vacancies, and settlement and integration services.

Irrespective of whichever immigration support program is implemented, the options would likely require some specific changes to immigration and labour policies at both the provincial and federal levels.

3.5 GROUP 4 – Improving Youth Engagement and Diversity

MANDATE

The mandate of the fourth working group was identifying ways to better brand the industry, engage youth at an earlier age to consider careers in the Apparel Industry and through both these efforts look at ways that might increase diversity. The overall goal of this group is educating the public, students and decision makers along with trying to capture a greater mindshare.

Obviously with major labour challenges the industry wants to build an attractive brand to entice workers to choose careers in apparel. One would think this would be easy given the amazing brand portfolio that exists within BC's Apparel Industry. The apparel brands also evoke an amazing lifestyle through their premium and performance products. However, when most youth look at apparel they only see the retail components, not the design, engineering, manufacturing, supply chain or e-commerce opportunities.

Unfortunately, focus groups demonstrated little to no knowledge of the industry and it was clear that career paths were not evident for job seekers. This was born out in a youth survey completed as part of Phase 2 of the Sector LMP when only 0.48% of almost 500 students identified wanting careers in the Apparel Industry.

Of interest was that of 31 values tested amongst youth the top 3 values aligned exactly with the jobs and work cultures found in the Apparel Industry. Youth also identified a number of cultural motivators referencing that pride of product, or brand were a much higher motivator than money. Both these facts demonstrated that youth would find very rewarding careers if they pursued occupations in apparel.

TOPICS FOR EXPLORATION

This group was posed with a number of questions:

- How does industry frame the image that youth, and the public, have of Apparel?
- How does career path information become more prominent?
- How linked are companies to high-schools?
- What do companies/colleges do now that works?
- What do competitors in other jurisdictions do well to attract youth?
- What are other industries doing well to attract workers?
- What types of awareness campaigns work with youth?
- What age brackets are best targeted?

COMPOSITION

Working Group 4 was comprised of a more than a dozen individuals representing a diverse group of employers, secondary and post-secondary institutions, along with others interested in growing the potential career opportunities for youth. It is the largest of the four working groups.

Name	Organization	Title	Category
Laura Appleton	Arc'teryx	Talent Acquisition & Development Manager	Big 4
Gaby Bayona	Truvelle	Owner	SME
Natasha Campbell	Visual College of Art & Design	Head, Community Engagement	Post-Secondary
Keith Doyle	Emily Carr University	Faculty	Post-Secondary
Andhra Goundrey	KPU	Coordination, Fashion Design	Post-Secondary
Justine Higgs	Lasalle College	Admissions Representative	Post-Secondary
Susan Jennings	Burnaby School District	Teacher	Secondary
Dawn Kelly	Vancouver School District	Teacher	Secondary
Corinne Kepper	Aritzia	Director, Corporate Communications	Big 4
Alex McAulay	Kosan	Founder	SME
Brad McCann	Platform Product Solutions	President	SME
Sarah Murray	VCC/Fashion Week	Program Coordinator	Post-Secondary
Michael Pope	KPU	Instructor	Post-Secondary
Katherine Soucie	Soucie Design	Owner	SME
Vivienne Taylor	Fashion High	Owner	SME

Invitees from the Ministry of Education and Industry Training Authority were invited as observers but were unable to participate. The SLMP Project Manager participated when possible.

This working group met on March 10, April 13 and June 16, 2017.

IDEATION

First raised was the fact that there are no current resources to promote the industry. People know nothing about the strength of the BC Apparel Industry because no common repository exists. It was noted by participants that Montréal has a website, "mmode" (mmode.ca), that has a profile of the industry cluster along with profiles of companies and some key individual stakeholders. It was thought that this would be an important awareness tool to create. It could include a profile of the industry, a profile of each company, profiles of the various occupations, profiles of key individuals and influencers along with maps of various career paths and other information. Inspiration and interlinkages can be found on sites like Mode Montreal (modemontreal.tv), Toronto Fashion Incubator (www.fashionincubator.com), Career Zone (www.gov.bc.ca), Career Cruising (www.careercruising.com), True Calling (truecallingcanada.com) and Heading for Success (headingforsuccess.com).

Also discussed was the idea to create video content that could not only populate the site but be part of a broader awareness and social media campaign. Ideas included engaging high-school students in a contest where they work for a day at an apparel company leading to the creation of a video profiling their work day and different tasks or projects they got involved in.

The THESA (Teachers of Home Economics Specialist Association) members, a provincial association of secondary school teachers, would welcome these types of tools to help engage their students. They also suggested creating an Apparel Day during the annual THESA conference to help educate the teacher through speakers, tours and events. Combined with the tools, this knowledge could better prepare teachers to influence students on potential career choices.

The group discussed the creation of a mentorship network that could bring apparel speakers into schools to talk about their careers and industry.

Another idea that emerged was regional design conferences to help bring apparel awareness initiatives out of the Lower Mainland. One concept was to blend these conferences with existing programs or events such Find Your Fit and the Skills Canada competition.

Group participants were very excited about investigating the possibility of creating an Apparel ACE-IT (Accelerated Credit Enrolment in Industry Training) type of program that exposes youth to training and work opportunities. The course component of the government-sponsored program is done as a partnership between school districts and post-secondary institutions for on-site training at either location. Students gain both high-school graduation credits and a head start towards completion of a post-secondary credential. This is followed up by practical hands-on experience and skills development with an employer sponsor through the Secondary School Apprentice program. These programs have recently been renamed to Youth Train in Trades and Youth Work in Trades.

Another item that was brought forward was the marketing prowess of the Fashion Institute of Design and Merchandising (FIDM California). They have set up a network of Fashion Clubs in local high-schools. Interested students get all the tools and support to establish a club in their school. This helps create interest and connection to the Apparel Industry and encourages increased participation in FIDM programs. FIDM also runs specialized programs to get people interested in the industry such as their one-day workshop for non-sewers – Learn How to Sew Like a Designer – as well as 3-to-5 day programs during the summer to take advantage of the potential education-tourism market.

In addition to recruiting more teachers to the working group, this group also recommended forming a sub-committee of students who could best validate how they want to be engaged. This did not occur as it fell during final exams for many students. However, as the strategic initiatives continue it was expected that this sub-group could still be formed.

3.6 BC APPAREL ASSOCIATION

During the phases of the BC Apparel Sector LMP, the formation of a BC Apparel Industry association was regularly raised by all the working groups. Group members all felt that the broader success of the SLMP, especially when Phase 4 begins, will depend on the industry having a strong association.

The association is assumed to be the natural home for industry coordination, project delivery and initiative continuity.

A group of interested parties has essentially formed a fifth working group that, even though it is operating independently and outside the scope of the SLMP, is providing an additional group of input and advice.

The interim board of the apparel association had representatives from five clusters of stakeholders. However, the representative from the larger firms stepped down in July 2017 due to competing time commitments.

Interim Board of BC Apparel Association		
Name	Organization	Constituency
Mark Anderson	Mustang Survival	Manufacturing/Technical
Vanessa Fors	Helly Hansen	Design/Technical
(Resigned)	Aritzia	Integrated/Premium
Paul King	Kendor Textiles	Materials/Supply Chain
Evelyn May	KPU	Post-Secondary

This group met on March 1, April 7, May 23, June 14, June 28, July 22 and August 10, 2017.

This group is exploring the value proposition and services of an association that is representative of the diversity of stakeholders and their needs in the cluster. Their goal is to expand the board of the organization by September 2017 and start building out the membership base.

3.7 OTHER SOURCES OF INDUSTRY INPUT

Stakeholders also engaged in the process through other existing groups and informal meetings which created additional opportunities for industry to provide input and feedback to this process.

First, post-secondary institutions made their Program Advisory Committees (PACs) available. Multiple meetings occurred where the Phase 2 findings and the Phase 3 ideas were presented. Individuals who were not already participating in the working groups were able to share their insights and perspectives.

Second, an on-going set of visits to factories and apparel company offices occurred where additional questions could be asked of employers and they could provide direct and private feedback.



RECURRING IDEAS

4 RECURRING IDEAS

During the working group discussions, many ideas were raised under each topic and debated. In fact, several of the conversations overlapped between the different groups and specific ideas were raised multiple times.

The groups appreciated that the proposed solutions have to be discrete projects that can be implemented and have a plan to resolve a specific labour challenge. This led to some groups having more ideas than others.

The following ideas indicated in the table below were mentioned most frequently. They are seen as keystone or foundation pieces needed in order to build a more comprehensive strategy.

	Working Group 1	Working Group 2	Working Group 3	Working Group 4
Recurring Idea	Post-Secondary Training and Industry Relationships	Resolving Industrial Sewing Capacity	Immigration for Specialized Skills	Improving Youth Engagement and Diversity
SUPER PAC SUMMIT	X			X
INDUSTRIAL SEWER CURRICULUM AND CERTIFICATION		X	X	X
IMMIGRATION FASTTRACK		X	X	
INDUSTRY PROFILE (Web and digital)	X	X		X
INDUSTRY ASSOCIATION	X	X	X	X

4.1 IDEA 1: SUPER PAC SUMMIT

The participants in Working Group 1 felt that the first step in improving the relationships between post-secondary institutions and industry is the need to build a stronger dialogue between the parties. It was felt that any changes to curricula or the development of new programs could occur at later stages after the communication and understanding is improved.

One suggestion to achieve this was to organize a regular summit. The format of this initiative could be a facilitated round-table and conference to explore skills and innovation challenges faced by industry over the next 5-10 years.

It could be hosted as a stand-alone event or hosted in conjunction with Apparel Camp or Fashion Week to tie it more broadly to the apparel cluster in BC. The concept would be to hold the summit annually with sub-groups meeting more frequently, if required. It was observed that this would potentially be similar to a scaled-up version of the Sector LMP committee and working groups.

The forum would allow industry to share with post-secondary institutions where they envision their growth plans taking the companies in a 5-to-10-year period and the industry's corresponding needs in terms of skills, research and innovation. Beyond the plenary session, specific breakout groups would delve into the various skills areas, research and development, and innovation themes.

As such the expectation is that, in addition to the fashion and design programs, the business, engineering, science and continuing education faculties would also participate in this conference.

The goal would be to build better partnerships with industry so post-secondary institutions are able to respond in a reasonable time frame with programs or initiatives that support the competitive needs of industry that may change as corporate direction changes. It is also important to build regular collaborative partnerships to encourage on-going communication.

The outcomes would be for the industry and post-secondary institutions to co-produce a rolling plan that could be updated annually as needs change. This would give post-secondary institutions medium-term vision as well as short-term tactical results to help improve planning and resource allocation.

4.2 IDEA 2: INDUSTRIAL SEWER CURRICULUM AND CERTIFICATION

Given the high vacancy rate for sewers the industry needs as many trained sewers as possible in the shortest period of time. It is in industry's best interest to have a robust sewer training program. This means there should be a standardized core curriculum to be used by all instructors irrespective of where training occurs - Canada or Internationally. In addition, in order to verify candidate sewers have all obtained the same level of skill, an industry certification process should be put in place. This will ease the burden on employers by validating the competencies of sewers graduating from parallel run training programs and reducing hiring risk and potential turnover.

Even though employers want to fill vacancies with trained individuals they also felt that training should not last for an inordinately long period. Employers would accept individuals with "Level A" skills into their workforces and continue the specialized training directly for their own machinery and processes.

As a result, the group is proposing the development of an initial training program that reflects the following structure.

Industrial Sewer - Foundation	
8 Weeks	Exposure to: <ul style="list-style-type: none"> ▪ English ▪ Safety ▪ Single needle operation ▪ Overlock operation and threading ▪ Basic garment components ▪ Basic stitches - top/edge ▪ Pockets and zippers
Grade of 80% required to pass and advance	

Industrial Sewer - Level A	
12 weeks	Focus on improving skills, quality and speed Exposure to: <ul style="list-style-type: none"> ▪ Woven (denim, cotton) ▪ Knits (Spandex and stretch fabrics) ▪ Accessories and Upholstery (nylon, webbing, leather)
Grade of 80% required to pass and gain certification	
Workforce entry	

This would be refined in Phase 4 and training and testing materials would be developed. The group would use this as a pilot and then pursue industry certifications for other roles such as Pattern Maker, Textile Sourcers and Quality Professionals.

4.3 IDEA 3: IMMIGRATION FAST-TRACK

The Phase 2 findings identified a significant shortage of skills in 9 types of positions industry names as critical to their success:

- Apparel Quality Professionals
- E-commerce Professionals
- Fit Specialist Engineers
- Merchandisers
- Pattern Makers
- Product Designers
- Sewers
- Supply Chain and Logistics
- Textile Sourcers

The demand for these types of positions over the next 10 years remains extremely high and it will be exceedingly challenging to hire or train locally in order to satisfy the needs of industry. In addition, immigration remains the most likely pathway to fill critical vacancies at all levels – executive, mid-level professional and semi-skilled. Participants felt that an immigration component will be required to help alleviate the challenges employers are currently facing.

Industry is proposing to conduct an immigration pilot in the hopes of developing a steady pipeline of skilled workers. It was proposed this be attempted with sewers first as many of the other functions depend on local sewing capacity.

One concept would be to conduct the pilot through an employer consortia which would provide governance and could potentially expedite hiring. The consortia would be able to work through two paths both of which would leverage the industrial sewer curriculum and certification developed above.

[Path A: Foreign Skilled Worker](#)

This path would be used to assess and validate the skills of industrial sewers who self-identify overseas. Qualified sewers would be offered employment under an existing work-permitting process. They would then be brought into the country under an LMIA for foreign skilled workers. This would be very similar to the Foreign Skilled Worker program run by the BC Construction Association.

[Path B: Pre-Arrival Training and Peer Selection](#)

This path would be used to train semi-qualified individuals overseas to help bolster the number of qualified skilled people to fill the large number of vacancies in BC. The concept would be to Train for Industry and to take advantage of the processing times to ensure candidates gained sufficient English language, safety and productivity training. Candidates would also have their sewing skills validated and upgraded. Path B would potentially offer faster settlement and integration as new-arrivals could begin

work immediately. They also would have been exposed to the employer's culture, jargon and standards before arrival so would have a better sense of performance expectations. Lastly, training as a peer group would have some additional benefits. From previous hiring in the industry we see better attachment if groups of new hires are placed together in a single employer. This provides an internal social support network. This "Bring Your Neighbourhood" has worked well in the placement of mechanics from Europe as they continue to work with their friends and social contacts in Canada.

The consortia would also lend support to smaller employers who may not have the human resources to fully participate as larger employers. This would include having immigration consultants as part of the project team to manage the administrative process of the applications. The balance of the project team would be responsible for skills assessment, training and job placement.

Even though Phase 2 sought to focus on 9 most -critical positions, the apparel cluster within BC depends on the talents of many more types of positions (see Appendix C). Many of the firms are still adapting to changes various federal and provincial immigration programs. As stated previously, the larger firms depend on these programs to source executives and mid-tier professionals with global apparel experience. Immigration solutions need to address all skill levels.

For immigration to be a true solution, the federal and provincial governments also need to allow a fast-track process for people industry deem as qualified or have a job offer. It was noted throughout the discussions that companies regularly lose candidates to other employers because of delays in immigration process.

4.4 IDEA 4: BC APPAREL INDUSTRY PROFILE AND IMAGE

Participants across all working groups felt that the biggest issue impacting labour attraction and attachment is the limited awareness of the industry and the careers, experiences and opportunities that exist within it.

Companies have generally been focused on their own growth and needs, and in the absence of an industry body, no coordinated promotion has occurred.


The industry would like to collaborate to build an interactive multi-media website and mobile web application that seeks to educate youth, parents, teachers and other influencers on the BC Apparel Industry and the association careers.

The website would include a profile of the industry along with profiles of the businesses and the creative culture that constitute the cluster. There would also be profiles on the types of products manufactured in BC to appeal to pride and passion motivators evidenced in the Phase 2 Youth Survey.

In addition, profiles would be built on the types of roles or occupations that exist and the career paths that lead to higher level roles. Profiles of training programs offered by the local post-secondary institutions would also be included.

The site would include a large amount of multi-media content.

This provides a required set of tools to launch an awareness campaign marketing the industry to target audiences identified above.



It was also suggested that industry explore pathways to have apparel identified within the definition of cultural industries. This would allow more sources of funding for promotion through the fashion lens and leveraging other cultural events that occur.

4.5 IDEA 5: BC APPAREL INDUSTRY ASSOCIATION

The BC Apparel Industry has been without an industry association of its own since 2001. In relation to project sustainability, many of the working group discussions raised the topic of needing to ensure the strength and viability of an industry association.

This was raised primarily because group participants felt that much of the current situation is the result of not having had a group to coordinate the industry or act as a common voice and glue for the various stakeholders in the sector over the years. This has reinforced stove-piped approaches.

Furthermore, it was felt that the lack of a strong association would undermine solution implementation as there would be no coordinating body to bring cohesion to the proposed strategic initiatives and ensure they continue beyond the lifespan of the five phases of the BC Apparel Sector LMP.

Participants felt that an apparel association might require some start-up funds to accelerate the development of the association and to ensure the association is able to play an effective leadership role in Phase 4. Though not commonplace, there may be some precedent for government providing direct funding to an association for a limited period of time if the industry was deemed a strategic priority. This would however fall outside the scope of the SLMP.



LEARNING FROM PEER JURISDICTIONS

5 LEARNINGS FROM PEER JURISDICTIONS

Prism Economics and Analysis was contracted to identify how other jurisdictions are addressing similar challenges in their own apparel clusters so that British Columbia could learn and adopt best practices.

The supplementary report, **BC Apparel: Scan of Peer Jurisdictions and Identification of Best Practices**, looked at how seven cities – three within Canada: Montréal, Toronto and Winnipeg; and four internationally: Los Angeles, New York, Milan and Berlin - are addressing the same four workforce challenges identified as part of this project - industrial capacity, the role of immigration, youth engagement and diversity, and the impact of post-secondary institutions. It also looked at a fifth theme of what structures exist to support their apparel industry.

These locations were selected for a number of reasons. After a historic decline in western apparel industries, companies and clusters are recovering through business models which focus on close ties between designers and manufacturers as well as fast turnaround times and production runs calibrated to minimize inventory. These business models are supported by technological innovations in terms of on-line retailing, software design, automation and digital printing. The major Apparel Manufacturing cities are also creative cities with a defined global brand, abundant supplies of talented designers, sophisticated marketing and media industries, and developed technology industries. They also face challenges not only from low-cost imported products but from a shrinking availability of factory space and difficulty attracting and retaining skilled workers.

The report included a profile of each jurisdiction along with findings for each of the themes. In addition, highlighted best practices such as incubators and industrial sewer training are identified and presented in a deeper level of detail.

5.1 OBSERVATIONS

A number of observations emerged. The first is that building a global apparel cluster takes time and requires a multi-faceted, coordinated strategy. This strategy needs to create a multi-pronged approach to address challenges in parallel. Significant investments were made by stakeholders. Lastly, it was very clear that the success depended on strong collaboration between industry, post-secondary institutions and government.

INCREASING INDUSTRIAL CAPACITY

In all jurisdictions, large production orders for apparel are likely to be produced overseas simply because of cost. Higher value product was generally produced locally. All cities studied made some use of contracting out manufacturing, but to different degrees. In Los Angeles, almost all manufacturing is contracted out to a group of highly-competitive and weakly-regulated small local producers. In Milan, contractors tend to be drawn from larger firms based in suburbs, each with its own expertise cluster co-existing with low-cost small firms. Many firms are foreign owned. In Berlin, it is not unusual for small designers to manage production in-house. The small scale of apparel producers creates financing challenges and in many cities, there are either programs to provide subsidized loans or grants for equipment modernization, or institutions allowing small firms access to high-cost equipment. Berlin and Toronto are noteworthy for civic support of business incubators or social enterprises designed to develop entrepreneurial skills in young designers.

ROLE OF IMMIGRATION IN SPECIALIZED SKILLS

In Canada, possessing technical skills related to apparel production can be recognized as criteria for immigration. However, as the size of the Apparel Industry has declined the overall priority given to attracting these skills has also declined. In Los Angeles, the immigrant community make up most of the workers in apparel production but immigration is not managed or targeted to the same degree given the large existing immigrant workforce. This seems to be the case also in New York, Toronto and Milan. Many manufacturers base their business model on the use of lower-skilled technical workers. In Berlin immigrant labour provides critical skills. However, the small scale of enterprises has produced more integration along the value chain of the industry, including entrepreneurs and designers.

ROLE OF POST-SECONDARY INSTITUTIONS

In design, all jurisdictions have integrated training with a cluster of schools providing practical instruction combined with internship/mentorship programs. Post-secondary institutions have tended to focus more on design, engineering and business management. Several prominent post-secondary institutions contribute to innovation and research.

In production, this approach is also applied in Milan, but in other jurisdictions, manufacturing techniques tend to be a junior part of an overall design curriculum. Skills development in production is instead part of workforce training (often to meet broader welfare objectives) in New York, Berlin, Toronto and Montréal. In Winnipeg, funding of workforce training is much more firm-specific because of the relatively small size of the sector.

IMPROVING YOUTH ENGAGEMENT

In all cities, young people are drawn to apparel design as an exciting, creative industry which is pursued even at the expense of higher incomes found elsewhere. Young people go through what are effectively apprenticeship roles as assistants or interns in any city with large established fashion houses (particularly Los Angeles, New York and Milan). In New York, Berlin and Toronto there are established institutions to support small designers working on their own by placing them in a larger fashion community and facilitating mentorships with more established designers. The biggest challenge for youth engagement relates to drawing young people into production, which is seen as a dying part of the industry. Milan's approach is through specialized college programs which are tightly coordinated with industry, improving employment prospects. For small-scale vertically integrated firms, production is part of the work of design and so young people develop production experience out of necessity. Montréal's colleges and industry initiatives have shown a way forward by focusing on training in emergent technologies that still build production skillsets, but also allow for challenging, creative work which is framed as ascendant rather than in decline.

5.2 SUGGESTED RECOMMENDATIONS

Based on findings and analysis, what has made several apparel clusters successful is that they have created local ecosystems that blend education, innovation and manufacturing in the right proportions. This has resulted from coordinated policies and cooperation between industry, post-secondary institutions and government.

British Columbia's apparel cluster, primarily concentrated in Greater Vancouver, could seek to replicate some of the best practices identified in the peer jurisdictions. The report made seven recommendations for the working groups and Steering Committee to consider integrating into the Strategic Initiatives.

5.2.1 Financing Capital Investment

Apparel manufacturers are typically small and often operate as independent suppliers to larger firms. These manufacturers have cash and capital shortages, so they are limited in their capital investment in machinery and equipment. Targeted grants and loans are seen as more effective than tax credits.

- In New York, this is being dealt with through small capital grants to support investments in new technologies.
- In Berlin, the approach is to partner with public investment banks to micro finance loans.
- In Winnipeg, firms are able to take advantage of a provincial manufacturing tax credit if they have the capital available for the initial outlay.

Recommendation:

British Columbia should establish a financing mechanism to support capital equipment investment by small and medium apparel manufacturers to implement new production technologies. A grant program is preferable, however, a loan program targeted to the sector would also be useful.

5.2.2 Geographic Clustering

New York, Toronto and many other highly developed cities have lost manufacturing space as a result of residential and commercial property development. Higher priced rents have forced manufacturers out of their natural clusters. The approach to deal with this has been to designate areas within the cities to concentrate Apparel Manufacturing; typically, these are older industrial areas or repurposed zones dedicated for Apparel Manufacturing. The heart of the cluster should include a hub where education, training, incubator and manufacturing activities can concentrate and provide mutual support.

- In New York, governments worked with property developers to establish Sunset Park and hubs like Manufacture New York.
- In Los Angeles, the Market buildings create a natural cluster and hub.
- In Berlin, the *Zwischennutzung*, a program of subsidized facilities, has helped support some apparel industry clustering.

Recommendation:

The municipalities in Metro Vancouver should identify and designate a zone for Apparel Manufacturing to be a focus for a cluster of production, education, training and innovation facilities for the BC Apparel Industry. This designated zone must be supported through public and private investments in the Apparel Manufacturing infrastructure. Small and medium sized enterprises could be offered space in the district at less-than market rents for a period of business growth. Potential locations could be in False Creek Flats or East Vancouver.

5.2.3 Business Incubators

Supporting the growth of small and medium sized businesses can help them grow quickly and increase the chances of success. A key component of the manufacturing infrastructure is the establishment of a

dedicated apparel business incubator. The business incubator has access to technology and equipment (fashion forecasting software, 3-d printers, intelligent manufacturing equipment, etc.), subsidized workspaces, designer-supplier-production databases for local sourcing, training spaces for technology transfer and vocational training, networking and cross-pollination opportunities. The business incubator should be integrated with post-secondary educational programs to enable transitions from education to creative work through internships, mentoring and entrepreneurship in the Apparel Industry. The incubator should have a time limit on residency to encourage businesses to graduate and move into the apparel hub within the broader cluster. Incubators can also help resident businesses gain the skills to properly manage a project or run a business under the guidance of mentors and peers.

- In New York, incubators exist and are supported by the Council of Fashion Designers of America and complementary fellowship and mentoring programs.
- In Toronto, one of the more successful incubators provides a wide array of supporting services for entrepreneurs.
- In Berlin, a unique incubator exists focused on fashion technology.

Recommendation:

The Vancouver region should establish an apparel business incubator within the Apparel Manufacturing cluster to be a focal point for kick-starting new businesses and innovation in the industry. This could help teach essential business skills and contribute to the development of the next generation of leaders.

5.2.4 Income Supports for Training

Wages and salaries at early stages of working in the Apparel Industry are often low. This is not sufficient enough incentive to attract workers into the industry or to retain them through the learning periods when productivity is low. Many candidates would rather work in another job for short-term gain instead of participating in training that leads to higher reward in the longer-term. Manitoba and Berlin have developed mechanisms to provide income support during these stages.

- In Winnipeg, Manitoba's program supports sewers with an honorarium while in training to reduce the pressure of having employment while learning.
- In Berlin, a wage subsidy program supports sewers as well as designers and retailers. In fact, the entire supply chain through the start-up phase is supported.
- In Montreal, employers can benefit from a \$16,000 wage subsidy to encourage the recruitment and skills development of youth.

The income support program needs to be paired with community targeted training for immigrant communities to integrate immigrants into the Apparel Industry. Skilled worker immigration programs have not been directed towards attracting immigrant sewers. Nonetheless, there are untapped immigrant communities who are regionally located and have entered Canada through alternative immigration programs such as family reunification. Income support paired with vocational training can be instrumental in bringing these persons into the Apparel Industry. The same concept could be applied to other under-represented groups to help attract them to the industry and retain them during the training and certification process.

Recommendation:

Provide income support for people during the early stages of training and working in Apparel Manufacturing.

5.2.5 Innovation

The success of several apparel clusters also links post-secondary institutions playing a role in training as well as innovation. The development of new technologies, materials and production methodologies is what has helped many clusters remain competitive. The strong ties with industry also help to take theoretical initiatives and rapidly turn them into commercial products.

- In Berlin, Germany's significant investment in research and development, as well as having dedicated institutes for apparel innovation, provides a serious competitive advantage.
- In Milan, Italy's approach to innovation links post-secondary institutions to industry associations and companies to work on collaborative priorities.
- In New York, the post-secondary institutes are heavily linked to, and approved by, the Council of Fashion Designers of America who encourages and drives innovation in the industry.

As part of strengthening relationships between post-secondary institutions and industry there should be a focus on innovation. This could include better linking existing science and engineering programs with the Apparel Industry or creating a new program for textile science.

Recommendation:

British Columbia should establish an apparel innovation network across one or more campuses to emphasize the science, engineering skills and innovation required by the province's Apparel Industry. The province should also launch a new Textile Science program.

5.2.6 Global Brand

One of the unique advantages of many of the apparel clusters reviewed is their link to a strong civic brand. Many of the cities are seen as destinations for creative industries, science, education or tourism. In addition, many of the cities are top global tourism destinations which helps draw visitors who are prospective students or customers. This has helped allow conferences, seminars and exhibitions to flourish and be well attended. Most of the cities have strong post-secondary institutions. Several of the cities are also fortunate to have strong technology clusters for software development. A further advantage that several of the cities have are that they are home to their country's media industry, which helps with marketing.

Vancouver is a destination of choice for tourists because of its multicultural and safe society along with its natural beauty. Vancouver could seize on these attributes to do more to market its Apparel Industry and post-secondary programs to the world.

Several tourism, student, and investor recruitment campaigns already exist. Industry should work with government to explore how existing global marketing campaigns could be adjusted to include apparel. This could include reviewing how locally hosted successful events and exhibitions could be replicated or expanded to support apparel. This might include scaling-up an existing event.

Recommendation:

A working group be established amongst government and industry to explore marketing and event potential to reflect apparel.

5.2.7 Champion

The success of each apparel cluster has resulted from the desire of disparate parties to work together. In each instance, this has required the work and leadership of a champion. These initiatives have emerged from industry, found support in government, and subsequently established supporting infrastructure.

- In Milan, the Piattaforma Sistema Formativo Moda, an industry association, was initiated by post-secondary institutions and industry to coordinate and play a leadership role.
- In Montréal, mmode emerged as an industry driven cluster supported by the municipal government as part of its economic growth strategy with provincial and federal support.
- In Toronto, the Toronto Fashion Incubator, which plays a role larger than an incubator, was funded by both the city and province
- In New York, the city's economic development agency, the Council of Fashion Designers of America and many private partners funded a collective effort to reinforce the industry.

As part of any strategy, the three levels of governments in Vancouver should publicly declare apparel as a priority industry emphasizing not only the manufacturing components, but the linkages to design, science, engineering, technology, e-commerce and culture.

A sustainable initiative needs not only engagement from industry but sufficient infrastructure to advance the collective cause. Government and private industry should be prepared to fund an industry body to champion and deliver projects to strengthen the province's Apparel Industry.

Recommendation:

Metro Vancouver, the Government of British Columbia and the Government of Canada should jointly declare apparel as a priority industry. This should be followed by an annual \$1 million grant for 5 years to be matched by industry to provide start-up capital for an industry association.



6

STRATEGIC INITIATIVES

6 STRATEGIC INITIATIVES

The ideas from the working groups were formalized into draft strategic initiatives and circulated to working group members in early May. Revised strategies and a draft of the BC Apparel: Scan of Peer Jurisdictions and Identification of Best Practices Report was circulated to all working group members on June 1, 2017. The working groups met the week of June 13th to finalize the strategic initiatives so that they could include the recommendations from the peer jurisdiction report, which resonated with the groups.

Overall, the main objective is to improve local workforce availability plus the skills needed by the industry to remain competitive and grow. As a result, there should be a significant increase in apparel exports; some reduction in the amount of production shifted off-shore, and increased opportunities for BC-based firms to maintain jobs in the province. Ultimately, this will contribute to positioning Vancouver as a global apparel centre of excellence. A comprehensive long-term strategy is required to strengthen the local workforce, as well as improving innovation and branding, over the coming decade.

Presented below are the finalized strategic initiatives (SI). These five strategic initiatives (5 SI) are proposed to help address the skills and workforce challenges impacting BC's apparel companies identified in Phase 2 of the SLMP. Furthermore, the SI include some of the suggested actions recommended in the BC Apparel: Scan of Peer Jurisdictions and Identification of Best Practices Report.


The 5 SI are presented in order of priority according to the needs and input of the industry. The priorities are set based on two metrics – 1) urgency and 2) scale of impact.

Strategic Initiatives	
1	ENSURING SUCCESS THROUGH SKILLS DEPLOYMENT AND CONNECTIONS
2	INCREASING SKILLED LABOUR CAPACITY
3	EXPANDING AWARENESS OF APPAREL OPPORTUNITIES
4	STRENGTHENING POST-SECONDARY INSTITUTIONS' ALIGNMENT WITH INDUSTRY
5	ACCELERATING GROWTH OF APPAREL LEADERSHIP TALENT

The first strategic initiative (SI 1) is about creating a support structure for the industry so the various strategic initiatives are performed under an identifiable brand that resonates with stakeholders. This includes the establishment of a sustainable organization that is in place to advance the interests of BC's Apparel Industry, as well as to implement and manage the projects identified within the strategic initiatives. The peer jurisdictions all had strong support infrastructure in place.

The second strategic initiative (SI 2) relates to increasing the skilled labour pool in the province that many firms depend on for their design and production. In the short-term, while engagement initiatives and training programs are established, there will be a heavy reliance on immigration programs to meet the current labour needs of industry. Furthermore, firms need to look at increasing productivity where skilled labour challenges remain.

The third strategic initiative (SI 3) seeks to strengthen the engagement of youth and other groups not currently participating in the Apparel Industry workforce. BC's Apparel Industry brand needs to be championed amongst the next generation of potential workers. This will involve industry working very closely with secondary and post-secondary partners.



The fourth strategic initiative (SI 4) responds to the opportunity to better align post-secondary programs with the demands of the industry related to skills development and innovation, thereby resulting in stronger collaborative partnerships.

Last but not least, the fifth strategic initiative (SI 5) embraces the concept of developing leadership talent for the sector through an apparel centre of excellence or hub that also encourages entrepreneurship, builds leadership skills, and expands partnerships between industry and post-secondary institutions.

Additional detail on the initiatives and their subcomponents are presented in the following section.

6.1 STRATEGIC INITIATIVE #1 – ENSURING SUCCESS THROUGH SKILLS DEPLOYMENT AND CONNECTIONS

HIGH			
IMPACT	High	IMMEDIACY	Short-term
GOAL			
To continue industry engagement, manage complementary labour programs, and build connections with reinforcing initiatives.			
OUTCOME			
BC Apparel Industry workforce strategic initiatives are coordinated and continue to deliver value to industry beyond 2021.			
TARGET			
A self-funding industry body, with sustainable revenue streams derived from in-demand workforce solutions, is in place by December 2020.			
LEAD & SUPPORT		<ul style="list-style-type: none"> ▪ BC Apparel Association ▪ Supported by BC Alliance for Manufacturing and volunteers 	
	OUTPUTS	TACTICS	TIMEFRAME
1.1	Established an association to, in the first instance, address the BC Apparel Industry's workforce needs.	<ul style="list-style-type: none"> ▪ Industry, government and other stakeholders provide seed capital to cover association's start-up costs and operating costs for first 24 months. ▪ Association becomes owner of the strategies identified in this document and is responsible for project management and delivery. ▪ Association develops a business plan that shows it can deliver on industry priorities and will have sufficient resources available to meet these objectives. ▪ Association develops a financial plan that shows it can generate sufficient revenue to become self-sustaining before December 2020 and is able to establish a strategic reserve. 	January 2018 to December 2020
1.2	Implemented additional programs to address workforce needs.	<ul style="list-style-type: none"> ▪ In partnership with industry and post-secondary institutions manage a common job bank to help place interns, co-ops and graduates. ▪ Work with the provincial and federal governments on ensuring fast-track immigration pathways include access for the critical occupations identified by BC's Apparel Industry at all NOC skill levels A/O, B and C. 	July 2018 to December 2020
1.3	Identified other complementary resources and initiatives to support apparel workforce needs and job growth.	<ul style="list-style-type: none"> ▪ Have fashion and apparel included in the definition of cultural industries and identified as an important component of BC's value added exports. Also seek to integrate apparel with tourism and education marketing efforts to support building of Vancouver's global brand. ▪ Leverage cultural, trade, education and tourism events to promote the Apparel Industry and its career potential to international audiences. 	January 2019 to December 2020

6.2 STRATEGIC INITIATIVE #2 – Increasing Skilled Labour Capacity

HIGH			
IMPACT	High	IMMEDIACY	Short-term
GOAL To increase domestic industrial capacity by engaging more design, product development and manufacturing talent.			
OUTCOME BC Apparel Industry's short-term and medium-term vacancies of critical occupations are filled with skilled workers and productivity increases are realized.			
TARGETS Between 2018 and 2025, annually introduce to BC's labour force: 1) 125 new apparel professionals and technical roles (1,000 workers over 8 years). 2) 250 new industrial sewers (2,000 sewers over 8 years).			
LEAD & SUPPORT		<ul style="list-style-type: none"> ▪ BC Alliance for Manufacturing 	
	OUTPUTS	TACTICS	TIMEFRAME
2.1	Created resource to support immigration needs of SMEs.	<ul style="list-style-type: none"> ▪ Industry body hires dedicated immigration consultants to develop expertise in the BC Apparel Industry so they can act as a shared resource for SME's who do not have their own internal capacity or Human Resources department. ▪ Establish a program with elements similar to the BC Construction Association's industry-funded Foreign Skilled Worker program. ▪ BC Apparel Association to be an approved referral partner for the Global Skills Strategy talent streams. 	September 2017 to December 2020
2.2	Implemented a provincial immigration Fast-Track pilot program to fill critical vacancies.	<ul style="list-style-type: none"> ▪ Define a list of key occupations (see Appendix C) that could be included in a Fast-Track immigration stream for apparel and identify which current immigration programs already can be used, then where gaps exist. ▪ Establish a Provincial Nominee Program category for Apparel under the Entry Level and Semi-Skilled pathway for Permanent Residency. ▪ Seek LMIA exemptions for Entry-Level and Semi-Skilled, and Highly-Skilled pathways for select group of critical occupations that require Temporary Foreign Workers. ▪ Utilizing the competency standard from 2.3, evaluate foreign trained Industrial Sewers for Permanent Residency issuing bonus points if they can demonstrate requisite skill level. 	July 2018 to December 2020
2.3	Defined competency framework and industry managed certification for Industrial Sewers and other technical positions.	<ul style="list-style-type: none"> ▪ Establish an industry governing body to act as the advisory board for the definition of a standard and the referees in awarding of certifications. ▪ As a pilot, develop a common core Industrial Sewing Curriculum with two initial levels - Foundation and Level A Sewer. 	September 2017 to December 2017 and February 2018

		<ul style="list-style-type: none"> ▪ Define and publish the process for certification, including development of written and practical exams and standards for third-party examiners. ▪ Expand to other occupational roles such as Pattern Maker. 	to May 2018
2.4	Increased number of seats for training of sewers and other technical positions.	<ul style="list-style-type: none"> ▪ Establish in the Lower Mainland a cooperative industry run Industrial Sewing Training Centre, potentially leveraging excess factory capacity. ▪ Share/License curriculum from 2.3 with suitable training institutions in Pacific Northwest so they can create sewing centres in other regions. 	January 2018 to December 2020
2.5	Implemented an immigration pre-arrival pilot program to help industry collectively fill critical vacancies.	<ul style="list-style-type: none"> ▪ Work with federal and provincial governments to define a suitable framework for (permanent residency pre-qualification) pre-arrival training in source countries to increase size of candidate labour pool and provide short-term solution to large number of vacancies. ▪ Share/License BC curriculum from 2.3 with suitable foreign training institutions so they can train sewers in-country leveraging the Dogwood (BC high-school) Diploma model of a BC certification being taught overseas. ▪ Establish an employer consortia to perform functions similar to Health Match BC for the technical and trades positions needed by the BC Apparel Industry. 	July 2019 to December 2020
2.6	Increased industrial productivity of BC apparel manufacturers.	<ul style="list-style-type: none"> ▪ Leverage Canada BC Jobs Grants to train technical and trades workers critical to the Apparel Industry through a fixed funding envelope dedicated to provincial priority manufacturing industries. ▪ Design and introduce a jointly funded (matched funding) business advisory program to help apparel enterprises work with technical consultants to improve manufacturing productivity. ▪ In cooperation with various government and financial agencies, design and introduce a grant and loan program to encourage investments in innovation - capital equipment and new technologies. 	July 2018 to December 2020

6.3 STRATEGIC INITIATIVE #3 – Expanding Awareness Of Apparel Opportunities

MEDIUM-HIGH			
IMPACT	Medium	IMMEDIACY	Medium-term
GOAL To increase the awareness of the BC Apparel Industry and the diverse and dynamic career opportunities within.			
OUTCOME A greater number of youth and under-represented groups choose to enter BC's apparel workforce.			
TARGETS By December 2019, via youth surveys, show a 200% increase in "Favourable Consideration of Careers in the Apparel Industry" over those identified in the Sector LMP Phase 2 report. By December 2020, via post-secondary institutions data and job vacancy rates, show a 20% increase in new student registrations and a job vacancy rate decline of 10% over those figures identified in the Sector LMP Phase 2 report.			
LEAD & SUPPORT		<ul style="list-style-type: none"> ▪ BC Apparel Association ▪ Supported by post-secondary institutions and industry working group 	
	OUTPUTS	TACTICS	TIMEFRAME
3.1	Built a collective brand and public information source for BC's Apparel Industry.	<ul style="list-style-type: none"> ▪ Work with Apparel Industry corporate marketing departments to establish a collective industry story that provides a framework around vision, purpose and key messages. ▪ Build website that not only evokes shared values but profiles the industry and its strengths; showcases the constituent companies; highlights the career diversity; and introduces the stories of key influencers. In addition, the site will illustrate career maps and skills profiles for key positions. It will profile the different education programs available to gain those skills and provide a job-bank and wage data. ▪ Create an electronic library of dynamic and exciting multi-media content that can be used to engage youth, parents, educators and employment agencies. ▪ Launch a targeted social media/broader marketing campaign to promote the industry and career potential to job-seekers. 	January 2018 to December 2020
3.2	Created a toolkit to support educators at BC schools.	<ul style="list-style-type: none"> ▪ Work with THESA to define a list of needed tools to enhance understanding and encourage students to pursue apparel related careers. This could include: <ul style="list-style-type: none"> ○ Apparel industry presentations; ○ Speakers/Mentors; ○ Industry sponsored projects; and ○ Industry tours. ▪ Work with government, industry, post-secondary institutions and THESA to implement a program which raises funds to rebuild and refit home economic classes in BC schools with Apparel Industry related equipment and materials (like the BC Construction Foundation's Project Shop Class). 	July 2018 to December 2020

		<ul style="list-style-type: none"> ▪ Work with industry, Skills Canada and other apparel associations to implement a more inclusive and exciting skills competition. 	
3.3	Implemented an apparel specific career fair.	<ul style="list-style-type: none"> ▪ Work with post-secondary institutions, secondary/THESA and industry to launch a career fair showcasing the diverse careers and work cultures found within BC's Apparel Industry. ▪ Showcase the educational pathways to these careers, identifying appropriate post-secondary programs and work experiences. 	January 2019 to December 2020
3.4	Implemented an industry supported education and employment program at BC schools.	<ul style="list-style-type: none"> ▪ Work with Ministry of Education, post-secondary institutions and industry to identify suitable framework to establish a Youth Training/Working in Apparel pilot at a secondary school in the Lower Mainland; replicating the successful ACE-IT model. 	July 2020 to December 2021

6.4 STRATEGIC INITIATIVE #4 – Strengthening Post-Secondary Institutions’ Alignment With Industry

MEDIUM			
IMPACT	Medium	IMMEDIACY	Medium-term
GOAL To increase dialogue and strengthen relationships between post-secondary institutions and industry.			
OUTCOME The province’s post-secondary programs are well-aligned with BC Apparel Industry’s skills (training) and innovation (research) needs.			
TARGET By June 2019, via industry survey, to show a 50% improvement in CEO satisfaction scores over those identified in the Sector LMP Phase 2 report.			
LEAD & SUPPORT		<ul style="list-style-type: none"> Post-secondary institutions working group Supported by BC Apparel Association and BC Alliance for Manufacturing 	
	OUTPUTS	TACTICS	TIMEFRAME
4.1	Improved post-secondary institutions’ understanding of BC apparel skills and innovation needs.	<ul style="list-style-type: none"> Establish roundtable with post-secondary institutions’ Deans and industry CEOs to identify and discuss the CEOs visions for growth. Host a Summit where industry leaders can discuss with post-secondary practitioners more specific skills and innovation needs. Prepare an Apparel Industry Skills and Innovation Roadmap (2018) to guide institutional programs. Update annually. 	January 2018 to June 2018 AND September 2020 to December 2020
4.2	Better aligned post-secondary educational programs (design, engineering and science) with industry needs.	<ul style="list-style-type: none"> Establish anew the program advisory committees at each post-secondary institution and seek CEO signoff on their corporate representatives’ participation. Review existing programs in greater detail against the 2018 Apparel Skills and Innovation Roadmap. Identify and further explore strengths of the international post-secondary programs preferred by CEOs. Produce a report to identify specific education initiatives to be replicated in BC. Reinforce post-secondary specializations, as appropriate. 	January 2019 to December 2020
4.3	Better aligned post-secondary institutions’ research and development with industry challenges.	<ul style="list-style-type: none"> Establish top 10 priorities for research and development (design, engineering, materials, production and software/digital). Establish collaborative post-secondary institutions and industry Innovation Circle for each priority. 	July 2019 to December 2019

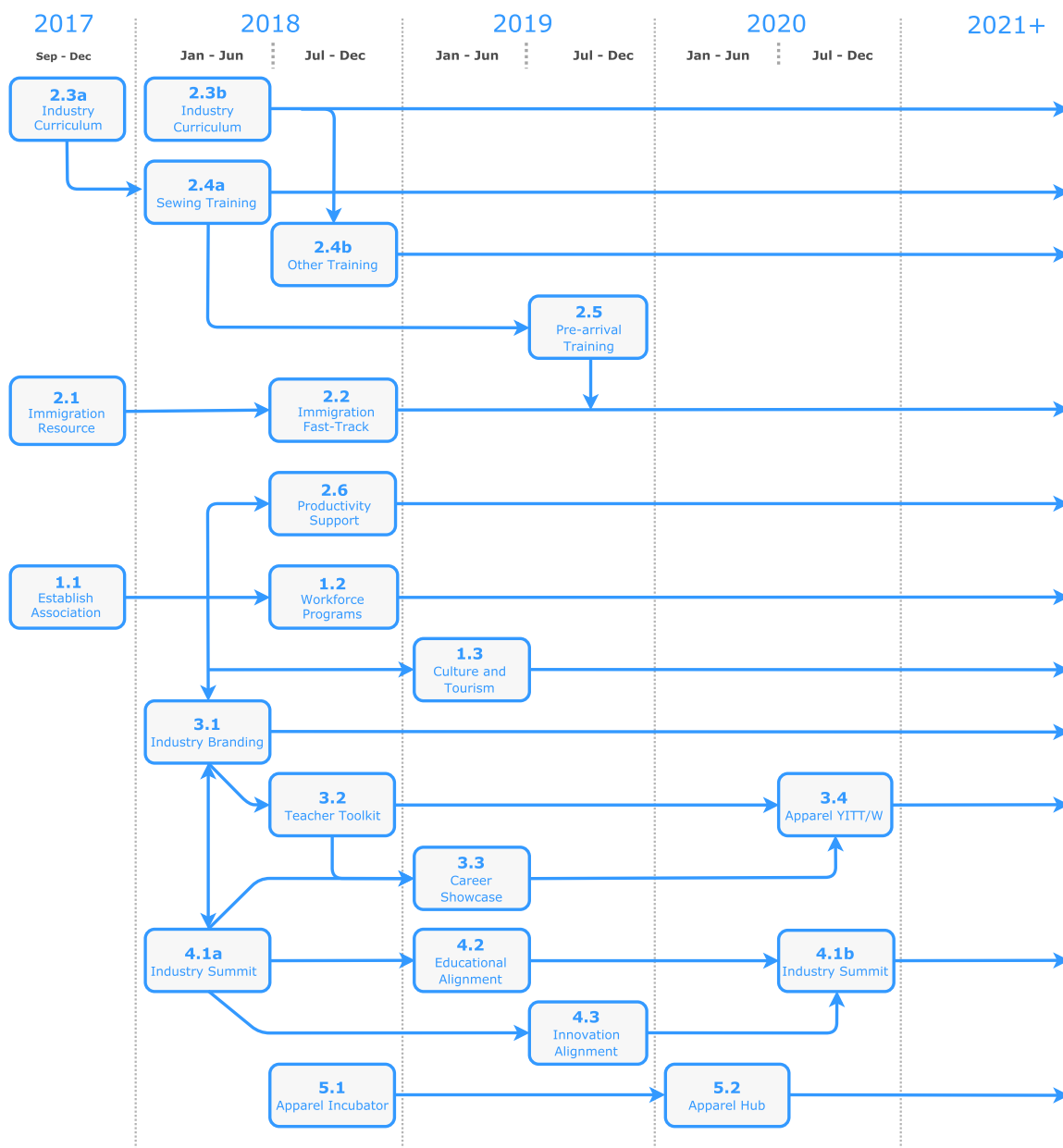
6.5 STRATEGIC INITIATIVE #5 – Accelerating Growth Of Apparel Leadership Talent

MEDIUM-LOW			
IMPACT	Medium	IMMEDIACY	Long-term
GOAL To develop and strengthen the next generation of apparel leadership in British Columbia and support growth of apparel companies.			
OUTCOME BC Apparel Industry gains increased number of business-savvy leaders contributing to the growth of the sector.			
TARGET By September 2020, establish a centre of excellence that provides tools and programs to grow apparel leadership and innovation.			
LEAD & SUPPORT		<ul style="list-style-type: none"> ▪ BC Apparel Association ▪ Supported by BC Alliance for Manufacturing 	
	OUTPUTS	TACTICS	TIMEFRAME
5.1	Increased number of top apparel design and manufacturing leaders in BC.	<ul style="list-style-type: none"> ▪ Establish an incubator to encourage entrepreneurial and management skills. ▪ Enact an Apparel Fellowship program in partnership with industry and post-secondary institutions to help leaders develop skills in business management and innovation. 	July 2018 to December 2019
5.2	Sustained growth of apparel companies leading to increased jobs.	<ul style="list-style-type: none"> ▪ Implement an apparel district centre of excellence/hub (large physical space) to provide small and medium sized companies with cost-effective training and production space within Metro Vancouver. ▪ Leverage the concentration of apparel companies to initiate shared training, production and innovation spaces to reduce the capital investment burden faced by SMEs. 	January 2020 to December 2021

6.6 TIMING AND DEPENDENCIES

The BC Apparel Workforce Strategy is a multi-faceted, ambitious endeavour. In order to effectively implement five strategic initiatives, all equally critical to ensuring the success of the sector, the initiatives need to be implemented in a staged manner. This is also to recognize the fact that only limited resources are available to achieve a complex list of interconnected priorities. Industry stakeholders provided much feedback related to the timing to ensure things were not overly ambitious.

Based on the strategies and tactics detailed above, the suggested staging and timing is presented in the figure below. Please note that these time-frames indicate only when core activity is occurring or completed. It is not indicative of the full duration of the tactic. Planning and other work for the various initiatives will need to occur prior to full project teams being engaged and implementation begins.





POTENTIAL FUNDING SOURCES

7 POTENTIAL FUNDING SOURCES

In order to implement Phase 4 of the SLMP, the BC Apparel Workforce Strategy, several sources of funding will be required. Seed funding would need to be sought from stakeholders – industry, government and post-secondary institutions. Seed funding would also need to be sought from supplementary funders who could provide sources of one-time funding, grants or endowments.

It is also important to ensure sustainability so that projects continue beyond the seed funding stage. This implies that initiatives started with the seed funding are able to generate sufficient revenues in order to cover anticipated costs.

POTENTIAL WORKFORCE STRATEGY CORE SEED FUNDERS

The strategy implementation will be contingent on core seed funding coming from the three clusters of principal stakeholders - industry, post-secondary institutions and government.

Group	Sub-Group	Organization/Program	Financial	In-Kind
Industry	Employers	<ul style="list-style-type: none"> ▪ Apparel design firms (SMEs) ▪ Apparel manufacturers (SMEs) ▪ Vertically integrated firms (SMEs) ▪ Multi-national corporations (Large) 	X	X
Government	Provincial	<ul style="list-style-type: none"> ▪ Ministry of Jobs, Trade and Technology 	X	
Post-Secondary Institutions	Public Colleges and universities	<ul style="list-style-type: none"> ▪ Emily Carr University of Art and Design ▪ Kwantlen Polytechnic University ▪ Vancouver Community College ▪ University of the Fraser Valley ▪ University of British Columbia ▪ Simon Fraser University 	X	X
	Private colleges	<ul style="list-style-type: none"> ▪ LaSalle College Vancouver 	X	X

POTENTIAL WORKFORCE STRATEGY SUPPLEMENTARY SEED FUNDERS

In addition, there are opportunities to seek additional seed funds from other organizations such as employers who subcontract work to firms in British Columbia, other provincial and federal government agencies engaged in workforce development, job creation, youth employment, employment of under-represented groups, economic growth within communities and education. The sources of these funds will be other agencies and levels of government beyond those identified in the core group above.

Several other organizations exist to support the industry such as associations and service firms. Their ongoing existence requires a thriving Apparel Industry in the province which would entice them to make financial and in-kind contributions to the projects. Furthermore, other community, social benevolent and philanthropic organizations should not be overlooked. Several social-cause themes overlap with the purposes of the SLMP such as entrepreneurship, women in business, training and employment for under-represented groups, and the green economy.

The natural resource, tech, construction / development and apparel industries have also helped to create a large group of high net worth individuals (HNWI) in the province. Many of these individuals operate family offices and private foundations who make regular donations to causes of interest. One goal would

be to help establish an endowment to support sector initiatives. There is likely some opportunity to leverage donations, or interest from an endowment, to create bursaries or trusts that could help support apparel career development.

Group	Sub-Group	Organization/Program	Financial	In-Kind
Industry	Employers	<ul style="list-style-type: none"> ▪ Extra-provincial corporations 	X	X
	Associations	<ul style="list-style-type: none"> ▪ Canadian Apparel Federation ▪ Apparel Connexion 	X	X
	Service Providers	<ul style="list-style-type: none"> ▪ Advisory and consultancy firms ▪ HR services companies ▪ Financial services companies 	X	
Government	Provincial	<ul style="list-style-type: none"> ▪ Ministry of Social Development and Poverty Reduction ▪ Ministry of Advanced Education, Skills and Training ▪ Ministry of Education ▪ Industry Training Authority ▪ WorkSafeBC 	X	
	Federal	<ul style="list-style-type: none"> ▪ Western Economic Diversification ▪ Export Development Canada ▪ Business Development Canada 	X	
	Municipal	<ul style="list-style-type: none"> ▪ Economic development agencies 	X	
Non-Government Organizations	Community groups	<ul style="list-style-type: none"> ▪ MOSAIC ▪ IECBC 	X	X
	Philanthropic	<ul style="list-style-type: none"> ▪ Vancouver Foundation ▪ Tides Canada ▪ High Net Worth Individuals ▪ Family Offices 	X	

POTENTIAL WORKFORCE STRATEGY ONGOING FUNDING (REVENUE)

Within the first two years of launching the strategic initiative projects, there is also the expectation that sufficient revenues are generated from the initiatives so that costs of continued operations of the proposed solutions are covered. This is the true sense of on-going sustainability. A number of revenue sources are available based on the intended design of the initiatives.

Group	Sub-Group	Revenue Type	Financial	In-Kind
Industry	Association	<ul style="list-style-type: none"> ▪ BC Apparel Association <ul style="list-style-type: none"> ○ Membership fees ○ Service fees ○ Sponsorship ○ Donations 	X	X

For example, an association could generate revenue in the following ways to fund project implementation and to provide BC's Apparel Industry with ongoing service delivery.

Membership Fees: First and foremost, the establishment of an industry-led association with a focused value proposition will create a stream of membership revenue. These funds will help provide for the operating costs of the association as well as some service delivery.

Service Fees: A larger source of revenue will come from the association (via the strategic initiatives) delivering value-added services to the industry. These could include a range of activities such as:

- Sponsorship for and fees from industry attendance at conferences, events and showcases
- Fees from training delivery
- Fees from licensing sewing curriculum to training institutions
- Fees from administering certification exams
- Fees from delivering foreign worker immigration application processing services
- Fees from co-op, mentoring and job matching programs
- Fees from program administration
- Fees from incubator or hub rent and services
- Fees from website advertising and job board postings
- Fees from surplus fabric auctions
- Fees from sample production and small manufacturing runs

Some of the examples above are very typical of association work while others are examples of activities currently undertaken by not-for-profits.

Additional previously unidentified revenue sources may become available during implementation.

CHARITABLE STATUS

One element that could potentially help increase funding contributions from private industry is the establishment of the sector body as a charitable organization. This would allow it to issue tax receipts to the benefit of the donor. A secondary option would be to partner with an existing charitable (philanthropic) organization which could receive donations and then make a grant to the apparel association for a particular goal or project.

Charitable status would also further the desire to establish a long-term endowment. The endowment could hold a locked-in capital reserve sufficient enough to generate a moderate revenue stream based on prevailing interest rates or investments.



SUSTAINABILITY (BUDGET ESTIMATES)

8 SUSTAINABILITY (BUDGET Estimates)

This section provides high-level estimated budgets for specific components of the next phase of the BC Apparel SLMP. It explores the costs to implement each of the five strategic initiatives. It also identifies potential seed funding contributions by source. Furthermore, it seeks to identify the revenue potential required to achieve on-going sustainability and to provide guidance to the implementers on how they can ensure the strategic initiatives continue beyond 2021. Further details on the budgets and revenues for sustainability are provided in Appendix A.

These plans were shared with the working groups on July 11, 2017 and reviewed with the Steering Committee on July 24, 2017.

The five strategic initiatives contain some activities with good potential to generate revenue along with others which have limited revenue potential. This will likely require cross-subsidization of specific initiatives with revenue generated by others.

The initiatives also contain two large projects, an apparel incubator/hub and overseas pre-arrival training pilot, which will present different risks and challenges as compared to the other initiatives given their scale and complexity.

A summary budget with an overview of estimated expenditures and revenues is presented below.

OVERALL ESTIMATED BUDGET - SI 1 to SI 5						
Estimated Costs	2017/18	2018/19	2019/20	2020/21	Subtotal	2021 +
People	101,450	614,880	821,060	869,860	2,407,250	784,460
Operations	10,900	263,220	415,820	1,103,320	1,793,260	281,320
Infrastructure	9,000	174,000	359,000	609,000	1,151,000	609,870
Expenditure Sub-total	121,350	1,087,700	1,595,880	2,582,180	5,351,510	1,675,650
Funding Sources						
Employers	80,000	200,000	110,000	230,000	620,000	0
Government	112,825	365,000	295,000	380,000	1,152,825	0
Post-Secondary	0	45,980	45,980	70,980	162,940	0
NGO	0	8,000	8,000	8,000	24,000	5,980
Program Revenue	0	482,000	1,251,500	1,908,100	3,641,600	1,965,380
Revenue Sub-total	192,825	1,100,980	1,710,480	2,597,080	5,601,365	1,971,360
Net	71,475	48,880	114,600	14,900		295,710
Reserve	71,475	120,355	234,955	249,855		

It is estimated that Programs will generate approximately \$3.6 million dollars in revenue between FY 2018 and FY 2021. Ongoing revenue is estimated at \$1.9 million per year. In reviewing the work of other not-for-profits, this figure is believed to be achievable.

From FY 2018 and FY 2021, Government would need to contribute at least \$1.15 million; Employers would need to contribute \$0.6 million (not including membership and service fees); and post-secondary institutions would contribute \$160,000. Post-secondary institutions' funds would be restricted to areas of current focus – building better relations with the industry they serve and increasing the attraction of youth to their programs. Other funds would need to be sourced from other agencies, organizations and partners to cover some infrastructure costs for space and equipment.

The reader should note that these budgets are very preliminary and based on a number of assumptions indicated in the report and further details provided in the appendices. As projects are implemented multiple factors could potentially impact the timing, scope, and activities. More detailed project plans will need to be developed by the project teams as part of the SLMP's implementation phase.

8.1 ESTIMATED BUDGET FOR STRATEGIC INITIATIVE #1

The goal of the first strategic initiative (SI 1) is to establish a sector-led organization, an industry association, to provide critical services to industry stakeholders and to perform key functions to ensure the strategic initiatives are delivered and remain sustainable. Not only does this include implementing and managing a number of projects, but it also includes being the face and coordinating body of BC's Apparel Industry.

SI 1 – ENSURING SUCCESS THROUGH SKILLS DEPLOYMENT AND CONNECTIONS						
Estimated Costs	2017/18	2018/19	2019/20	2020/21	Subtotal	2021 +
People	20,625	156,160	168,360	179,340	524,485	179,340
Operations	7,900	31,400	31,400	31,400	102,100	31,400
Expenditure Sub-total	28,525	187,560	199,760	210,740	626,585	210,740
Funding Sources						
Employers	50,000	0	0	0	50,000	0
Government	50,000	80,000	80,000	40,000	250,000	0
Post-Secondary	0	0	0	0	0	0
NGO	0	8,000	8,000	8,000	24,000	0
Program Revenue	0	75,500	130,900	183,100	389,000	215,400
Revenue Sub-total	100,000	163,500	218,900	231,100	707,500	215,400
Net	71,475	(24,060)	19,140	20,360	87,185	4,660
Carry Forward	0	71,475	47,415	66,555		
Net Net (Reserve)	71,475	47,415	66,555	87,185		

Expenditure Overview:

This initiative's primary cost is the human capital necessary to provide sector leadership as well as the administrative functions required to build a thriving organization that effectively represents the industry and its inherent diversity. These expenditures include the costs of an Executive Director who would be the lead on industry engagement and project oversight. It would also include an administrative officer to help manage the finances of the organization. Both would have to take some responsibility for membership as this would be a key revenue stream to fund other activities in the strategy. These positions, for the purpose of costing, should be considered part-time for this specific initiative, as they are also partially funded in the other initiatives where other activity or work occurs. Also included is a part-time project manager to work on labour support services to match students and job-seekers to available positions.

Revenue Generation:

With respect to revenue potential, the organization, via SI 1, will primarily generate funds through association membership, as well as through service fees from labour programs. It will be up to the association to define a membership structure; however, it has to be priced correctly so supporters

contribute and derive value from the programs or solutions offered. Much of the value will come from providing the services detailed in the strategies.

That being said, like any start-up, for the association to begin quickly, and take on an effective role early on, seed capital would be needed from both industry and government. In subsequent years of the labour market partnership, industry's direct contribution would be replaced by membership fees paid to the association and used to fund the strategic initiatives.

Labour programs, with the association almost acting as an employment agency, could generate revenue through client job advertisements as well as placement fees. The organization would also be able to earn revenue from advertising on its website and/or newsletter for services.

Risk Mitigation:

The additional goal with the seed funding should be to establish a trust, or a restricted fund able to earn interest but to be available in cases of emergency. The board of the association should ensure that regular contributions are made to the trust and withdrawals are only made in exceptional circumstances. Ideally this fund should hold a minimum of 6-months operating capital (\$105,000) as restricted funds and then seek to build up any additional surpluses or donations to create scholarships or for other beneficial programming for the industry.

Office space for the association, until a larger industry hub is developed, could be donated or subsidized by another industry stakeholder such as a peer association, a company or a post-secondary institution. If the new apparel association shares space with a peer there could also be potential to cost share support resources such as an administrative person and operating costs.

8.2 ESTIMATED BUDGET FOR STRATEGIC INITIATIVE #2

The second strategic initiative (SI 2) seeks to reduce the vacancies in the BC Apparel Industry's critical occupations. The short and medium-term goal is to increase the industrial capacity, primarily skills-needs through immigration support and standardized training, along with productivity growth.

SI 2 – INCREASING SKILLED LABOUR CAPACITY						
Estimated Costs	2017/18	2018/19	2019/20	2020/21	Subtotal	2021 +
People	80,825	337,940	480,680	486,780	1,386,225	401,380
Operations	3,000	45,000	190,500	346,000	584,500	29,000
Infrastructure	9,000	109,000	109,000	109,000	336,000	109,870
Expenditure Sub-total	92,825	491,940	780,180	899,080	2,264,025	540,250
Funding Sources						
Employers	30,000	70,000	60,000	50,000	210,000	0
Government	62,825	80,000	70,000	60,000	272,825	0
Post-Secondary	0	0	0	0	0	0
NGO	0	0	0	0	0	0
Program Revenue	0	372,000	670,000	785,000	1,827,000	820,000
Revenue Sub-total	92,825	522,000	800,000	895,000	2,309,825	820,000
Net	0	30,060	19,820	(4,080)	45,800	279,750
Carry Forward	0	0	30,060	49,880		
Net Net (Reserve)	0	30,060	49,880	45,800		

The six individual tactics in SI 2 can be grouped into four clusters:

- 1) Immigration and labour services;
- 2) Curriculum, training and certification for key positions;
- 3) Pre-arrival training; and
- 4) Productivity enhancements.

The first two items were deemed the highest priority by the working groups and coincidentally offer the best chance for a sector organization to generate revenue through training and service fees. The immigration service would be able to handle most position types right away.

Expenditure Overview:

A key component of this strategic initiative will be the establishment of a dedicated immigration resource team to support BC's apparel industry to source and attract talent from overseas, navigating processes and supporting applications.

This initiative will also require significant human capital to develop training programs and to teach; administer certifications; manage the immigration application and labour recruitment process; deliver overseas pre-arrival training programs; and provide business advisory services and training related to productivity. A training pilot program would be built around the immediate need for industrial sewing machine operators and expanded from there to other skill areas.

The largest expense component of this strategic initiative is the pre-arrival training pilot. This component involves establishing an overseas training program to help bring additional skilled workers as permanent residents to Canada to fill critical vacancies. The goal is to validate if pre-arrival training will accelerate entry of new-Canadians into the workforce by increasing job readiness, enhancing skills recognition and reducing settlement barriers. The budget includes \$1 million for the first year of a pre-arrival pilot.

The strategy seeks to implement this component in early 2020 to allow sufficient time to observe how well other tactics within SI 1 are able to address the workforce challenges in the shorter-term. If required, the pre-arrival training component could be scaled back or increased as circumstances dictate.

Revenue Generation:

Revenue will come from a few sources. First, given the significant fees charged by registered immigration consultants, there is potential for the sector organization to earn fees by providing critical immigration related services, through its own registered immigration resource, at a much lower cost to clients. This would include labour recruitment applications for work permits and permanent residency across all types of positions in demand by industry.

Second, there is the option to license the industry-defined and standardized curriculum, beginning with sewing, to training institutions. Tuition fees can be charged for training sewers, utilizing the same curriculum. The sector organization can also earn fees to administer skills examinations and the awarding of certifications.

It is not expected that the pre-arrival training program would generate revenue but it would create a labour pool that could indirectly generate incremental revenue from the immigration and labour recruitment service. Given that the program seeks to improve settlement and labour attachment for new Canadians, this component could also qualify for funding from Immigration, Refugees and Citizenship Canada, Employment and Social Development Canada, and possibly BC's Ministry of Social Development and Poverty Reduction.

Risk Mitigation:

As stated above, the generation of revenue in SI 2 is critical to the sustainability of the other initiatives which will be subsidized from this revenue. SI 2 also includes the pilot project for the overseas training. Though the pilot is included in the prospective budget, if the pilot was deemed successful, then a new proposal would have to be submitted to funders. The pre-arrival training is also an element identified by the working groups which could be postponed if its projected expenditures were to have a negative impact on the sustainability of other elements.

8.3 ESTIMATED BUDGET FOR STRATEGIC INITIATIVE #3

The third strategic initiative (SI 3) is focused on increasing engagement and drawing more youth and under-represented groups into jobs in the industry. BC's Apparel Industry needs to continue to build an attractive brand to recruit talent for long-standing sustainable and rewarding careers.

SI 3 – EXPANDING YOUTH AWARENESS OF APPAREL OPPORTUNITIES						
Estimated Costs	2017/18	2018/19	2019/20	2020/21	Subtotal	2021 +
People	0	42,700	26,840	52,460	122,000	9,760
Operations	0	174,920	118,920	388,920	682,760	123,920
Infrastructure	0	0	0	0	0	0
Expenditure Sub-total	0	217,620	145,760	441,380	804,760	133,680
Funding Sources						
Employers	0	50,000	50,000	180,000	280,000	0
Government	0	85,000	70,000	210,000	365,000	0
Post-Secondary	0	25,000	25,000	50,000	100,000	0
NGO	0	0	0	0	0	0
Program Revenue	0	5,000	25,000	30,000	60,000	40,000
Revenue Sub-total	0	165,000	170,000	470,000	805,000	40,000
Net	0	(52,620)	24,240	28,620	240	(93,860)
Carry Forward	0	0	(28,380)	240		
Net Net (Reserve)	0		0	240		

Expenditure Overview:

This strategic initiative is primarily a branding exercise to promote the industry to the public, more specifically youth and other under-represented groups. The first action will be for industry stakeholders to work with a brand consultant to define and position the industry with its target audience. Once a brand is defined, the initiative will involve creation of a website along with appropriate and engaging video and multi-media content. Content will be disseminated through social and print media where applicable. Tools

will also be created for educators. Career showcase events are also envisioned to promote the industry and its opportunities to youth.

Beyond the marketing component, the youth component could also include the establishment of a trades training for youth program within the secondary school system. A pilot program would be established in a small number of schools to expose youth to apparel careers in four regions of the province – Metro Vancouver, Fraser Valley, Kelowna and Greater Victoria. The primary expenditure is making sure schools have modern space, equipment and materials for training.

Revenue Generation:

As a marketing initiative, typical marketing revenue streams would exist. For example, stakeholders will be able to purchase advertising space or sponsorship opportunities related to websites and career showcases. Video content could be sponsored by industry or third-party stakeholders.

A complementary source of revenue for SI 3 will come from contributions or sponsorship related to donations or purchases of equipment and materials. These donations from industry and post-secondary institutions would be matched from other government programs beyond the SLMP including funding programs from the Industry Training Authority and the Ministry of Education.

Risk Mitigation:

This strategic initiative offers a lot of in-kind opportunities for employers and post-secondary institution partners to contribute staff and marketing resources which can help significantly reduce costs.

It is also the most likely strategy to resonate with philanthropic partners as it relates to a number of interconnected issues - youth, education and skills development – potentially reinforcing the need for an endowment which can be used to support these types of initiatives.

8.4 ESTIMATED BUDGET FOR STRATEGIC INITIATIVE #4

The fourth strategic initiative (SI 4) seeks to better align post-secondary institution activity with the true needs of industry. It seeks to improve the dialogue between industry stakeholders and the post-secondary institutions to build better relationships, increase understanding and create stronger programs.

SI 4 – STRENGTHENING POST-SECONDARY INSTITUTIONS' ALIGNMENT WITH INDUSTRY						
Estimated Costs	2017/18	2018/19	2019/20	2020/21	Subtotal	2021 +
People	0	10,980	10,980	10,980	32,940	10,980
Operations	0	30,000	15,000	35,000	80,000	5,000
Infrastructure	0	0	0	0	0	0
Expenditure Sub-total	0	40,980	25,980	45,980	112,940	15,980
Funding Sources						
Employers	0	0	0	0	0	0
Government	0	20,000	20,000	20,000	60,000	0
Post-Secondary	0	20,980	20,980	20,980	62,940	10,000
NGO	0	0	0	0	0	0
Program Revenue	0	0	0	0	0	5,980
Revenue Sub-total	0	40,980	25,980	45,980	112,940	15,980
Net	0	0	0	0	0	0

Expenditure Overview:

Much of the activity to improve alignment is conducted through meetings and round-tables. One direct cost would be for one or more facilitators to deliver the summits and round-tables. Other indirect costs linked to this initiative include a portion of the compensation for an apparel sector organization Executive Director, given the role expectations for such a position include being the face and coordinator of the industry.

Revenue Generation:

These activities do not have the strong potential to generate revenue unless they are attached to broader events where generating sponsorship is possible. A good example of this is the industry summit or the on-going BC Apparel Camp.

Risk Mitigation:

However, because a fair component of the activity is simply meetings, much of the costs could be attributed as in-kind. For example, post-secondary institutions could contribute space for events. Incidental costs could be limited to catering and other small expenses.

On-going revenue generation to ensure sustainability is not critical for this initiative given the low recurring costs. The ongoing costs can likely be absorbed within the budgets for existing initiatives or supported in-kind by post-secondary institutions and corporate partners. Having the post-secondary institutions work together will also reduce the burden on their individual institutional budgets.

8.5 ESTIMATED BUDGET FOR STRATEGIC INITIATIVE #5

The fifth strategic initiative is probably the most ambitious. It entails establishing an apparel incubator and then subsequently expanding it into a broader apparel hub with a wider variety of business support services. The goal is to build the next generation of leaders and help the ongoing groups of small businesses grow.

SI 5 – ACCELERATING GROWTH OF APPAREL LEADERSHIP TALENT						
Estimated Costs	2017/18	2018/19	2019/20	2020/21	Subtotal	2021 +
People	0	67,100	134,200	183,000	384,300	183,000
Operations	0	41,900	60,000	302,000	403,900	92,000
Infrastructure	0	65,000	250,000	500,000	815,000	500,000
Expenditure Sub-total	0	174,000	444,200	985,000	1,603,200	775,050
Funding Sources						
Employers	0	80,000	0	0	80,000	0
Government	0	100,000	75,000	50,000	225,000	0
Post-Secondary	0	0	0	0	0	0
NGO	0	0	0	0	0	0
Program Revenue	0	30,000	425,600	910,000	1,365,600	920,000
Revenue Sub-total	0	210,000	500,600	960,000	1,670,600	
Net	0	36,000	56,400	(25,000)	67,400	144,950
Carry Forward	0	0	36,000	92,400		
Net (Reserve)	0	36,000	92,400	67,400		

Expenditure Overview:

The largest cost in this initiative is the physical space to host an incubator and hub. Another large cost component is the one-time start-up costs. Given the high cost of commercial/industrial property in Greater Vancouver this will be the most significant concern for the project across all five strategic initiatives. There will be additional operational costs to deliver support services to the apparel clients inside the incubator/hub.

Amounts for purchasing a building or performing tenant improvements are not included in this budget. Only the estimated annual lease costs are included.

Revenue Generation:

The biggest demand will be to generate capital for start-up expenses. Beyond the SLMP partners' funding additional seed capital for this project will need to be found by way of a government grant for infrastructure or centres of excellence. Federal and municipal agencies will need to be approached.

Operating revenue will primarily come from the rents and service fees paid by small enterprises and entrepreneurs residing in the incubator. As the incubator expands to a larger hub the goal will be to expand the availability of services. For example, the provision of co-located services such as a shared designer, photographer and small manufacturing operation. Stakeholders have also suggested that the hub include a showcase space to market and promote brands, serving as a retail operation.

Risk Mitigation:

The concept behind the apparel hub is to take advantage of industrial space that provides a welcoming cluster for apparel companies currently being displaced from areas undergoing gentrification. An agreement needs to be reached with an amenable property developer to develop vertical light industrial space. The developer or landlord will earn rent from on-going operations of larger businesses in the complex while the incubator located in the same building could pay less-than-market rent with the understanding that if these businesses succeed they can become new tenants in the building.

The federal government, through the Department of Innovation, Science and Economic Development; the Department of Employment and Social Development; and Western Economic Diversification should be approached as part of the efforts to source start-up capital.

Alternate models could also include sub-contracting hub operations to a service office provider. Additionally, instead of establishing and providing co-located services directly, the same outcomes could potentially be achieved by simply subleasing the space to existing service providers.



9

EVALUATION

9 EVALUATION

The next phase of the BC Apparel Sector Labour Market Partnership is to action specific projects to deliver the proposed strategies and tactics to positively affect change in the industry's workforce.

The four working groups have come up with detailed goals, objectives and specific tactics in order to implement the five strategic initiatives to address the labour market issues previously identified in the *BC Apparel Industry Market Partnership Labour Market Information Research Report September 2016*, produced during Phase 2 of this project.

This evaluation framework is a necessary component of the overall BC Apparel Workforce Strategy in order to allow that evaluation to determine the return on investment and the impact of the strategic initiatives on resolving the apparel workforce challenges. This evaluation framework is a necessary component of the overall BC Apparel Workforce Strategy in order to allow that evaluation to determine the return on investment and the impact of the strategic initiatives on resolving the apparel workforce challenges. This evaluation should occur in the 2021 to 2022 time-frame after a sufficient period of time for implementation and adjustment has occurred. This section details a proposed standardized evaluation framework.

The evaluation framework was shared with the working groups on July 11, 2017 and reviewed with the Steering Committee on July 24, 2017.

9.1 EVALUATION FRAMEWORK

In order to evaluate the strategy, the target groups of the program and the intended outcomes have been defined through the working group process. An evidence-based evaluation framework involves measuring the extent to which these outcomes are achieved.

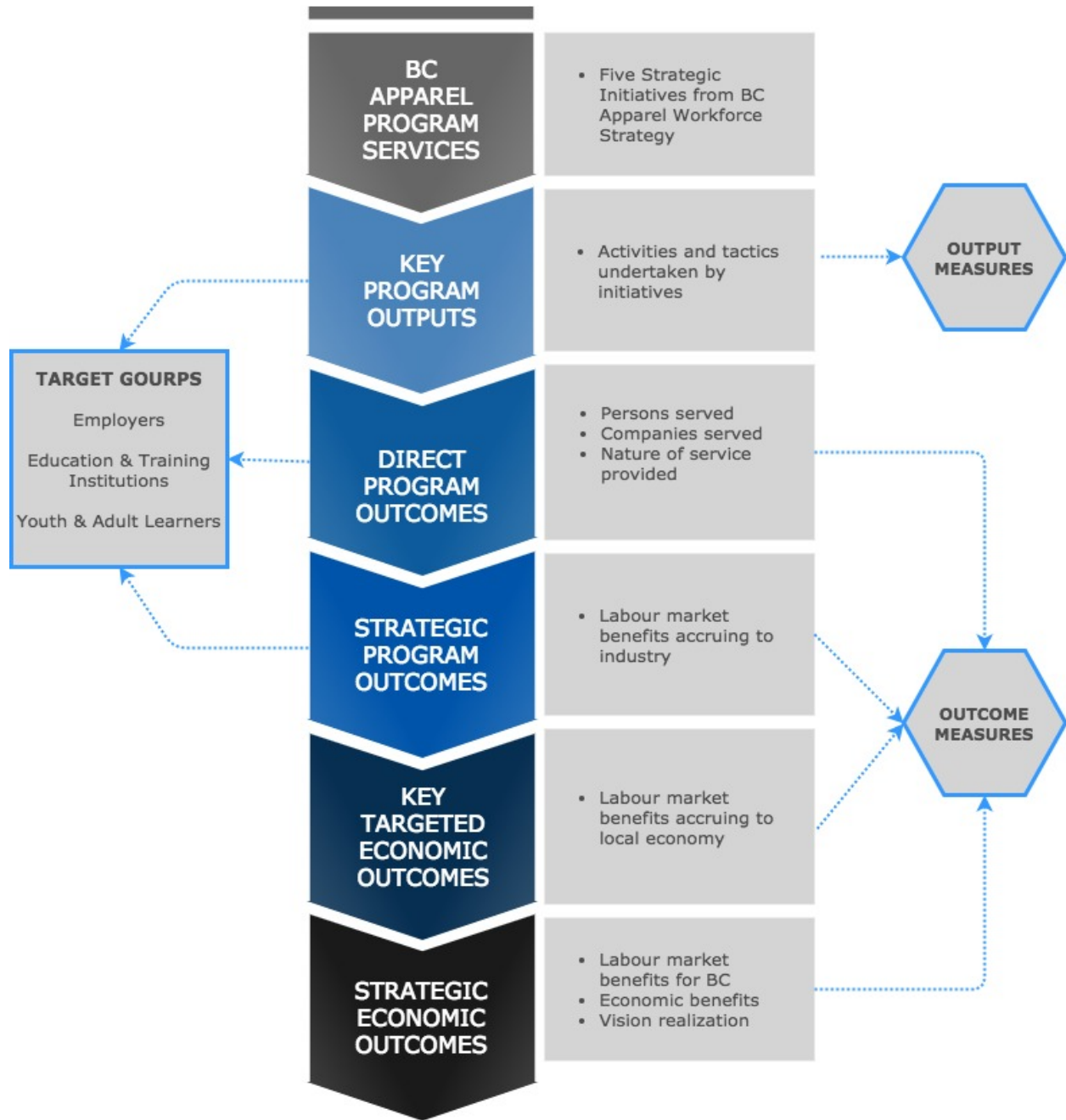
Figure 1 below illustrates the proposed evaluation framework in the form of a program logic model. The model lays out the components for the evaluation:

1. Inputs – what resources will go into the apparel strategic initiatives to achieve results
2. Activities – what the program does (materials, training, certifications)
3. Outputs – what is produced through these activities (people trained, certified, hired)
4. Outcomes – the changes and benefits that result from the program (increased skills, additional employment and production, increased capabilities)

The target groups for the BC Apparel Strategy are the following:

- Apparel employers in British Columbia
- Education and training institutions
- New entrants to the labour market
- Students and adult learners
- New immigrants
- Employment and support services for the Apparel Industry

FIGURE 1: EVALUATION FRAMEWORK CONCEPT



9.2 OUTCOME-BASED PROGRAM EVALUATION

A challenge of evaluating the impact of the BC Apparel Workforce Strategy is the difficulty in establishing the causal relationships between the program activities and outputs, and the outcomes. Establishing the causal links between program activities and the broader labour market and economic outcomes is more difficult as many independent factors will impact economic outcomes, regardless of how effective the BC Apparel Workforce Strategy initiatives are. Integrating evidence of program outcomes is important; and the evaluation of the strategy should be aligned with current initiatives of the BC Government.

Evaluating the impact of the BC Apparel Workforce Strategy requires differentiating between the outputs and outcomes. In this regard, the outputs are the operational mechanisms that influence the outcomes. The outcomes describe the intended impact of the Strategy on target groups and reflect performance in terms of achieving the needs of these target groups. Laying out the relationship among the Strategy's program outputs, outcomes and broader economic outcomes will enable the measurement and validation of the BC Apparel Workforce Strategy program design to determine whether the initiatives and services are making a difference in meeting the economic outcomes.

The program evaluation addresses the following higher-level questions:

- How engaged or involved have stakeholders been in strategy implementation?
- How have the workforce challenges of the industry been reduced by the Strategy?
- How are Strategy outcomes contributing to broader economic and social outcomes?
- How are the goals contributing to the Strategy outcomes?
- How are outputs contributing to the achievement of goals?
- Which activities or initiatives are providing the most value and having the greatest impact on the goals and outcomes?
- Are resources being allocated to the strategic initiatives in the proper mix to maximize positive outcomes?
- Are the strategic initiatives set-up to be sustainable to continue the results delivery beyond the life-cycle of the sector LMP?
- Have any new labour market issues surfaced that were not previously identified?

In this context, program evaluation is confined to the activities that take place within the parameters of the strategic initiatives driving the goals and outcomes. The Strategy itself can only be evaluated by the extent that the strategic initiatives achieve the corresponding goals. The overall objective of the Strategy is to achieve the strategic and targeted economic outcomes. These are, in turn, the result of realizing the tactical initiatives.

Figure 2 lays out these relationships, delineating the scope for the BC Apparel Workforce Strategy program boundaries.

FIGURE 2: BC APPAREL WORKFORCE STRATEGY LOGIC MODEL



9.3 OUTPUTS, GOALS AND OUTCOMES

The strategic initiatives in the BC Apparel Workforce Strategy are linked to specific goals which are associated with outcomes and tactics or activities that will help lead to the realization of the outcomes. The outcomes are the desired impact resulting from achieving the goals.

The goals are the ultimate factor for the evaluation of the BC Apparel Workforce Strategy as they provide over-arching metrics or targets used to measure performance.

The outputs will also provide an intermediate set of success parameters that show progress towards achieving the goals. A series of measurement instruments will need to be applied to determine the extent to which these goals are achieved.

Each output is associated with a series of specific actions (tactics) which can also serve as potential performance milestones.

For example, Strategic Initiative #4 has an outcome to strengthen post-secondary program alignment with the needs of industry. This is elaborated through the goal of improved dialogue to increase understanding of skills (training) and innovation (research) needs in order to produce better alignment with and harmonization of the post-secondary programs related to apparel. The dialogue will be improved by completing a series of actions such as hosting of meetings, participation in round-tables and exchanges of information.

Program elements and implementation activities for each of the goals have been developed with associated budgets and timeframes for implementation, starting in September 2017 and running through to 2021.

Figure 3 below provides details on the direct outputs, goals and program outcomes from the strategic initiatives.

Appendix B provides the full application of the Logic Model for the BC Apparel Workforce Strategy, with the greater details on the strategic initiatives, outcomes, goals, and tactics.

FIGURE 3: BC APPAREL SLMP STRATEGIC INITIATIVES AND OUTCOMES

BC Apparel Sector LMP Strategic Initiatives				
1. Ensuring Success and Linking Skills Deployment to Innovation and Global Branding	2. Increasing Skilled Labour Capacity	3. Expanding Youth Awareness of Apparel Opportunities	4. Strengthening Post-Secondary Alignment with Industry	5. Accelerating Growth of Apparel Leadership Talent
Direct Outputs				
Established an association to, in the first instance, address the BC Apparel Industry's workforce needs.	Created resource to support immigration needs of SMEs.	Built a collective brand and public information source for BC's Apparel Industry.	Improved post-secondary understanding of BC apparel skills and innovation needs.	Increased number of top apparel design and manufacturing leaders in BC.
Implemented additional programs to address workforce needs.	Implemented a provincial immigration Fast-Track pilot program to fill critical vacancies.	Created a toolkit to support educators at BC schools.	Better aligned post-secondary educational programs (design, engineering and science) with industry needs.	Sustained growth of apparel companies leading to increased jobs.
Identified other complementary resources and initiatives to support apparel workforce needs and job growth.	Defined competency framework and industry managed certification for Industrial Sewers and other technical positions.	Implemented an apparel specific career fair.	Better aligned post-secondary research and development with industry challenges.	
	Increased number of seats for training of sewers and other technical positions.	Implemented an industry supported education and employment program at BC schools.		
	Implemented an immigration pre-arrival pilot program to help industry collectively fill critical vacancies.			
	Increased industrial productivity of BC apparel manufacturers.			
Goals				
To increase the domestic industrial capacity by engaging more design, product development and manufacturing talent.	To continue industry engagement, manage complementary labour programs, and build connections with reinforcing initiatives.	To increase the awareness of the BC Apparel Industry and the diverse and dynamic career opportunities within.	To increase dialogue and strengthen relationship between post-secondary institutions and industry.	To develop and strengthen the next generation of apparel leadership in British Columbia and support growth of apparel companies
Outcomes				
BC Apparel Industry's short-term and medium-term vacancies of critical positions are filled with skilled workers and productivity is improved.	BC Apparel Industry strategic initiatives are coordinated, add value to industry and continue beyond 2021.	A greater number of youth and under-represented groups choose to enter BC's apparel workforce.	The province's post-secondary programs are well-aligned with BC Apparel Industry's skills and innovation needs.	BC Apparel Industry gains an increased number of business-savvy leaders to contribute to the growth of the industry.

9.4 KEY PERFORMANCE INDICATORS

The Key Performance Indicators are measures of the progress towards the outcomes. The indicators are crucial to program evaluation and the evaluation framework. The Key Performance Indicators are designed to measure the program based on efficiency, quality and effectiveness:

- Efficiency indicators assess the value of an outcome or output relative to the cost of the inputs required to provide it. These indicators are likely the most simplistic and can include evaluating progress against the proposed budgets and timelines included in the report.
- Quality indicators compare the value of an outcome or output with a defined standard. In some cases, the assessment against a standard or rule may be subtle. Standards may not exist but some comparative benchmarking may also be done to evaluate success against that of similar programs in peer jurisdictions or related programs from other sector labour market projects occurring in BC.
- Effectiveness indicators assess the contribution of an outcome or output to a higher-level outcome in the evaluation framework. Many of these effectiveness indicators, and likely the bulk of the success criteria utilized in Phase 5, will come from reviewing the goals and outputs in each of the strategic initiatives.

Each of the outcomes in the strategy requires a series of events in order to occur. As a result, two sets of discrete effectiveness performance indicators can be used to help evaluate the degree of success in achieving the outcomes.

First, the goals can be measured using the associated targets for each strategic initiative. The targets are each action oriented, time-based and have a quantitative metric which roll up to supporting the outcomes. They further constitute measureable standards of performance for the purposes of evaluating outcome achievement.

Second, the tactics are a group of specific actions to implement a strategic initiative. Each tactic in itself is one step towards achieving the corresponding outcome that has been identified by the strategy. The tactics provide guidance to operationalize each strategic initiative and form the key program elements that can be funded, acted on and delivered. The tactics have timelines and are actions which can be identified as having taking place or not. Therefore, the output from each tactic is both objectively confirmable and measureable.

Performance indicators are indicated in Figure 4.

FIGURE 4: BC APPAREL WORKFORCE STRATEGY PERFORMANCE INDICATORS

STRATEGIC INITIATIVES				
1. Ensuring Success Through Skills Deployment and Connections	2. Increasing Skilled Labour Capacity	3. Expanding Youth Awareness of Apparel Opportunities	4. Strengthening Post-Secondary Institutions' Alignment with Industry	5. Accelerating Growth of Apparel Leadership Talent
PERFORMANCE GOAL				
To continue industry engagement, manage complementary labour programs, and build connections with reinforcing initiatives.	To increase the domestic industrial capacity by engaging more design, product development and manufacturing talent.	To increase the awareness of the BC Apparel Industry and the diverse and dynamic career opportunities within.	To increase dialogue and strengthen relationship between post-secondary institutions and industry	To develop and strengthen the next generation of apparel leadership in British Columbia and support growth of apparel companies
TARGET				
A self-funding industry body, with sustainable revenues derived from in-demand workforce solutions is in place by December 2020.	Between 2018 and 2025 introduce annually to BC's labour force: <ul style="list-style-type: none"> 125 other apparel professionals 250 new industrial sewers 	By December 2019, via youth surveys, to show a 200% increase in "Favourable Consideration of Careers in the Apparel Industry" over those identified in the Sector LMP Phase 2 report. By December 2020, via post-secondary data and job vacancy rates, show a 20% increase in new student registrations and a job vacancy rate decline of 10% over those figures identified in the Sector LMP Phase 2 report.	By June 2019, via industry survey, to show a 50% improvement in CEO satisfaction scores over those identified in the Sector LMP Phase 2 report.	By September 2020, establish a centre of excellence for that provides tools and programs to grow apparel leadership and innovation.
INDICATOR				
<ul style="list-style-type: none"> Number of members Number and scale of revenue generating and profitable services Number and types of established strategic partnerships 	<ul style="list-style-type: none"> Job vacancy rate in the industry Number of sewers trained and placed Number of apparel professionals placed Number of post-secondary graduates hired Productivity/Value Creation Index scores 	<ul style="list-style-type: none"> Reach of campaigns Number of positive survey respondents Number of new student registrations in post-secondary programs Number of new student registrations in technical programs 	<ul style="list-style-type: none"> Satisfaction score of CEOs Number of post-secondary graduates hired for specific positions Number of post-secondary and industry partnerships Number of innovation collaborations 	<ul style="list-style-type: none"> Number of companies residing in centre Number of program participants Number of mentors Satisfaction score of participants
2021 OUTCOME REPORTING				
BC Apparel Industry strategic initiatives are coordinated, add value to industry and continue beyond 2021.	BC Apparel Industry's short-term and medium-term vacancies of critical positions are filled with skilled workers and productivity is improved	A greater number of youth and under-represented groups chose to enter BC's apparel workforce.	The province's post-secondary programs are well-aligned with BC Apparel Industry's skills and innovation needs.	BC Apparel Industry gains an increased number of business-savvy leaders to contribute to the growth of the industry.



10

NEXT STEPS

10 NEXT STEPS

The Phase 3 was long and complex with four different working groups looking at a number of interesting workforce challenge topics. Ultimately, the process arrived at a group of five strategic initiatives which were reviewed by the Steering Committee and approved on August 3, 2017. The final report was approved by the Steering Committee on August 23, 2017.

Individually, each initiative is its own significant project; however, all five are interconnected making for a very ambitious project. The five strategic initiatives need to be implemented collectively in order to achieve the level of success desired by stakeholders and to have the desired economic outcomes. Phase 4 will also likely be dependent on a number of actions that must occur "inter-Phase".

First, the BC Apparel Association is still in a nascent stage of its development. It is anticipated that the sustainability of the strategic initiatives will need a strong central industry body. Establishing an association is a full-time job. The interim board, a small group of dedicated volunteers, has been active through the summer of 2017. Their goal is to have an organization fully established in the autumn with the support of industry. An Executive Director would be in place by the spring of 2018.

Second, there is an opportunity to bring together the existing SLMP existing Steering Committee with the expanding BC Apparel board. This will link together two similar groups to better harness the passions and energy necessary for the SLMP to continue.

Third, the SLMP efforts need to ensure alignment with the parallel initiative of the Big 4 firms to foster a Global Centre of Excellence for Premium and Performance Apparel in BC(GCEPPA-BC). This is a much broader and ambitious project that goes beyond addressing skilled labour shortages; however, it shares certain goals to ensure a sustainable and dynamic apparel industry in the province. Representatives from BC Apparel and the GCEPPA-BC are already discussing how to better align their initiatives.

Fourth, a coordinated effort will be required to find industry's contribution to the seed funding. Phase 4 requires that industry make a cash contribution, along with the government funding, as an investment to jointly benefit the sector. Confirming these sources of funds will be critical before Phase 4 components can commence.

Based on the above points, stakeholders may wish to consider submitting more than one Phase 4 application. This could allow the BC Apparel SLMP project to proceed in stages if a single and large application was deemed too arduous.

The goal is to submit at least one Phase 4 application in the autumn of 2017 in order to keep advancing solutions to help the industry grow.



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TABLE A.1A - ESTIMATED EXPENDITURES FOR (SI 2) ENSURING SUCCESS THROUGH SKILLS DEPLOYMENT AND CONNECTIONS

Initiative	Item	Notes	2017	2018	2019	2020	Subtotal	2021	
							Start-up	Ongoing	
1.1	Establish Association	Executive Director	Executive Director (part-time in early years) @ \$90,000 FTE + 22% MERCS/overhead for representation of industry, coordination and senior project management. Lead all SI 1.0 through 5.0 but also acts as Project Manager for SI 1.1, 1.3, 2.2 and 4.2; in addition to selling memberships. Future years would involve more governance as scope and budget increases SHARED WITH 1.3, 2.2 and 4.2	13,725	65,880	65,880	76,860	222,345	76,860
		Administrative Officer (A) Senior	Part-time/Full-time admin position @ \$45,000 FTE + 22% MERCS/overhead to handle financial, administrative and operational duties. Would also be responsible for membership support.	6,900	54,900	54,900	54,900	171,600	54,900
		Operations	Supplies, materials and services	2,500	14,000	14,000	14,000	44,500	14,000
		Space	600 sq. ft. office space, utilities, etc.	5,400	17,400	17,400	17,400	57,600	17,400
			28,525	152,180	152,180	163,160	496,045	163,160	
1.2	Workforce Programs	Project Manager (C)	Full-time (75% of FTE in years 2+) program position @ \$40,000 FTE + 22% MERCS/overhead SHARED WITH 3.3 (25%)	0	24,400	36,600	36,600	97,600	36,600
			0	24,400	36,600	36,600	97,600	36,600	
1.3	Culture and Tourism	Executive Director (see above)	Executive Director @ \$90,000 FTE + 22% MERCS/overhead for representation of industry, coordination and senior project management. Lead all SI 1.0 through 5.0 but also acts as Project Manager for 1.1, 1.3, 2.2 and 4.2; in addition to performing policy and regulatory consultations, planning and coordination SHARED WITH 1.1, 2.2 and 4.2	0	10,980	10,980	10,980	32,940	10,980
			0	10,980	10,980	10,980	32,940	10,980	
Subtotal			28,525	187,560	199,760	210,740	626,585	210,740	

TABLE A.1B - ESTIMATED REVENUES FROM (SI 2) ENSURING SUCCESS THROUGH SKILLS DEPLOYMENT AND CONNECTIONS

Initiative	Item	Notes	2017	2018	2019	2020	Subtotal	2021	
							Start-up	Ongoing	
1.1	Establish Association	Annual membership fees	Assumes a tiered level of membership (\$10,000 -large corp., \$2,000 - medium firm, \$500 - small firm and \$50 - student) with membership growing from 60 to 230 over 4 years.	0	75,000	112,500	137,500	325,000	150,000
				0	75,000	112,500	137,500	325,000	150,000
1.2	Workforce Programs	Job Board fees	Based on approximately 100 job postings per year	0	0	10,000	12,000	22,000	15,000
		Employment program fees	Based on 20-40 staffing/recruitment support transactions	0	0	8,400	33,600	42,000	50,400
				0	0	18,400	45,600	64,000	65,400
1.3	Culture and Tourism	Events	Potential for sponsorship opportunities not included as events are currently owned and delivered by other organizations and partnerships need to be established.	0	0	0	0	0	0
				0	0	0	0	0	0
Subtotal			0	75,000	130,900	183,100	389,000	215,400	

TABLE A.2A - ESTIMATED EXPENDITURES FOR (SI 2) INCREASING SKILLED LABOUR CAPACITY

Initiative	Item	Notes	2017	2018	2019	2020	2021		
							Subtotal Start-up	Ongoing	
2.1	Immigration Resource	Immigration Professional	Full-time Registered Immigration Consultant @ \$80,000 FTE + 22% MERCS/overhead	24,400	97,600	97,600	97,600	317,200	97,600
		Administrative Officer (B)	Full-time clerk position @ \$40,000 FTE + 22% MERCS/overhead	0	48,800	48,800	48,800	146,400	48,800
		Administrative Officer (C)	Full-time clerk position @ \$40,000 FTE + 22% MERCS/overhead	0	0	48,800	48,800	97,600	48,800
		Program operations	Office supplies, printing, copying, courier and communication services	3,000	10,000	14,000	14,000	41,000	14,000
		Space	1,000 sq. ft. office space, utilities, etc.	9,000	29,000	29,000	29,000	96,000	29,870
			36,400	185,400	238,200	238,200	698,200	239,070	
2.2	Immigration Fast-track	Executive Director	Part-time Executive Director @ \$90,000 FTE + 22% MERCS/overhead for representation of industry, coordination and senior project management. Lead all SI 1.0 through 5.0 but also acts as Project Manager for 1.1, 1.3, 2.2 and 4.2 SHARED WITH 1.1, 1.3 and 4.2	13,725	21,960	21,960	10,980	68,625	10,980
			13,725	21,960	21,960	10,980	68,625	10,980	
2.3	Sewing Curriculum	Project Manager (A)	Part-time position @ \$70,000 FTE + 22% MERCS/overhead to lead SI 2.2-2.3, 2.5.	42,700	42,700	42,700	42,700	170,800	42,700
			42,700	42,700	42,700	42,700	170,800	42,700	
2.4	Sewing Training	Instructor/Trainer (A)	Full-time instructor position @ \$60,000 FTE + 22% MERCS/overhead	0	73,200	73,200	73,200	219,600	73,200
		Instructor/Trainer (B)	Half-time instructor position @ \$60,000 FTE + 22% MERCS/overhead	0	36,600	36,600	36,600	109,800	36,600
		Equipment and Supplies	Initial purchase and installation of equipment followed by annual maintenance and replacement	0	30,000	10,000	10,000	50,000	10,000
		Program Operations	Operating costs beyond equipment and supplies	0	5,000	5,000	5,000	15,000	5,000
		Space and Utilities	4,000 sq. ft. training centre	0	80,000	80,000	80,000	240,000	80,000
			0	224,800	204,800	204,800	634,400	204,800	
2.5	Pre-arrival Training Pilot	Project Manager (B) / Curriculum Developer	Full-time position @ \$70,000 FTE + 22% MERCS/overhead to lead SI 2.5, 3.2 & 3.4 SHARED WITH 3.2 and 3.4	0	0	68,320	42,700	111,020	0

TABLE A.2A - ESTIMATED EXPENDITURES FOR (SI 2) INCREASING SKILLED LABOUR CAPACITY

Initiative	Item	Notes	2017	2018	2019	2020	Subtotal	
							Start-up	2021 Ongoing
	Online training	Web/App development for pre-assessments, online training and testing	0	0	80,000	20,000	100,000	0
	Travel	Pre-work to select pilot-location, identify partners and set-up program. Ongoing compliance and program audit visits. (\$4,500 per trip)	0	0	13,500	27,000	40,500	0
	Partnership fees	Participant recruitment	0	0	15,000	60,000	75,000	0
	Local classrooms	Reimbursement for training space	0	0	20,000	80,000	100,000	0
	Local Instructors	Instructor payment (2 per overseas location @ \$30,000)	0	0	15,000	70,000	85,000	0
	Other (Allowance)	Could include student allowances of \$15/day while in training which exceeds minimum wages paid in sample countries such as Philippines, China, India, Vietnam, Nigeria, Mexico, Brazil	0	0	18,000	60,000	78,000	0
			0	0	229,820	359,700	589,520	0
2.6	Productivity Support	Project Manager (A)	0	17,080	42,700	42,700	102,480	42,700
			0	17,080	42,700	42,700	102,480	42,700
Subtotal			92,825	491,940	780,180	899,080	2,264,025	540,250

TABLE A.2B - ESTIMATED REVENUES FROM (SI 1) INCREASING INDUSTRIAL CAPACITY

Initiative	Item	Notes	2017	2018	2019	2020	Subtotal		
							Start-up	2021 Ongoing	
2.1	Immigration Resource	LMIA, TFW, and PR fees	Need to process 30 applications per quarter	0	75,000	225,000	270,000	570,000	270,000
				0	75,000	225,000	270,000	570,000	270,000
2.2	Immigration Fast-track	N/A	N/A	0	0	0	0	0	0
				0	0	0	0	0	0
2.3	Sewing Curriculum	Licensing Fees	60 to 90 students at \$200	0	12,000	18,000	18,000	48,000	18,000
		Exam and certification fees	50 to 70 students at \$100	0	5,000	7,000	7,000	19,000	7,000
				0	17,000	25,000	25,000	170,800	25,000
2.4	Sewing Training	Tuition	Training program billed at \$7,000 to \$9,000 per trainee	0	280,000	420,000	490,000	1,540,000	525,000
				0	280,000	420,000	490,000	1,540,000	525,000
2.5	Pre-arrival Training Pilot	N/A	N/A	0	0	0	0	0	0
				0	0	0	0	0	-
2.6	Productivity Support	N/A	N/A	0	0	0	0	0	0
				0	0	0	0	0	0
Subtotal				0	372,000	670,000	785,000	1,827,000	820,000

TABLE A.3A – ESTIMATED EXPENDITURES FOR (SI 3) EXPANDING AWARENESS OF APPAREL OPPORTUNITIES

Initiative	Item	Notes	2017	2018	2019	2020	2021		
							Subtotal Start-up	Ongoing	
3.1	Industry Branding	Marketing Coordinator	Part-time marketing and public relations coordinator @ \$60,000 FTE + 22% MERCS/overhead (3 days per week contract)	0	43,920	43,920	43,920	131,760	43,920
		Website/Marketing	Development of website for associations, programs, services and platform for ongoing social media and other campaigns	0	40,000	10,000	10,000	60,000	10,000
		Video	Development of multi-media content for website and social media (10 videos per year at \$2,500 per). Does not include corporate videos.	0	25,000	25,000	15,000	65,000	15,000
		Brand Consultant	Third-party advisor and facilitator to help industry stakeholders define its brand advantage and market position	0	60,000	0	0	60,000	0
			-	168,920	78,920	68,920	316,760	68,920	
3.2	Teacher Toolkit	Project Manager (B)	50% 1-year full-time position @ \$70,000 FTE + 22% MERCS/overhead to lead SI 2.5, 3.2 & 3.4 SHARED WITH 2.5 and 3.4	0	42,700	0	0	42,700	0
		Project Operations	Travel for consultations, printing and publication	0	6,000	0	0	6,000	0
			0	48,700	-	-	48,700	-	
3.3	Career Showcase	Project Manager (C)	25% Full-time program position @ \$40,000 FTE + 22% MERCS/overhead SHARED WITH 1.2 (75%)	0	0	9,760	9,760	19,520	9,760
		Exhibition Space	Venue Hall	0	0	15,000	15,000	30,000	15,000
		Event Operations	Operations, equipment, temporary staff and catering	0	0	10,000	10,000	20,000	10,000
		Marketing	Advertising and promotions in media and publications	0	0	10,000	10,000	20,000	10,000
			0	0	44,760	44,760	89,520	44,760	
3.4	Apparel ACE-IT Pilot	Project Manager (B)	Full-time position @ \$70,000 FTE + 22% MERCS/overhead to lead SI 2.5, 3.2 & 3.4 SHARED WITH 2.5 and 3.2	0	0	17,080	42,700	59,780	0
		Equipment	Funding to donate equipment and materials to 4 schools - 2 Lower Mainland, 1 Vancouver Island and 1 Interior	0	0	0	240,000	240,000	0
		Marketing	Marketing of programs to youth via digital, social and print media	0	0	0	30,000	30,000	15,000
		Program Operations	Travel to liaise with government and school boards, hosting of meetings and production of printed materials	0	0	5,000	15,000	20,000	5,000
			0	0	22,080	365,000	349,780	20,000	
Subtotal			0	217,620	145,760	441,380	804,760	133,680	

TABLE A.3B – ESTIMATED REVENUES FROM (SI 3) EXPANDING AWARENESS OF APPAREL OPPORTUNITIES

Initiative	Item	Notes	2017	2018	2019	2020	Subtotal		2021
							Start-up	Ongoing	
3.1	Industry Branding	Website	Advertising revenue	0	5,000	10,000	15,000	30,000	25,000
		Video	Sponsorship and donations are captured in the employer and post-secondary contributions.	0	0	0	0	0	0
				0	5,000	10,000	15,000	30,000	25,000
3.2	Teacher Toolkit	N/A	N/A	0	0	0	0	0	0
				0	0	0	0	0	0
3.3	Career Showcase	Sponsorship and fees	Sponsorship, donations and fees from employers and post-secondary are included in their contribution lines. This item includes third-party sponsorship.	0	0	15,000	15,000	30,000	15,000
				0	0	15,000	15,000	30,000	15,000
3.4	Apparel ACE-IT	N/A	Sponsorship and donations are captured in the employer and post-secondary contributions.	0	0	0	0	0	0
				0	0	0	0	0	0
Subtotal				0	5,000	25,000	30,000	60,000	40,000

TABLE A.4A – ESTIMATED EXPENDITURES FOR (SI 4) STRENGTHENING POST-SECONDARY INSTITUTIONS’ ALIGNMENT WITH INDUSTRY

Initiative	Item	Notes	2017	2018	2019	2020	Subtotal	2021	
							Start-up	Ongoing	
4.1	Industry Summit(s)	Consultant (A)	Facilitator to host event and draft report/roadmap. Follow-up event would happen 2 years later	0	10,000	0	10,000	20,000	0
		Space	Meeting rooms and conference hall	0	10,000	0	10,000	20,000	0
		Summit Operations	Operations, equipment, temporary staff and catering. Majority can be in-kind	0	5,000	0	5,000	10,000	0
			0	25,000	0	25,000	50,000	0	
4.2	Educational Alignment	Executive Director	Executive Director @ \$90,000 FTE + 22% MERCS/overhead for representation of industry, coordination and senior project management. Lead all SI 1.0 through 5.0 but also acts as Project Manager for 1.1, 1.3, 2.2 and 4.2; in addition to consultations, facilitation and report drafting SHARED WITH 1.1, 1.3 and 2.2	0	10,980	10,980	10,980	32,940	10,980
			0	10,980	10,980	10,980	32,940	10,980	
4.3	Innovation Alignment	Consultant (A or B)	Facilitator to host event and draft report/roadmap	0	5,000	5,000	0	10,000	0
		Innovation Circle Operations	Operations, coordination, meeting space and catering. Majority can be in-kind	0	0	10,000	10,000	20,000	5,000
			0	5,000	15,000	10,000	30,000	5,000	
Subtotal			0	40,980	25,980	45,980	112,940	15,980	

TABLE A.4B – ESTIMATED REVENUES FROM (SI 4) STRENGTHENING POST-SECONDARY INSTITUTIONS’ ALIGNMENT WITH INDUSTRY

Initiative	Item	Notes	2017	2018	2019	2020	Subtotal	
							Start-up	2021 Ongoing
4.1	Industry Summit(s)	N/A Potential for sponsorship opportunities not included as events that summit could be associated with are currently owned and delivered by other organizations. Partnerships need to be established.	0	0	0	0	0	0
			0	0	0	0	0	0
4.2	Educational Alignment	N/A Sponsorship and donations are captured in the employer and post-secondary contributions. High probability costs will be offset by in-kind contributions.	0	0	0	0	0	0
			0	0	0	0	0	0
4.3	Innovation Alignment	N/A Sponsorship and donations are captured in the employer and post-secondary contributions. High probability costs will be offset by in-kind contributions.	0	0	0	0	0	0
			0	0	0	0	0	0
Subtotal			0	0	0	0	0	0

TABLE A.5A - ESTIMATED EXPENDITURES FOR (SI 5) ACCELERATING GROWTH OF APPAREL LEADERSHIP TALENT

Initiative	Item	Notes	2017	2018	2019	2020	Subtotal	2021	
							Start-up	Ongoing	
5.1	Apparel Incubator	Project Manager (D)	Full-time position @ \$70,000 FTE + 22% MERCS/overhead to lead 5.1 and 5.2 SHARED WITH 5.2 (50%) in future years	0	42,700	85,400	42,700	170,800	42,700
		Space	10,000 sq. ft. shared office (15), meeting and training space, utilities, etc.	0	65,000	250,000	250,000	565,000	250,000
		Administrative Officer (D)	Full-time clerk position @ \$40,000 FTE + 22% MERCS/overhead for incubator program and facility support	0	24,400	48,800	48,800	122,000	48,800
		Equipment	Funding for furniture and office equipment	0	10,000	40,000	5,000	55,000	5,000
		Fellowship advisors and mentors	Primarily in-kind	0	0	0	0	0	0
		Program operations	Operations, materials and supplies	0	7,500	20,000	24,000	51,500	24,000
			0	149,600	444,200	370,500	964,300	370,500	
5.2	Apparel Hub	Project Manager (D)	Full-time position @ \$70,000 FTE + 22% MERCS/overhead to lead 5.1 and 5.2 SHARED WITH 5.1 (50%) in future years	0	0	0	42,700	42,700	42,700
		Administrative Officer (E)	Full-time clerk position @ \$40,000 FTE + 22% MERCS/overhead for incremental hub program and facilities support	0	0	0	48,800	48,800	48,800
		Space	10,000 sq. ft. incremental shared design lab, production space, studio and showcase	0	0	0	250,000	250,000	250,000
		Equipment	Funding for furniture, sewing machines, cutting tables, studio lights, design computers, etc.	0	0	0	225,000	225,000	15,000
		Fellowship advisors and mentors	Primarily in-kind	0	0	0	0	0-	0
		Program Operations	Operations, materials and supplies	0	0	0	48,000	48,000	48,000
			0	0	0	614,500	614,500	404,500	
Subtotal			0	149,600	444,200	985,000	1,578,800	775,000	

TABLE A.5B - ESTIMATED REVENUES FROM (SI 5) ACCELERATING GROWTH OF APPAREL LEADERSHIP TALENT

Initiative	Item	Notes	2017	2018	2019	2020	Subtotal	2021
							Start-up	Ongoing
5.1	Apparel Incubator	Space rental fees	0	25,000	390,600	390,600	806,200	390,600
		Service Fees	0	5,000	35,000	35,000	75,000	35,000
			0	30,000	425,600	425,600	881,200	425,600
5.2	Apparel Hub	Space rental fees (Incremental)	0	0	0	291,400	291,400	291,400
		Service Fees (Incremental)	0	0	0	15,000	15,000	20,000
		Third Party Provider fees	0	0	0	168,000	168,000	168,000
		Showcase commissions	0	0	0	10,000	10,000	15,000
			0	0	0	484,400	484,400	494,400
Subtotal			0	30,000	288,800	910,000	1,365,600	920,000

TABLE A.6 -SUMMARY OF ESTIMATED EXPENDITURES AND REVENUES

Initiative	2017	2018	2019	2020	Subtotal Start-up	2021 Ongoing
SI 1 - ENSURING SUCCESS THROUGH SKILLS DEPLOYMENT AND CONNECTIONS						
EXPENDITURES	28,525	187,560	199,760	210,740	626,585	210,740
REVENUES	0	75,000	130,900	183,100	389,000	215,400
SUBTOTAL	(28,525)	(112,560)	(68,860)	(27,640)	(237,585)	4,660
SI 2 – INCREASING SKILLED LABOUR CAPACITY						
EXPENDITURES	92,825	491,940	780,180	899,080	2,264,025	540,250
REVENUES	0	372,000	670,000	785,000	1,827,000	820,000
SUBTOTAL	(92,825)	(119,940)	(110,180)	(114,080)	(437,025)	279,750
SI 3 - EXPANDING YOUTH AWARENESS OF APPAREL OPPORTUNITIES						
EXPENDITURES	0	217,620	145,760	441,380	804,760	133,680
REVENUES	0	5,000	25,000	30,000	60,000	40,000
SUBTOTAL	0	(212,620)	(120,760)	(411,380)	(744,060)	(93,680)
SI 4 - STRENGTHENING POST-SECONDARY INSTITUTIONS' ALIGNMENT WITH INDUSTRY						
EXPENDITURES	0	40,980	25,980	45,980	112,840	15,980
REVENUES	0	0	0	0	0	0
SUBTOTAL	0	(40,980)	(25,980)	(45,980)	(112,840)	(15,980)
SI 5 - ACCELERATING GROWTH OF APPAREL LEADERSHIP TALENT						
EXPENDITURES	0	149,600	444,200	985,000	1,578,800	775,000
REVENUES	0	30,000	425,600	910,000	1,365,600	920,000
SUBTOTAL	0	(119,600)	(18,600)	(79,500)	(213,200)	145,000
Total (to be found from non-revenue sources)	(121,350)	(605,700)	(344,380)	(678,580)	(1,744,710)	319,750

APPENDIX B: LOGIC MODEL ELEMENTS BY STRATEGIC INITIATIVE AND TACTICS

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STRATEGIC INITIATIVE #1 – ENSURING SUCCESS THROUGH SKILLS DEPLOYMENT AND CONNECTIONS

STRATEGIC OUTCOME

BC Apparel Industry workforce strategic initiatives are coordinated and continue to deliver value to industry beyond 2021 (end of SLMP life-cycle).

GOAL

To continue industry engagement, manage complementary labour programs and build connections with reinforcing initiatives.

TARGETS

A self-funding industry body, with sustainable revenue streams derived from in-demand workforce solutions, is in place by December 2020.

	INPUTS	ACTIVITIES (Tactics)	OUTPUTS	IMMEDIATE OUTCOMES	INTERMEDIATE OUTCOMES	LONG-TERM OUTCOMES
1.1 Association	<ul style="list-style-type: none"> ▪ Money ▪ Staff ▪ Partnerships ▪ Labour Market Information (LMI) ▪ Apparel Labour Market Strategy Stakeholders 	<ul style="list-style-type: none"> ▪ Industry, post-secondary and government provide seed capital to cover association's start-up costs and operating costs for first 24 months. ▪ Association becomes owner of the strategies identified in this document and is responsible for project management and delivery. ▪ Association develops a business plan that shows it can deliver on industry priorities and will have sufficient resources available to meet these objectives. ▪ Association develops a financial plan that shows it can generate sufficient revenue to become self-sustaining before December 2019 and is able to establish a strategic reserve. 	Apparel association established with seed funding, ownership of Apparel Labour Market Strategy, business plan and financial plan	Business and financial plans accepted and funded by stakeholders	Established an association to, in the first instance, address the BC Apparel Industry's workforce needs.	Industry efforts are coordinated and continue beyond SLMP life-cycle.
1.2 Workforce Programs	<ul style="list-style-type: none"> ▪ Money ▪ Staff ▪ Partnerships ▪ Labour Market Information (LMI) ▪ Apparel Labour Market Strategy Stakeholders 	<ul style="list-style-type: none"> ▪ In partnership with industry and post-secondary manage a common job bank to place interns, co-ops and graduates. ▪ Work with the provincial and federal governments on ensuring fast-track immigration pathways include access for the critical occupations identified by BC's Apparel Industry at all NOC skill levels A/O, B and C. 	<p>Establishment and implementation of job bank to place interns, co-ops and graduates</p> <p>Express entry program agreed by governments</p>	<p>Interns, co-ops and graduates find jobs in the Apparel Industry</p> <p>Express entry program established and underway</p>	Implemented additional programs to address workforce needs.	Stronger partnerships built with employers and Better job placement occurring for graduates and local job-seekers.
1.3 Branding Partnerships	<ul style="list-style-type: none"> ▪ Money ▪ Staff ▪ Partnerships ▪ Labour Market Information (LMI) ▪ Apparel Labour Market Strategy Stakeholders 	<ul style="list-style-type: none"> ▪ Have fashion and apparel included in the definition of cultural industries and identified as an important component of BC's value added exports. Also seek to integrate apparel with tourism and education marketing efforts to support building of Vancouver's global brand. ▪ Leverage cultural, trade, education and tourism events to promote the Apparel Industry and its career potential to international audiences. 	<p>Fashion and Apparel industries marketed and function as cultural industry and value-added exports</p> <p>Apparel industry and its career potential promoted at events and international audiences</p>	Increased awareness of BC Fashion and Apparel industries lead to increased sales and exports	Identified other complementary resources and initiatives to support apparel workforce needs and job growth.	Common global branding activities leverage each other to create cross-linkages between apparel, education and tourism.

STRATEGIC INITIATIVE #2 – INCREASING SKILLED LABOUR CAPACITY

STRATEGIC OUTCOME

BC Apparel Industry’s short-term and medium-term vacancies of critical occupations are filled with skilled workers and productivity increases are realized.

GOAL

To increase domestic industrial capacity by engaging more design, product development and manufacturing talent.

TARGETS

Between 2018 and 2025, annually introduce to BC’s labour force:

- 1) 125 other apparel professionals and technical roles (1,000 workers over 8 years).
- 2) 250 new industrial sewers (2,000 sewers over 8 years).

	INPUTS	ACTIVITIES (Tactics)	OUTPUTS	IMMEDIATE OUTCOMES	INTERMEDIATE OUTCOMES	LONG-TERM OUTCOMES
2.1 Immigration Resource	<ul style="list-style-type: none"> ▪ Money ▪ Staff ▪ Partnerships ▪ Labour Market Information (LMI) ▪ Apparel Labour Market Strategy Stakeholders 	<ul style="list-style-type: none"> ▪ Industry body hires dedicated immigration consultants to develop expertise in the BC Apparel Industry so they can act as a shared resource for firms who do not have their own internal capacity or Human Resources department. ▪ Establish a program with elements similar to the BC Construction Association’s industry-funded Foreign Skilled Worker program. ▪ BC Apparel Association to be an approved referral partner for the Global Skills Strategy talent streams. 	Companies, especially SMEs, able to recruit global talent faster.	Created resource to support immigration needs of SMEs.	Increases in numbers of Foreign Skilled Workers.	Shortages of apparel skilled workers, mid-level professionals and executives addressed.
2.2 Immigration Fast-Track Pilot	<ul style="list-style-type: none"> ▪ Money ▪ Staff ▪ Partnerships ▪ Labour Market Information (LMI) ▪ Apparel Labour Market Strategy Stakeholders 	<ul style="list-style-type: none"> ▪ Define a list of key occupations (see Appendix C) that could be included in a Fast-Track immigration stream for apparel and identify which current immigration programs already can be used, then where gaps exist. ▪ Establish a Provincial Nominee Program category for Apparel under the Entry Level and Semi-Skilled pathway for Permanent Residency. ▪ Seek LMIA exemptions for Entry-Level and Semi-Skilled, and Highly-Skilled pathways for select group of critical occupations that require Temporary Foreign Workers. ▪ Utilizing the competency standard from 2.3, evaluate foreign trained Industrial Sewers for Permanent Residency issuing bonus points if they can demonstrate requisite skill level. 	Companies, especially SMEs, able to recruit global talent faster.	Implemented a provincial immigration Fast-Track pilot program to fill critical vacancies.	Provincial immigration Fast-Track program tested and rolled out	Shortages of apparel skilled workers, mid-level professionals and executives addressed.
2.3 Industry Certification	<ul style="list-style-type: none"> ▪ Money ▪ Staff ▪ Partnerships 	<ul style="list-style-type: none"> ▪ Establish an industry governing body to act as the advisory board for the definition of a standard and the referees in awarding of certifications. 	Certification standards established with	Defined competency framework and industry managed	Certification standard adopted by apparel employers	Increased skills and competency among employed

	<ul style="list-style-type: none"> Labour Market Information (LMI) Apparel Labour Market Strategy Stakeholders 	<ul style="list-style-type: none"> As a pilot, develop a common core Industrial Sewing Curriculum with two initial levels - Foundation and Level A Sewer. Define and publish the process for certification, including development of written and practical exams and standards for third-party examiners. Expand to other technical occupational roles. 	curriculum, exams and standards.	certification for Industrial Sewers, Pattern Makers, Quality Professionals and Sourcers.		technical professionals, leading to greater productivity.
2.4 Industry Training	<ul style="list-style-type: none"> Money Staff Partnerships Labour Market Information (LMI) Apparel Labour Market Strategy Stakeholders 	<ul style="list-style-type: none"> Establish in the Lower Mainland, a cooperative industry run Industrial Sewing Training Centre, potentially leveraging excess factory capacity. Share/License curriculum from 2.3 with suitable BC training institutions so they can create sewing centres in other areas of the province. 	Trained sewers and other technical professionals graduate from training programs.	Increased number of seats for training of sewers and other technical positions.	Increased numbers of technical professionals employed in Apparel Industry	Industrial capacity increased from availability of more sewers and other technical professionals.
2.5 Pre-Arrival Training Pilot	<ul style="list-style-type: none"> Money Staff Partnerships Labour Market Information (LMI) Apparel Labour Market Strategy Stakeholders 	<ul style="list-style-type: none"> Work with federal and provincial governments to define a suitable framework for pre-arrival training in source countries to increase size of candidate pool and provide short-term solution to large number of vacancies. Share/License BC curriculum from 2.3 with suitable foreign training institutions so they can train sewers in-country leveraging the Dogwood Diploma model. Establish an employer consortia to perform functions similar to Health Match BC for the technical and trades positions needed by the BC Apparel Industry. 	<ul style="list-style-type: none"> Framework for pre-arrival training pilot in source countries agreed Curriculum implemented 	Implemented an immigration pre-arrival pilot program to help industry collectively fill critical vacancies.	Skilled and trained immigrants available to fill critical vacancies	Critical vacancies filled with skilled and trained immigrants.
2.6 Productivity Support	<ul style="list-style-type: none"> Money Staff Partnerships Labour Market Information (LMI) Apparel Labour Market Strategy Stakeholders Apparel Labour Market Strategy Stakeholders 	<ul style="list-style-type: none"> Leverage Canada BC Jobs Grants to train technical and trades workers critical to the Apparel Industry through a fixed funding envelope dedicated to provincial priority manufacturing industries. Design and introduce a jointly funded (matched funding) business advisory program to help apparel enterprises work with technical consultants to improve manufacturing productivity. In cooperation with various government and financial agencies, design and introduce a grant and loan program to encourage investments in innovation - capital equipment and new technologies. 	<ul style="list-style-type: none"> Technical and trades workers trained Business advisory program supports manufacturing productivity consultants New investments in innovation, capital equipment and technology 	Increased industrial productivity of BC apparel manufacturers.	Cost competitiveness of BC Apparel Industry improves from greater productivity	Higher efficiency and lower cost apparel production occurring to reduce labour shortage risk.

STRATEGIC INITIATIVE #3 – EXPANDING YOUTH AWARENESS OF APPAREL OPPORTUNITIES

STRATEGIC OUTCOME

A greater number of youth and under-represented groups choose to enter BC’s apparel workforce.

GOAL

To increase the awareness of the BC Apparel Industry and the diverse and dynamic career opportunities within.

TARGETS

By December 2019, via youth surveys, to show a 200% increase in "Favourable Consideration of Careers in the Apparel Industry" over those identified in the Sector LMP Phase 2 report.

By December 2020, via post-secondary institutions data and job vacancy rates, show a 20% increase in new student registrations and a job vacancy rate decline of 10% over those figures identified in the Sector LMP Phase 2 report.

	INPUTS	ACTIVITIES (Tactics)	OUTPUTS	IMMEDIATE OUTCOMES	INTERMEDIATE OUTCOMES	LONG-TERM OUTCOMES
3.1 Industry Brand	<ul style="list-style-type: none"> ▪ Money ▪ Staff ▪ Partnerships ▪ Labour Market Information (LMI) ▪ Apparel Labour Market Strategy Stakeholders 	<ul style="list-style-type: none"> ▪ Work with Apparel Industry corporate marketing departments to establish a collective industry story that provides a framework around vision, purpose and key messages. ▪ Build website that not only evokes shared values but profiles the industry and its strengths; showcases the constituent companies; highlights the career diversity; and introduces the stories of key influencers. In addition, the site will illustrate career maps and skills profiles for key positions. It will profile the different education programs available to gain those skills and provide a job- bank and wage data. ▪ Create a library of dynamic and exciting multi- media content that can be used to engage youth, parents, educators and employment agencies. ▪ Launch a targeted social media/broader marketing campaign to promote the industry and career potential to job-seekers. 	Implement a communications strategy for industry skills attraction with media platforms	Create awareness of apparel brand for skills and capability	Built a collective brand for BC's Apparel Industry.	Students, job-seekers, policy decision makers and the general public have an informed and positive view of BC's Apparel Industry and its economic impact and employment potential.
3.2 Teachers' Toolkit	<ul style="list-style-type: none"> ▪ Money ▪ Staff ▪ Partnerships ▪ Labour Market 	<ul style="list-style-type: none"> ▪ Work with THESA to define list of needed tools to enhance understanding and encourage students to pursue apparel related career. This 	Created a toolkit to support educators at BC schools.	Skills toolkit provided to educators and used	Skills toolkit used by students leading to	Students and have a more positive view of career options in BC's

	<p>Information (LMI)</p> <ul style="list-style-type: none"> ▪ Apparel Labour Market Strategy Stakeholders 	<p>could include:</p> <ul style="list-style-type: none"> ○ Apparel industry presentations; ○ Speakers/Mentors; ○ Industry sponsored projects; and ○ Industry tours. <ul style="list-style-type: none"> ▪ Work with government, industry, post-secondary and THESA to implement a program which raises funds to rebuild and refit home economic classes in BC schools with Apparel Industry related equipment and materials (like the BC Construction Foundation's Project ShopClass). ▪ Work with industry, Skills Canada and other apparel associations to implement a more inclusive and exciting skills competition. 			increased interest in Apparel Industry	Apparel Industry and enter home economics programs at secondary schools.
3.3 Career Showcase	<ul style="list-style-type: none"> ▪ Money ▪ Staff ▪ Partnerships ▪ Labour Market Information (LMI) ▪ Apparel Labour Market Strategy Stakeholders 	<ul style="list-style-type: none"> ▪ Post-secondary, THESA, Industry Training Authority and industry stakeholders to design annual career showcase to promote industry jobs to youth. 	Annual event delivered	Event format and program designed and agreed to by partners	Create awareness of diversity of exciting careers in BC Apparel Industry and the training and experience pathways to obtain those jobs	Students and job-seekers have a more positive view of career options in BC's Apparel Industry. More students pursue careers in BC's Apparel Industry.
3.4 High School YITT/YITW	<ul style="list-style-type: none"> ▪ Money ▪ Staff ▪ Partnerships ▪ Labour Market Information (LMI) ▪ Apparel Labour Market Strategy Stakeholders 	<ul style="list-style-type: none"> ▪ Work with Ministry of Education, post-secondary, THESA, Industry Training Authority and industry to identify suitable framework to establish a Youth Training/Working in Apparel pilot at a secondary school in the Lower Mainland; replicating the successful ACE-IT model. 	Adoption of framework for Youth Training/Working in Apparel pilot	Youth Training/Working in Apparel pilot initiated	Implemented an industry supported education and employment program at BC schools.	More high-school students pursue apprenticeship-like pathways to careers in BC's Apparel Industry.

STRATEGIC INITIATIVE #4 – STRENGTHENING POST-SECONDARY INSTITUTIONS' ALIGNMENT WITH INDUSTRY

STRATEGIC OUTCOME

The province's post-secondary programs are well-aligned with BC Apparel Industry's skills (training) and innovation (research) needs.

GOAL

To increase dialogue and strengthen relationships between post-secondary institutions and industry.

TARGET

By June 2019, via industry survey, to show a 50% improvement in CEO satisfaction scores over those identified in the Sector LMP Phase 2 report.

	INPUTS	ACTIVITIES (Tactics)	OUTPUTS	IMMEDIATE OUTCOMES	INTERMEDIATE OUTCOMES	LONG-TERM OUTCOMES
4.1 Improved Post-Secondary Understanding	<ul style="list-style-type: none"> ▪ Money ▪ Staff ▪ Partnerships ▪ Labour Market Information (LMI) ▪ Apparel Labour Market Strategy Stakeholders 	<ul style="list-style-type: none"> ▪ Establish roundtable with post-secondary Deans and industry CEO's to identify and discuss the CEO's visions for growth. ▪ Host a Summit where industry leaders can discuss with post-secondary practitioners more specific skills and innovation needs. 	Prepare an Apparel Industry Skills and Innovation Roadmap (2018) to guide institutional programs. Update annually.	Improved post-secondary understanding of BC apparel skills and innovation needs.	New programs targeted at BC apparel skills and innovation at BC post-secondary institutions.	Increased collaboration between post-secondary and BC Apparel Industry.
4.2 Program Alignment	<ul style="list-style-type: none"> ▪ Money ▪ Staff ▪ Partnerships ▪ Labour Market Information (LMI) ▪ Apparel Labour Market Strategy Stakeholders 	<ul style="list-style-type: none"> ▪ Establish anew the program advisory committees at each post-secondary institution and seek CEO signoff on their corporate representatives' participation. ▪ Review existing programs in greater detail against the 2018 Apparel Skills and Innovation Roadmap. ▪ Identify and further explore strengths of the international post-secondary programs preferred by CEO's. ▪ Produce a report to identify specified education initiatives to be replicated in BC. 	Reinforce post-secondary specializations, as appropriate.	Better aligned post-secondary educational programs (design, engineering and science) with industry needs.	Programs at BC post-secondary institutions targeted at meeting BC apparel's current and emerging skills needs.	Increase in BC graduates finding higher-value employment in BC Apparel Industry.
4.3 Innovation Alignment	<ul style="list-style-type: none"> ▪ Money ▪ Staff ▪ Partnerships ▪ Labour Market Information (LMI) ▪ Apparel Labour Market Strategy Stakeholders 	<ul style="list-style-type: none"> ▪ Establish top 10 priorities for research and development (design, engineering, materials, production and software/digital). 	Establish collaborative post-secondary and industry Innovation Circle for each priority.	Better aligned post-secondary research and development with industry challenges.	Research and development leads to innovation for Apparel Industry.	Enhanced product, material and technology development partnerships and new business formation.

STRATEGIC INITIATIVE #5 – ACCELERATING GROWTH OF APPAREL LEADERSHIP TALENT

STRATEGIC OUTCOME

BC Apparel Industry gains increased number of business-savvy leaders to contribute to the growth of the sector.

GOAL

To develop and strengthen the next generation of apparel leadership in British Columbia and support growth of apparel companies.

TARGET

By September 2020, establish a centre of excellence that provides tools and programs to grow apparel leadership and innovation.

	INPUTS	ACTIVITIES (Tactics)	OUTPUTS	IMMEDIATE OUTCOMES	INTERMEDIATE OUTCOMES	LONG-TERM OUTCOMES
5.1 Leadership Growth	<ul style="list-style-type: none"> ▪ Money ▪ Staff ▪ Partnerships ▪ Labour Market Information (LMI) ▪ Apparel Labour Market Strategy Stakeholders 	<ul style="list-style-type: none"> ▪ Establish an incubator to encourage entrepreneurial and management skills. ▪ Enact an Apparel Fellowship program in partnership with industry and post-secondary to help leaders develop skills in business management and innovation. 	<p>Incubator underway</p> <p>Apparel Fellowship program underway</p>	<p>Graduates from incubator for entrepreneurship and management obtain positions in Apparel Industry</p>	<p>Increased number of top apparel design and manufacturing leaders in BC.</p>	<p>Industry gains new cadre of local leadership talent.</p>
5.2 Business Growth	<ul style="list-style-type: none"> ▪ Money ▪ Staff ▪ Partnerships ▪ Labour Market Information (LMI) ▪ Apparel Labour Market Strategy Stakeholders 	<ul style="list-style-type: none"> ▪ Implement an apparel district centre of excellence/hub (large physical space) to provide small and medium sized companies with cost- effective training and production space within Metro Vancouver. ▪ Leverage the concentration of apparel companies to initiate shared training, production and innovation spaces to reduce the capital investment burden faced by SMEs. 	<p>Apparel district centre of excellence established and operational</p> <p>Shared training, production and innovation facility established</p>	<p>Apparel companies participate in centre of excellence and in training facility</p>	<p>Sustained growth of apparel companies leading to increased jobs.</p>	<p>Industry gains new cadre of local leadership talent. Industry gains new firms leading to further job growth.</p>

APPENDIX C: COMMON JOB TYPES IN HEAVY DEMAND BY BC APPAREL INDUSTRY EMPLOYERS (BY NOC) FOR INCLUSION IN IMMIGRATION FAST-TRACK

Level	Skill Type	Major Group	NOC	NOC Job Title	Common Job Titles
0/A	0 – Management Occupations	Senior Management	0015	Senior Managers – trade, broadcasting and other services	Chief Executive Officer, Chief Financial Officer
0/A			0016	Senior Managers – construction, transportation, production and utilities	Vice President – Creative, Vice President – Sourcing, Creative Director
0/A		Specialized Middle Management	0113	Purchasing managers	Senior Director – Manufacturing, Director - Fabric Development, Director – Fabric Sourcing, Senior Manager, Fabric Management
0/A			0114	Other administrative services managers	Manager - Operations
0/A			0124	Advertising, marketing and public relations managers	Director – Public Relations, Director – Communications, Manager – e-Commerce, Manager – Web Marketing
0/A		Middle management occupations in trades, transportation, production and utilities	0911	Manufacturing managers	Director – Production, Director – Technical Development, Category Manager, Production Manager
A	1 – Business, finance and administration occupations	Professional occupations in business and finance	1122	Professional occupations in business management consulting	Analyst
B		Finance, insurance and related business administrative occupations	1315	Customs, ship and other brokers	Shipper, Customs Broker
B	2 – Natural and applied sciences and related occupations	Professional occupations in natural and applied sciences	2174	Computer programmers and interactive media developers	e-Commerce developer
B		Technical occupations related to natural and applied sciences	2233	Industrial engineering and manufacturing technologists and technicians	Industrial Design Engineer, Industrial Design Technologist
B			2252	Industrial designers	Industrial Designer
B	5 – Occupations in art, culture, recreation and sport	Technical occupations in art, culture, recreation and sport	5232	Other performers, n.e.c.	Fashion Model
B			5241	Graphic designers and illustrators	Technical Development Specialist, Art Director, Art Director - Marketing
B			5243	Theatre, fashion, exhibit and creative designers	Technical Designers
B			5245	Patternmakers – textile, leather and fur products	Technical Developer, Print & Pattern Designers
B	6 – Sales and service occupations	Technical sales specialists in wholesale trade and retail and wholesale buyers	6222	Retail and wholesale buyers (former 6233)	Merchandiser, Buyer
B		Service supervisors and specialized service occupations	6343	Shoe repairers and shoemakers	Bootmaker, Shoemaker
B	7 - Trades, transport and equipment operators and related occupations	Industrial, electrical and construction trades	7231	Machinists and machining and tooling inspectors	CNC Machinist, Machinist, Model Maker
B			7232	Tool and die makers	Mould Maker, Tool Maker
B	9 Occupations in manufacturing and utilities	Processing, manufacturing and utilities supervisors and central control operators	9217	Supervisors, textile, fabric, fur and leather products processing and manufacturing	Assembly Supervisor, Cutting Supervisor, Quality Control Supervisor, Sewing Supervisor
C		Processing and manufacturing machine operators and related production workers	9446	Industrial sewing machine operators	Industrial Sewer
D			9619	Other labourers in processing, manufacturing and utilities	Assembler, Cutter, Former, Labourer, Packer, Shaper, Trimmer

APPENDIX D: BC APPAREL LMP STEERING COMMITTEE

#	Name	Organization	Title	April 24, 2017	July 24, 2017	August 23, 2017	September 1, 2017
				Mon, 10am-12pm	Mon, 11am-12pm	Wed, 1pm-2pm	Fri, 1pm-2pm
1	Laura Appleton	Arc'teryx	Manager, Talent Acquisition	---	P	P	P
2	Virginia Beltjens	White House Designs	VP, Operations	---	---	---	---
3	Amy Frankel	Aritzia	Co-General Counsel	U	U	P	N
4	Eric Kazenbroot	Peak Apanel	Owner	P	P	P	U
5	Laura Jaeger	Lululemon	Manager, Global Mobility	---	---	P	P
6	Alex McAulay	Kosan	Founder	P	P	P	U
7	Sarah Murray	VCC/ Fashion Week	Program Coordinator	P	P	P	P
8	Jeff Penner	Minimoc	Co-founder	P	---	---	P
9	Julie Robb	MEC	Director, Recruitment	P	P	U	U
10	Carolyn Robertson	KPU	Dean	P	P	P	P
11	Tracy Ryder-Glass	UFV	Dean	U	---	N	N
12	Cindy Steward	UFV	Designate for Tracy	---	---	P	P
13	Alan Yiu	Westcomb Outwear	Creative Director	---	---	P	P

Legend:

- P** Participated
- N** Indicated would attend but did not
- U** Responded to invite and indicated unable to attend
- N/A** On the date of the meeting the individual was not part of this group.
- Blank** No response to invite

Working Group 1 - Training and Certifications for a Competitive Industry

#	Name	Organization	Title	March 9, 2017	April 18, 2017	June 15, 2017
				Thu, 10am-12pm	Tue, 1pm-2pm	Thu, 10am-12pm
1	Mary Boni	Lasalle College	Director	P	---	P
2	Shirley Calla	KPU	Faculty Member	P	P	P
3	Kathy Bolton	White House Design	Senior Designer	P	---	P
4	Hélène Day Fraser	Emily Carr	Associate Professor, Faculty of Design and Dynamic Media	U	P	U
5	Tara Findlay	Arc'teryx	Manager, Fit and Pattern Engineering	P	P	P
6	Andrea Korens	Vancouver Community College	Program Coordinator Fashion	---	P	P
7	Janice Larsen	Beehive	Technical Consultant	P	---	P
8	Sara Nathanson	Aritzia	HR Director	U	U	U
9	Carolyn Robertson	KPU	Dean, Wilson School of Design	P	P	U
10	Jerome Rodriguez	Manager, Industry Relations	Industry Training Authority BC	---	N/A	N/A
11	Toby Russell	MEC	Product Development Manager	U	P	P
12	Tracy Ryder-Glass	UFV	Dean, Faculty of Professional Studies	P	U	---
Ex-officio						
A	Shauna Collister	Government of BC	Program Manager, Sector and Project Based Programs	P	U	N/A
B	Yavhel Velazquez	Government of BC	Program Manager, Sector and Project Based Programs	N/A	N/A	P

Working Group 2 - Resolving Industrial Sewing Capacity

#	Name	Organization	Title	March 7, 2017	April 12, 2017	June 13, 2017
				Tue, 1pm-3pm	Tue, 1pm-3pm	Tue, 10am-12pm
1	Chloe Angus	Chloe Angus Design	Owner/Designer	P	U	---
2	Melanie Conn	Threadworks	Program Manager	---	---	P
3	Keith Cotman	Arc'teryx	Factory Manager	P	P	P
4	Asadeh Hessami	Threadworks	Program Manager	---	---	P
5	Ying Ying Hu	Syte Industries	Vice-President	N/A	N/A	---
6	Eric Kazenbroot	Peak Apparel	Owner	P	P	P
7	Bal Lallu	Advantage Labels	Owner	---	P	P
8	Irene Li	White House Design	VP Product Development	P	P	---
9	Patty Nayel	Pure Magnolia Gowns	Creator	P	P	P
10	Jeff Penner	Minimoc	Owner	P	---	---
11	Vladimir Rincon	Vertical Suits	Owner	P	P	---
12	Lexi Soukoreff	Daub + Design	Owner/Designer	---	P	P
13	Tony Tam	Arc'teryx	People and Culture Partner	P	U	P
14	Alan Yiu	Westcomb Outwear	Owner	P	U	P
Ex-officio						
A	Paula Kruyer	BC Alliance for Manufacturing	Instructor, ISTP	N/A	P	P
B	Shauna Collister	Government of BC	Program Manager, Sector and Project Based Programs	---	P	N/A
C	Yavhel Velazquez	Government of BC	Program Manager, Sector and Project Based Programs	N/A	N/A	U

Working Group 3 - Role of Immigration in Specialized Skills

#	Name	Organization	Title	March 10, 2017	April 20, 2017	June 20, 2017
				<i>Fri, 1pm-3pm</i>	<i>Thu, 1pm-3pm</i>	<i>Tue, 10am-12pm</i>
1	Laura Appleton	Arc'teryx	Talent Acquisition & Development Manager	P	U	P
2	Virginia Beltjens	White House Design Company	Corporate Sales Manager	---	P	---
3	Amy Frankel	Aritzia	Co-General Counsel	P	U	---
4	Laura Jaeger	Lululemon	Global Mobility Manager	P	P	---
5	Eric Kazenbroot	Peak Apparel	Owner	P	P	P
6	Julie Robb	MEC	Director, HR	---	---	P
7	Jason Viberg	Viberg Boots	Manager of Quality Control	P	P	---
8	Stephen Wilson	Syte Industries	Director, Business Development	N/A	N/A	P
Ex-officio						
A	Shauna Collister	Government of BC	Program Manager, Sector and Project Based Programs	---	P	N/A
B	Yavhel Velazquez	Government of BC	Program Manager, Sector and Project Based Programs	N/A	N/A	---

Working Group 4 - Image, Youth Engagement and Diversity

#	Name	Organization	Title	March 10, 2017	April 13, 2017	June 16, 2017
				<i>Fri, 10am-12pm</i>	<i>Thu, 10am-12pm</i>	<i>Fri, 1pm-3pm</i>
1	Laura Appleton	Arc'teryx	Talent Acquisition & Development Manager	P	U	P
2	Gaby Bayona	Truvelle	Owner	P	U	---
3	Natasha Campbell	Visual College of Art & Design	Head, Community Engagement	P	P	---
4	Keith Doyle	Emily Carr University	Faculty	P	P	---
5	Andhra Goundrey	KPU	Coordinator, Fashion Design	---	P	N
6	Justine Higgs	Lasalle College	Admissions Representative	P	P	P
7	Susan Jennings	Burnaby School District	Teacher	U	P	---
8	Dawn Kelly	Vancouver School District	Teacher	---	---	---
9	Corrine Kepper	Aritzia	Director, Public Relations	---	---	---
10	Alex McAulay	Kosan	Founder	P	P	P
11	Brad McCann	Platform Product Solutions	President	---	P	N
12	Sarah Murray	VCC/Fashion Week	Program Coordinator	P	P	N
13	Michael Pope	KPU	Instructor	P	U	P
14	Katherine Soucie	Soucie Design	Owner	P	P	N
15	Vivienne Taylor	Fashion High	Owner	P	P	P
Ex-officio						
A	Shauna Collister	Government of BC	Program Manager, Sector and Project Based Programs	---	P	N/A
B	Yavhel Velazquez	Government of BC	Program Manager, Sector and Project Based Programs	N/A	N/A	P



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