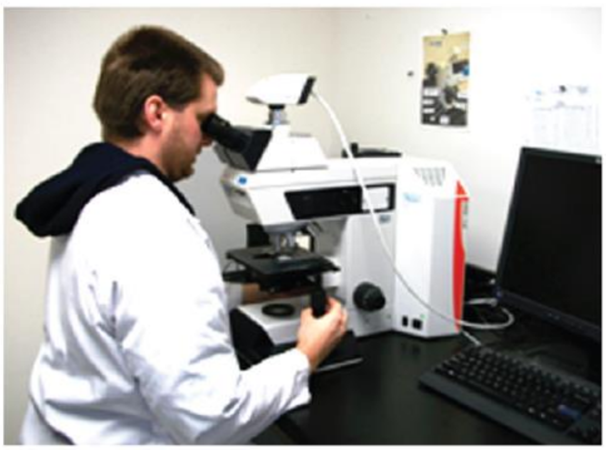
Clarington Industrial/Construction
Business Retention and Expansion Report
March 2018



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Introduction

Clarington is growing at an unprecedented rate. Understanding the current business climate is essential to ensuring existing and future business is well positioned to take advantage of the many opportunities rising in Clarington. The Municipality of Clarington's own strategic plan clearly identifies job creation and economic development as its number one priority for this term of Council.

With four of Canada's top 100 infrastructure projects underway today in Clarington it is key to have a clear understanding of the existing business base, skills and services. These projects are bringing thousands of jobs to Clarington.

The Clarington Board of Trade (CBOT) and the Office of Economic Development have existing relationships and respect within the business community. These trusted relationships have allowed for the deployment of a team of volunteers and to attract a diverse cross section of business to participate in the business retention and expansion interviews.

This project utilized all staff at CBOT plus the Board of Directors and many volunteers.

CBOT Team

Name	
Sheila Hall	Executive Director
Bonnie Wrightman	Manager of Business Development
Adam Jeronimo	Business Development Lead
Tanya Albis	Membership and Program Lead
Jessica Sommerville	Marketing and Research Lead
Supported by	
Carolyn Puterbourgh	Ontario Ministry of Agriculture Food and Rural Affairs
Robert Humphrey	Ontario Ministry of Agriculture Food and Rural Affairs
Ryan Narpes	Ontario Ministry of Agriculture Food and Rural Affairs
Stephen Morris	Ontario Ministry of Agriculture Food and Rural Affairs

Leadership Committee:

Name	Company	Area
Peter Hobb	Collins Barrow	Courtice
Kevin Ferguson	Canada Rubber	Bowmanville
Paige Marlow	Durham Workforce Authority	Durham
Randy Farmer	Ranfar Steel	Courtice

Volunteers

Name	Company	Area
Paige Marlow	Durham Workforce Authority	Durham
Peter Hobb	Collins Barrow	Courtice
Kevin Ferguson	Canada Rubber	Bowmanville

Executive Summary

The Clarington Board of Trade and Office of Economic Development (CBOT) has delivered the role of Economic Development for the Municipality of Clarington for the past 19 years. CBOT proudly represents all business within the borders of the Municipality of Clarington. CBOT is governed by a Board of Directors consisting of 18 business leaders from all areas of the Municipality with a diversity in sector, size and skills to provide a fair representation of the business community.

To ensure Clarington's economic development objective are aligned with industry best practices CBOT determined that annual sector focused BR+E projects would be the best course of action, allowing for a deeper understanding of industry needs. In 2016, CBOT completed the BR+E survey project with Clarington Main Street business. In 2017, CBOT continued this programming with a BR+E project focused on our industrial and construction business.

The Clarington Business Retention and Expansion Industrial/Construction Study has provided insight into these sectors focused on six modules including:

- **Business Climate:** sharing information on demographics of individual business
- **Business Development:** sharing information on how individual business are doing and support needs for growth
- **Workforce:** identifying current and predicted workforce requirements
- **Future Plans:** discussing future growth/expansion plans
- **Community Development:** discussions on the physical and functional aspects of the community
- **Industrial/Construction:** increase direct discussion on these sectors.

CBOT was able to compile a comprehensive list of businesses in manufacturing, industrial, distribution, life science and construction within the Clarington boundaries. The sample size for this study was 24% which according to OMAFRA is a quality sample size that fairly represents the community.

The Clarington BR+E project demonstrates the commitment to reinforcing and strengthening the local business community as it continues to grow. The survey results collected serve to reflect Clarington as a desirable place to do business and highlight areas where additional support from CBOT will have a positive impact". In addition, we can compare data between the industrial/construction survey and the 2016 Mainstreet survey to identify trends and programming both common and unique.

Community Overview

As the eastern gateway to the GTA, the Municipality of Clarington continues to experience rapid growth. Clarington hosts a variety of lifestyle options stemming from rural to urban in nature. It is divided into 4 core centers: Courtice, Bowmanville, Newcastle and Orono, in addition there are over a dozen smaller hamlets that contribute to the Clarington landscape, lifestyle and economy.

Clarington's 2016 recorded census population is 92,013 providing an available workforce of 51,440. According to Emsi's Q3 2017 Data Set there are close to 4,500 jobs in industrial, construction and life science sectors in Clarington, representing approximately 19% of Clarington jobs.

Clarington is located in close proximity to the city centre of Toronto to the west, Kawartha Lakes to the north and Northumberland to the East. Ongoing projects such as the Highway 407 extension represent a probable growth and therefore have the potential to further support the economic development of Clarington as a whole.

Figure 1 is representative of the varied businesses within the Municipality of Clarington as well as some relevant numbers, such as regional employees.

Figure 1: Labour Flows (based upon 2011 NHS data)

Description	Employed in Clarington Region	Resident in Region	Net Import
Utilities	3,055	2,165	890
Retail trade	2,470	5,105	-2,635
Health care and social assistance	2,125	5,110	-2,985
Accommodation and food services	1,555	2,090	-535
Educational services	1,530	3,225	-1,695
Manufacturing	**1,265**	**5,030**	**-3,765**
Professional, scientific and technical services	**1,035**	**2,310**	**-1,275**
Construction	**1,000**	**3,165**	**-2,165**
Public administration	795	3,150	-2,355
Other services (except public administration)	755	1,765	-1,010

Clarington BR+E Businesses

The Clarington BR+E project was well received in the local business community with 21 businesses participating in the survey out of the 87 businesses to whom the invitation was extended, representing a roughly 24% participation rate. These businesses embody a cross section of the local construction and industrial business community by size, location, and industry.

Profile of participants

The majority of participants are manufacturing in nature, while there is a strong representation of construction and life science companies as well. Of the 21 businesses surveyed, 62% are locally owned and operated with one location, 19% are locally owned with more than one location, and 19% are branch or division of a regional, national, or international company (Figure 2). Of these businesses the majority are well established, with 52% having been owned and operated in Clarington for between 26 years or more, followed by 34% within the range of 11 to 25 years, and 14% for 4 to 10 years (Figure 3). The breakdown of company size by number of employee notes 28% employ 1-19, 43% employ 20-49, 24% employ 50-99 and 5% employ 100 – 299 (Figure 4). 94% of owners are involved in the day to day operations of their businesses. 71% of these businesses have business plans, with 85% of those having been updated within the past 3 years. Primary markets are identified as 48% local and regional, 38% international and 14% national, whild 52% are serving/impacting business outside the community.

Figure 2: Ownership

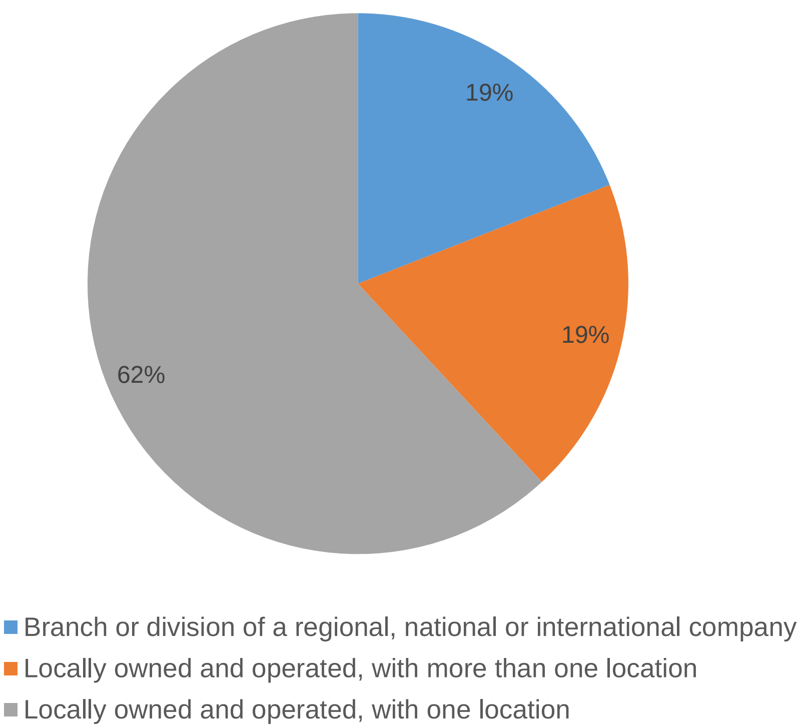


Figure 3: Years in Business

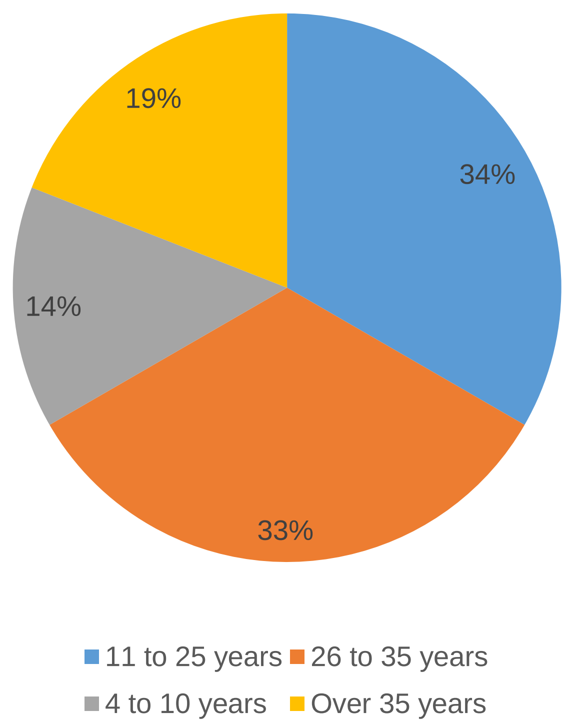
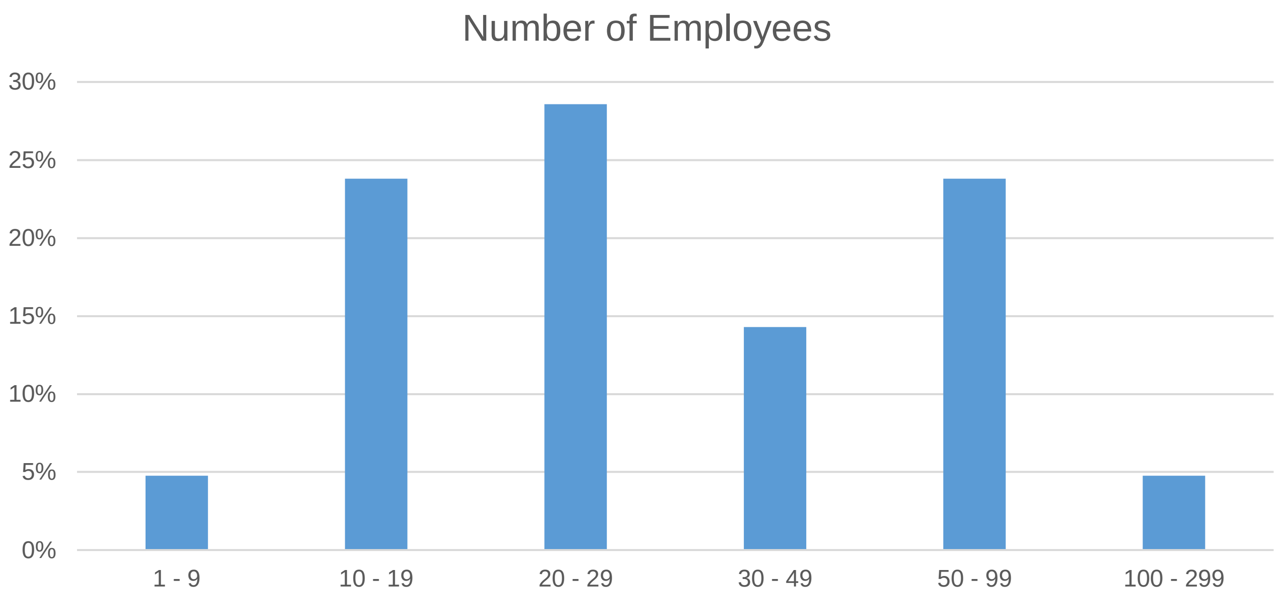


Figure 4: Number of employees



Conclusion

There are many factors that impact business to make a decision on relocation, expansion, growth and decline. Having a strong community that can meet their many needs is critical to their success.

From these statistics, it is clear that Clarington business in these sectors are primarily locally owned, small to medium sized business that are well rooted and committed to the community and their workforce.

Proposed Actions:

1. Provide programming and education geared to small and medium sized companies
    a. Business Counselling
    b. Business Resource
    c. Encourage collaboration and buying local to support Clarington business
2. Continue robust Corporate Call Program to ensure open communication and programming driven by the business community and their identified needs.

Business Climate

Business climate refers to the conditions within a community that have the potential to effect local business operations and overall success of these businesses. This can include services and local facilities as well as conditions of the community.

As a business centre, Clarington has been perceived as a great place to do business as approximately 86% of survey respondents recognize the business climate here as good or excellent.

Additionally, over the past three years, 33% have experienced a positive attitude change towards Clarington as a place for business. Advantages of this can be seen in Figure 5, with the top three advantages being the proximity to highways and transportation, geographical location and local workforce/business community. Alternatively, Figure 6 illustrates the top disadvantages of Clarington as a place to do business, with the top three being traffic and transportation, the cost of doing business and distance from markets.

Figure 5: Community Advantages as a Place to do Business

What are the community's top three advantages as a place to do business?	
	Percentage
Proximity to Highways/Transportation	23%
Geographical Location	21%
Local Workforce/Business Community	21%
Cost/availability (i.e. land, taxes, serviced land)	17%
Quality of Life	19%

Figure 6: Community Disadvantages as a Place to do Business

What are the community's top three disadvantages as a place to do business?	
	Percentage
Traffic & transportation	24%
Cost of doing business	14%
Distance from markets	14%
Municipal services/government	11%
Access to labour	11%
Internet services	11%
Lack of space/land	11%
No water/sewer	5%

For many factors, there was a high no response rate on their impact on the business climate, such as for availability of serviced lands, cost of lands, development permit process and development charges. As noted above, many of the businesses surveyed have been established in their location for decades and therefore their knowledge of these factors is limited.

In terms of land and building availability only 10% rated availability of space for rent or lease as good or excellent and 38% rating it as poor to fair. Access to available serviced land sits at a 43% poor to fair rating and land costs are rated 28% as good to excellent. This clearly demonstrates a gap in appropriate existing serviced land and building inventory in Clarington.

62% of our survey respondents felt these questions were applicable to them. Those that commented on these questions rated the development/building permit process as 62% poor and 38% fair to good. Of those that commented on development charges 54% rated as fair to good. It is important to note that the development process would be a one-off conversation for most respondents unless in the development sector.

The survey touched on transportation infrastructure and identified a 76% good to excellent rating for local roads and streets and Regional/Provincial roads and highways, with 34% being satisfied with repairs of these roads.   38% rated proximity to rail and airports as good and excellent.

Of the seven essential services and fees associated to business operations respondents rated based on affordability and availability of the following services.

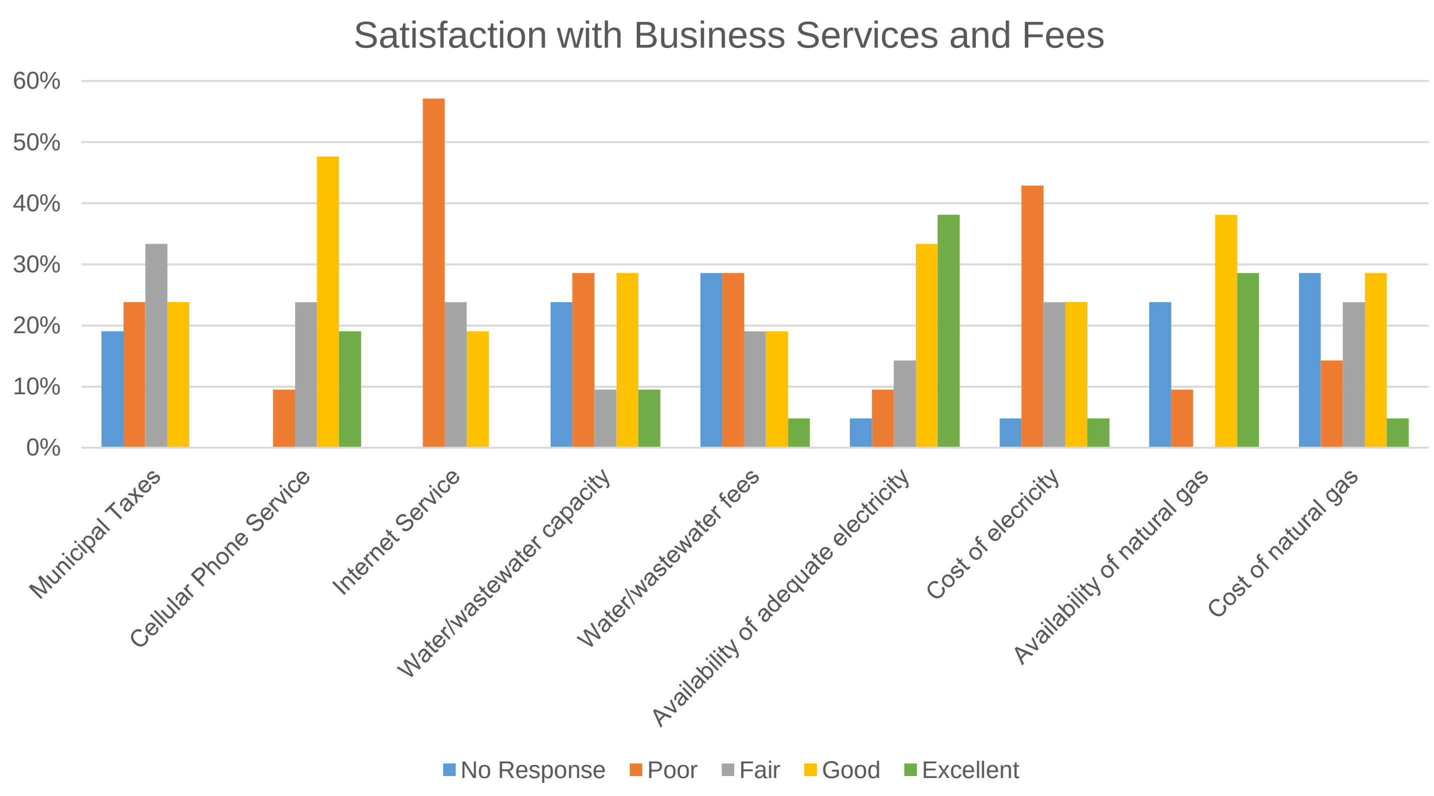


Figure 7: Satisfaction with business services and fees

To provide a good business climate, Clarington must also serve as a desirable place to live to support population growth. The success in achieving this goal was proven by the survey as 52% of respondents rate the quality of life in this community as good and 48% as excellent. This encompasses several different aspects and services provided, many of which can be seen in Figure 7 on both a large scale and as per each individual community.

When posed with the question “do you feel supported by the Municipality”, 62% responded good to excellent and 90% feel supported by local business. Support from residents is less applicable to their businesses. Respondents rated the services of the Board of Trade 81% as good and excellent and Economic Development services 76% good and excellent.

Respondents noted in the range of 53% satisfaction with elementary, secondary and post-secondary schools and 53% rated the local workforce as good or excellent.

Childcare services, community development fund, small enterprise centre, received a high no response rate, thus indicating that these amenities are not as highly prioritized or understood by this group. Further, there seems to be little involvement or understanding of planning, engineering, zoning, or health department services.

Conclusion

Overall these sectors demonstrate a high satisfaction rate of the Clarington community as a place to do business and provide excellent quality of life for their employees. They feel supported and valued in the community and there is a strong commitment to participate in building a strong economy in Clarington.

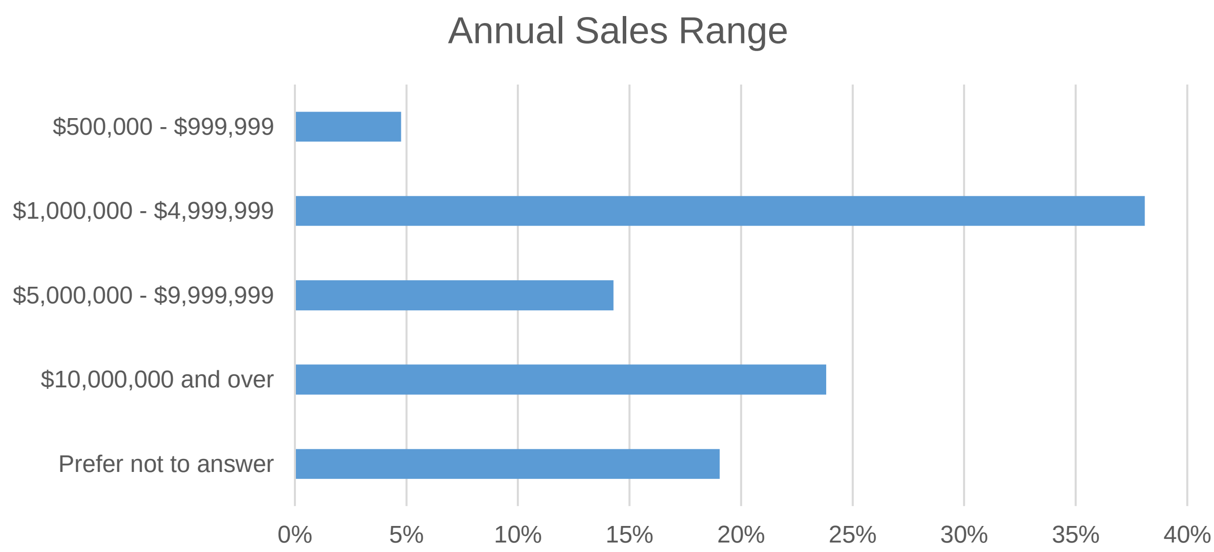
Proposed Actions:

1. Explore ways to incent development of new rental space and serviced land
2. Continue to build programming to bridge partnerships and support
3. Elevate the conversation regarding traffic functionality

Business Development

Business Development refers to the growth and development of businesses within Clarington and industry trends. When asked the question of what their outlook is for their respective industries, there was a 52% response rate who saw their industry as growing, while 29% saw it as stable, and only 14% responded as either declining or unsure. Annual sales ranges of businesses varied, as can be seen on Figure 9, but of the 17 participants that chose to share their annual sales, 65% have sales between $1,000,000 and $10,000,000 and 67% of respondents believed that their projected sales would increase in the next year, with 29% saying it would remain the same.

Figure 8: Annual Sales

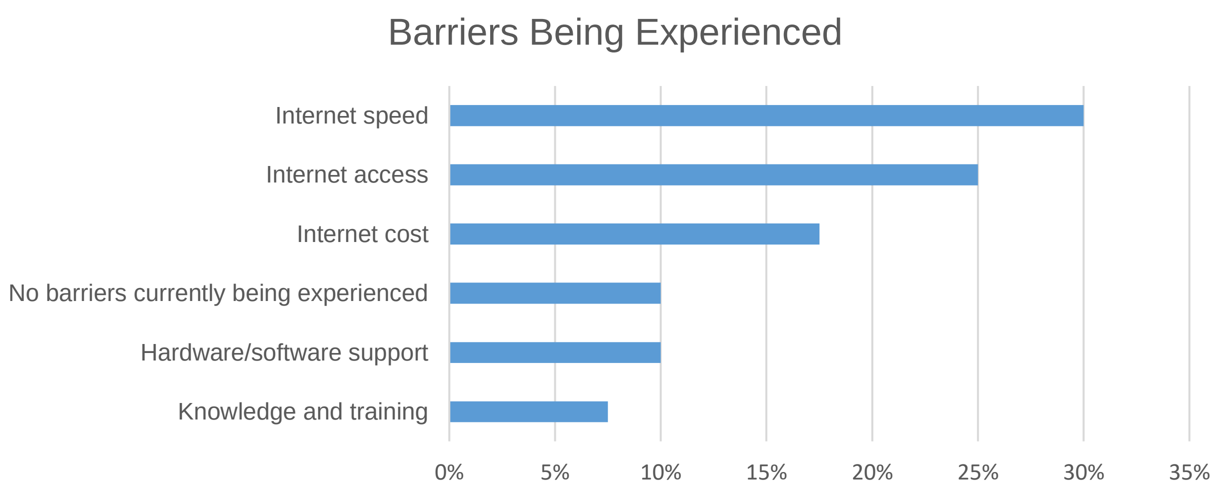


In relation to use of technology in their business, there was a high rating of implementation, thus highlighting the importance of good local internet coverage. 76% of respondents also said they are currently experiencing barriers related to information technology requirements. The top three barriers are noted as internet speed, internet access and internet cost (figure 9)

When questioned whether respondents would be interested in working co-operatively with other businesses in the community to pursue certain objectives, two overwhelming responses were noted. 43% answered that it would be beneficial for networking and information sharing, and 43% said for joint training. In addition, joint marketing and joint product purchasing garnered a high response rate.

In terms of leasing or owning their business facilities, 33% of Clarington businesses lease, while 67% own. For those who lease, lease expirations ranged evenly from this calendar year to over 3 years from now, and 71% responded that they did not anticipate any problems in renewing their lease.

Figure 9: Barriers related to technology



Conclusion

There is a strong vision for industry and business growth by our participants. While most respondents display confidence in their industries growth, having effective, reliable internet is crucial to realizing, matching and surpassing industry trends. There is also a strong appetite for partnership and collaboration.

Proposed Actions:

1. Continue to find solutions for internet/broadband access
2. Continue robust Corporate Call Program and focus on Collaboration, networking and information sharing.
3. Monitor growth needs and support programs available

Workforce

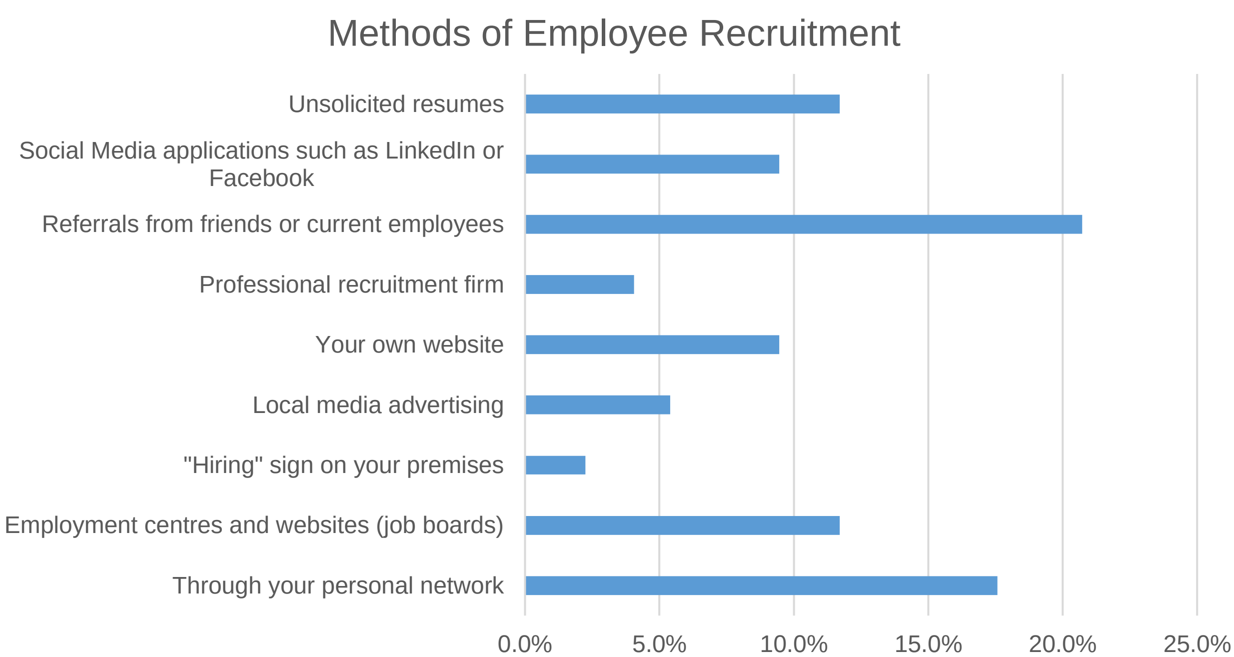
Workforce refers to all aspects of employment, including factors such as the availability of qualified employees in Clarington and the ability to retain employees. When respondents were asked whether the number of people they employ in their business has increased, decreased, or stayed the same over the past three years, 67% noted an increase and 24% noted their employee count had remained the same, leaving 9% seeing the numbers of employees in their business decrease. Of the 67% that reported increases in the last three years, 204 jobs were created in this sector. This represents the ongoing growth of businesses in Clarington.

(new paragraph) Availability of workers in Clarington received a rating of 24% saying good, while 71% noted this to be poor to fair, this information provides an opportunity for further discussion to better understand this ranking. 43% of respondents felt that the stability of the workforce here is good to excellent.

In terms of attracting new employees and retaining employees, these received ratings of 28% and 67% as good or excellent, respectively. However, respondents expressed challenges with 67% of businesses experiencing difficulties with hiring. Reasons ranged from 34% citing lack of relevant experience, 32% citing lack of appropriate skills or training, and 26% citing too few applicants. Hiring challenges were identified as being industry related by 77% of respondents compared to a 23% rate due to community. Only 24% of businesses were experiencing problems with retaining employees and the main reason for this was wages and competition.

Employees were recruited in a variety of ways. The three most popular methods were through referrals from friends or current employees, contacts through their personal network, and employment centres and website job boards. One respondent suggested creating an online board specific to the community where local resumes could be posted and more easily found by those looking to hire. See Figure 10 for full list of recruitment methods.

Figure 10: Recruitment methods



When asked if their businesses currently participated in any co-op, internship, or apprenticeship programs, 43% said they take advantage of these programs and 67% noted that they do use external training. 81% of respondents said they were not experiencing any barriers to receiving the necessary training, but for those that were, these barriers were cited as an even split between awareness of existing training, awareness of training support programs, availability of training locally and inability for release employees. Only 37% of respondents identified that there are training programs and topics that would benefit their employees.

Conclusion

Business is experiencing a steady growth in workforce requirements as business is growing and new jobs are being created. While there is significant satisfaction with the local labour force, employers have difficulty reaching the local labour pool. A gap in the level of skill has also been acknowledged.

Proposed Actions:

1. Create a collaborative portal to match local employment with local workforce
2. Identify skills gap and work with Durham College, UOIT and Durham Workforce Authority to create programming that fits the needs of employers
3. Increase awareness of local training programs

Future Development

This section seeks to identify Clarington businesses thoughts and plans for their future, involving topics such as expansion, relocation, and retirement. In the next 18 months, 50% of businesses plan on expanding, 41% plan on remaining the same. Of the respondents that have identified expansion plans they have noted that their expansion will lead to increase in workforce, an increase in floor space, additional product lines, additional customer service and an increased need to employee training. Chart (fig 12). When asked if they would be accessing federal or provincial programs to assist with their expansion 64% had noted that they will not while 36% will take advantage of these programs. For those that had not planned to access programs they are interested in learning more. Of the 36% that are currently experiencing difficulties with their expansion plans all recognize that there is support in the community to help them.

Figure 11: Business Future Plans

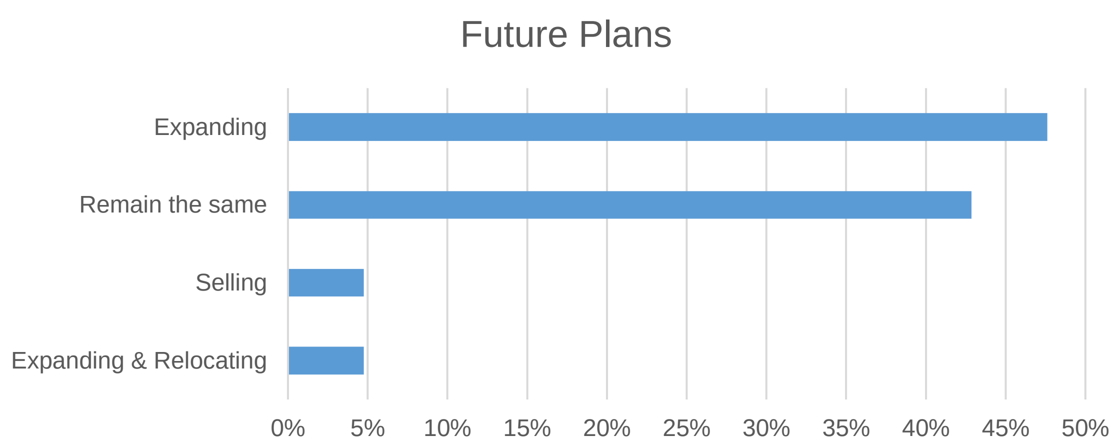
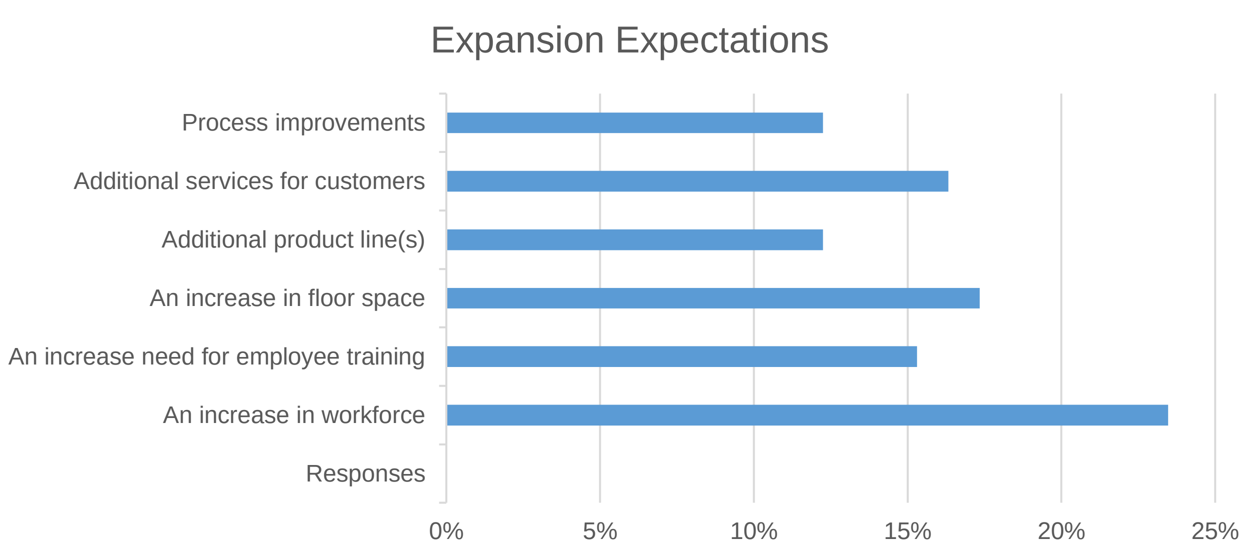


Figure 12: Expansion Expectations



Conclusion

There is confidence for expansion plans both for physical space and number of employees. This group has indicated that they would like to learn more about supporting programs for their growth.

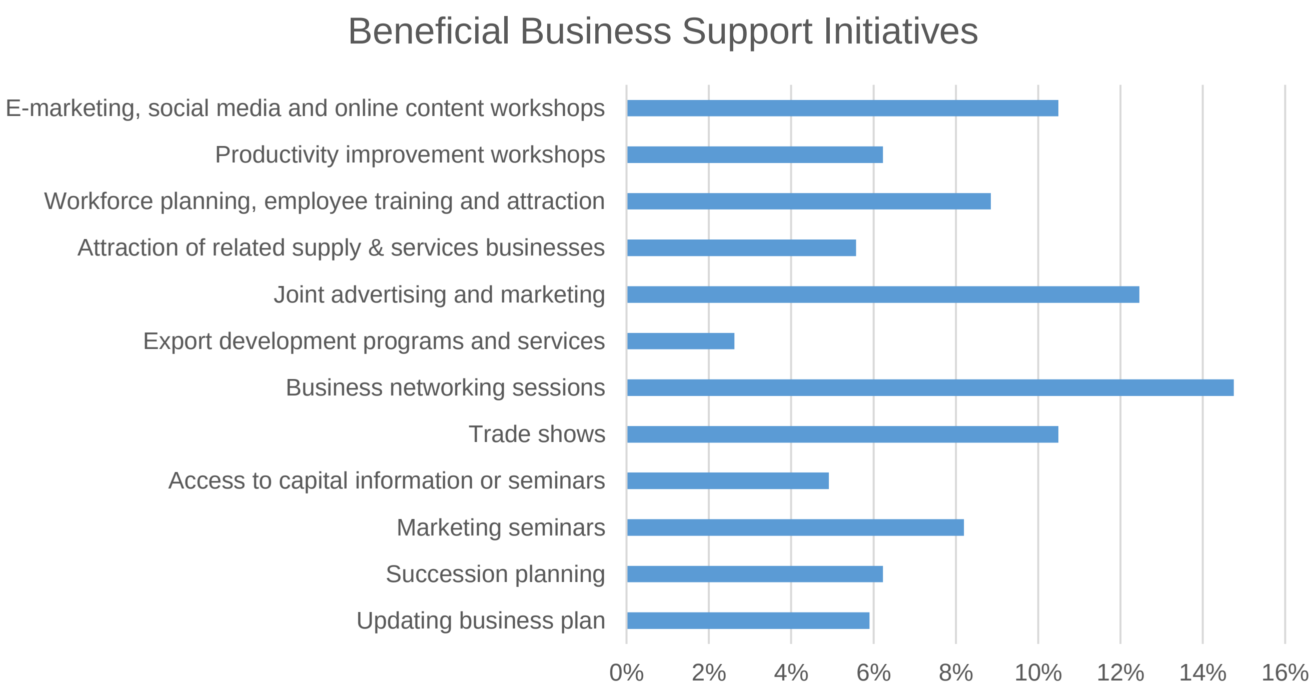
Proposed Actions:

1. Develop programming geared to support growth
2. Provide education of existing programs from all sources
3. Encourage the development community to create appropriate space for future and current trends

Community Development

Workforce planning, employee training and attraction, business networking sessions and succession planning topped their list of beneficial support. This list was followed by tradeshows, productivity workshops, attraction of supply and service business and export development programs and services. All participants would like to be kept informed on the results of the survey.

Figure 13: Business Support Opportunities



Conclusion

This group is very interested in participating in programming to support the growth and development of their business, products and employees.

Proposed Actions:

1. Focus on Human Resource development support
2. Provide industry specific networking and collaboration opportunities
3. Provide marketing support

Construction/Industry

Our manufacturing, construction and life science business are growth sectors for Clarington. Their optimism and proven growth is a very important job creator in our community.   It is important for us to recognize the unique opportunities for these sectors.

In the last two years 72% have made major investment in equipment or machinery. When asked if they compete for business with sister plants within their corporation 100% said they do not.

72% have introduced new products to market in the last year. With this innovation in play, it is surprising that only 35% of these businesses take advantage of the Scientific Research and Experimental Development tax credit offered by the federal government. Additionally, only 11.8% would like to receive information about the offered tax credit. Most of these companies spend less than 3% of sales on R&D, 64% plan to stay the same and 36% have plans to increase this percentage. 79% of this R&D is done in Clarington locations.

75% of the businesses export with the majority as single market exporters. The top three export destination for Clarington product is USA 40%, Central/South America 20%, and Europe 16%. When asked what percentage of sales are exported, 31% of the businesses put this in the range of 0-9%, followed by 31% of the businesses in the 25-49% range. Only 13% are looking for new export markets. With many programs for exporting in play only 24% of business would like information on exporting programs.

Figure 14: Export Sales

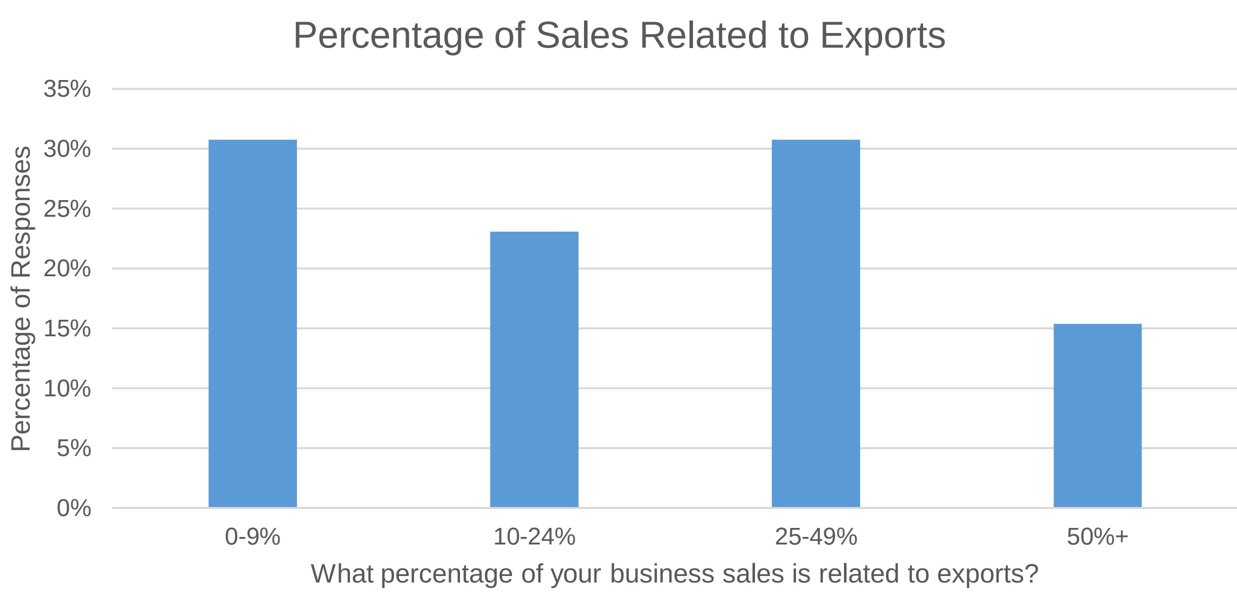
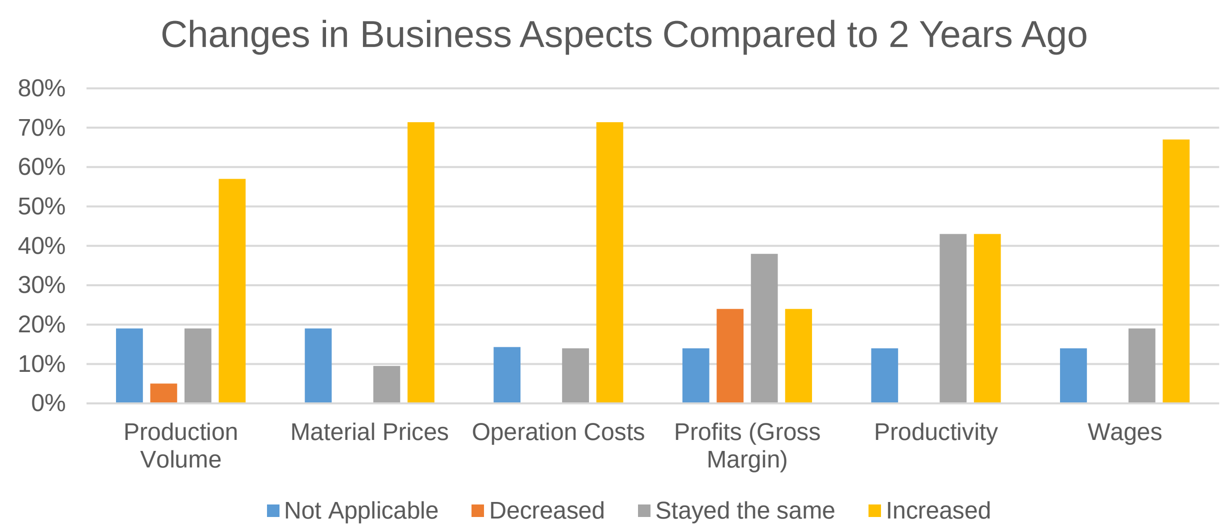


Figure 15: Changes in Business Aspects Compared to 2 Years Ago

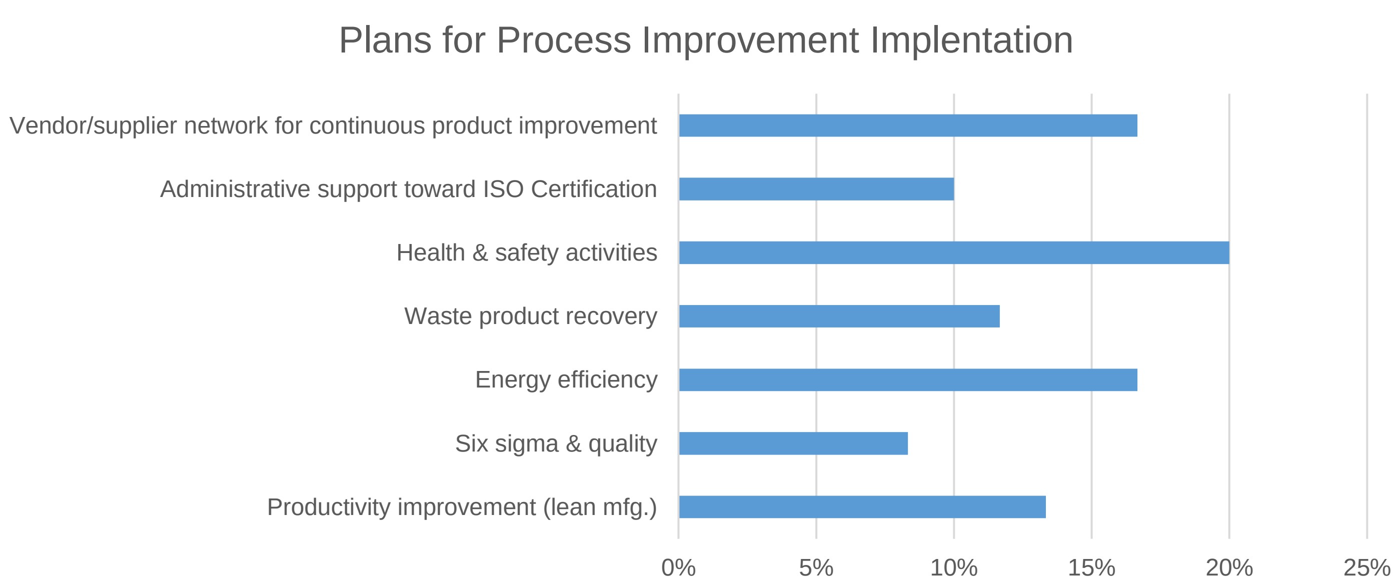


When looking at the life cycle of primary products 38% state maturing product and 19% identified growing product. 93% of the businesses say that the market is aligned with their life cycle.

We asked if new technology, training or innovation will change primary products, 44% responded yes while 56% responded no. Of these respondents 67% noted concerns or barriers to incorporating these new technologies, training and innovation.

Plans for process improvements are led with Health and Safety at 20% followed by Energy Efficiency and Vendor/supplier network for continuous product improvement at 17% and Productivity improvement (lean manufacturing) at 13%. Waste product recovery, administrative support toward ISO certification and Six Sigma & Quality are also ranked by importance.

Figure 16: Plans for Process Improvement



67% noted that their facility or equipment is currently at capacity, 22% are underutilized and 11% need some modernizing. For those underutilized 100% are interested in cooperating with other business to bring the plant or equipment to full capacity. 88% of respondents have plans to modernize. There is mixed experience with funding as 56% have used funding in the past and 44% have not. 28% have projects they are looking for funding for.

Conclusion

As businesses introduce new products into the market, the majority seem to be unaware of funding opportunities that can support innovation. In addition, although a lot of research and development (R&D) is currently happening in these sectors, there is little appetite to take advantage of provincial and federal R&D funding. While operational and materials costs increase, businesses are still investing in their business to stay competitive and ahead of the market.

Proposed Actions:

1. Support grant application for new machinery equipment investment
2. Health and safety training
3. Supplier/vendor coordination improvement
4. Portal to share resources

Overall Conclusion

Participants expressed an overall positive outlook on operating and growing their business in Clarington. They continue to invest in their business and employees and this is reflected in their longevity, strong relationships with neighbouring business and commitment to community – contributing to a strong economy. There is a notable desire to modernize services such as internet and a desire to make connections to resources that facilitate access to skilled labour and programs - helping industry remain competitive and stay ahead of the ever-changing market.

The Ontario Ministry of Agriculture Food and Rural Affairs (OMAFRA) has identified 9 categories with 61 unique activities for a success Economic Development strategic plan. CBOT currently participates or leads in 41 of these activities. Each section of this survey provides us with current and relevant information on the needs of our business community in today's markets.

Through our corporate calling program, we foster collaborative relationships with our business leaders which helps us develop programming and support that will have a direct impact on their ability to strengthen Clarington's economy.

All activities that stem from the results of this survey will be measured through the best practices of OMAFRA's guidelines and the effectiveness to business in Clarington.

This survey acts as a starting point in conversation. Survey participants identified that they would like to stay engaged and understand the results of this survey and provide input into the outcomes from this project.

Appendix

	Excellent	Good	Fair	Poor	No Response
Fire services	57.1%	33.3%	4.8%	0.0%	4.8%
Chamber of Commerce/Board of Trade	52.4%	28.6%	19.0%	0.0%	0.0%
Quality of life	47.6%	52.4%	0.0%	0.0%	0.0%
Support from other businesses	38.1%	52.4%	4.8%	0.0%	4.8%
Availability of adequate electricity	38.1%	33.3%	14.3%	9.5%	4.8%
Availability of adequate housing	33.3%	38.1%	14.3%	4.8%	9.5%
Police services	33.3%	52.4%	4.8%	4.8%	4.8%
Availability of natural gas	28.6%	38.1%	0.0%	9.5%	23.8%
Local roads and streets	23.8%	52.4%	14.3%	9.5%	0.0%
Regional/Provincial roads and highways	23.8%	52.4%	14.3%	9.5%	0.0%
Availability of health & medical services	23.8%	66.7%	0.0%	4.8%	4.8%
Support from Municipality	19.0%	42.9%	19.0%	14.3%	4.8%
Cellular phone service	19.0%	47.6%	23.8%	9.5%	0.0%
Economic Development services	19.0%	57.1%	4.8%	4.8%	14.3%
Library services	14.3%	28.6%	4.8%	0.0%	52.4%
Recreation facilities	14.3%	42.9%	4.8%	0.0%	38.1%
Parks and open spaces	14.3%	47.6%	4.8%	0.0%	33.3%
Workforce	9.5%	42.9%	33.3%	9.5%	4.8%
Proximity to rail & airports	9.5%	28.6%	14.3%	19.0%	28.6%
Support from local residents	9.5%	33.3%	9.5%	0.0%	47.6%
Water/wastewater capacity	9.5%	28.6%	9.5%	28.6%	0.0%
Post-secondary education (college, university and private college)	9.5%	42.9%	9.5%	9.5%	28.6%
Land Costs	4.8%	23.8%	23.8%	9.5%	38.1%
Availability of space for rent or lease	4.8%	4.8%	19.0%	19.0%	52.4%
Water/wastewater fees	4.8%	19.0%	19.0%	28.6%	28.6%
Cost of electricity	4.8%	23.8%	23.8%	42.9%	4.8%
Cost of natural gas	4.8%	28.6%	23.8%	14.3%	28.6%
Business Improvement Area (BIA)	4.8%	23.8%	9.5%	14.3%	47.6%
Health department/health unit approvals	4.8%	28.6%	9.5%	0.0%	57.1%
Cultural facilities	4.8%	19.0%	4.8%	4.8%	66.7%
Garbage/recycling	4.8%	42.9%	4.8%	14.3%	33.3%
Availability of Serviced Land	0.0%	23.8%	14.3%	28.6%	33.3%
Development/building permit process	0.0%	9.5%	14.3%	38.1%	38.1%
Development charges	0.0%	14.3%	14.3%	23.8%	47.6%
Municipal property taxes	0.0%	23.8%	33.3%	23.8%	19.0%
Internet service	0.0%	19.0%	23.8%	57.1%	0.0%
Child care services	0.0%	4.8%	28.6%	0.0%	66.7%

	Excellent	Good	Fair	Poor	No Response
Schools (elementary & secondary)	0.0%	52.4%	9.5%	0.0%	38.1%
Workforce planning/development board	0.0%	33.3%	9.5%	0.0%	57.1%
Community Futures Development Corporation (CFDC)	0.0%	4.8%	4.8%	4.8%	85.7%
Small Business Enterprise Centre	0.0%	0.0%	0.0%	9.5%	90.5%
Planning, engineering, zoning and building permits	0.0%	19.0%	33.3%	14.3%	33.3%
Street/road repair	0.0%	33.3%	38.1%	23.8%	4.8%
Snow removal	0.0%	66.7%	19.0%	9.5%	4.8%
Public transit	0.0%	28.6%	19.0%	14.3%	38.1%