WHAT WE HEARD

National Workforce Strategic Plan: Action Symposium

September 28, 2023







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Executive Summary

The agriculture and food and beverage manufacturing sectors face substantial and persistent labour and skill shortages. In these sectors, labour and skills shortages are constraining growth and are forecast to worsen. By 2030, Canadian farms are expected to face a domestic worker shortage of 101,000 people. The food and beverage manufacturing industry, Canada's largest manufacturing employer, faces a workforce shortage of 142,000, approximately 50% of its workforce by 2030.

The Canadian Agricultural Human Resource Council (CAHRC) together with its partners the Canadian Federation of Agriculture and Food and Beverage Canada are implementing National Workforce Strategic Plan for Agriculture and Food and Beverage Manufacturing. The Strategic Plan is a national actionable roadmap that includes short, medium and long-term solutions to address both immediate labour shortages and systemic workforce challenges for the agriculture and food and beverage manufacturing sectors.

CAHRC held a National Workforce Strategic Plan: Action Symposium in PEI on September 12, 2023 to better understand the perspectives of the sector and to identify areas of concern and required action to remedy.



A summary of the consultation noted the following findings:

- Clearly articulate career paths and professional development opportunities, to improve positive perceptions of the industry.
- Understanding the workforce profile (current and potential) is key to making improvements in attracting and retaining domestic workers, immigrants or foreign workers.
- Provide peer support and mentorship opportunities.
- Consider how all employees perceive the workplace culture. Apply a DEI lens consistently. Consider the needs of Indigenous workers and new entrants.
- Create processes for employee suggestions and feedback.
- Explore current recruitment and retention strategies.
- Examine the challenges and impacts of not acting.
- Understand and analyze the reasons for turnover.
- Explore opportunities and options to improve recruitment and retention of immigrants and foreign workers.
- Improve collaboration and establish national benchmarks that are aligned across all stakeholders, including government, education, and industry.

- Create clear definitions of skilled workers in agriculture and foster improved awareness of upskilling and reskilling for existing workers and potential career seekers.
- > Better understand how to move workers from labour to more technological roles.
- > Sustainability for a strong and equipped labour supply requires long-term planning.
- > Understanding the impact of new and emerging technologies is key to making improvements.
- > There is a need to develop key performance metrics and understand the return on investment.
- Earlier consultations with stakeholders also noted that developing skills is not enough, there also needs to be a strong promotion of the industry to increase its attractiveness and recruit sufficient workers.
- > There is a need to shed light on the vast opportunities and diverse roles in high-tech areas like robotics, software development, and artificial intelligence. A lack of understanding about the industry leads to underestimation of these opportunities, which contributes to the sectors' skills gap.
- There is also a crucial need to ensure the transfer of knowledge and skills to the next generation. This is especially acute in agriculture where 37% of the workforce is expected to retire over the next decade.

Introduction

Canada's Agri-Food Sector is Vital

Canada's agriculture and agri-food system employs 2.3 million people and accounts for one in nine jobs, or 11% of total Canadian employment. The agriculture and agri-food system is diverse, encompassing primary agriculture, food and beverage manufacturing, input and service suppliers, food distribution, retail, wholesale, and foodservice industries. In every region, this sector is an important source of economic activity and contributes \$144 billion, or 7%, of Canada's annual Gross Domestic Product (GDP).

Agriculture has played an important part in Canada's economy since the country's founding, and primary agriculture production, those activities that take place within a farm, nursery or greenhouse, continues to expand to this day. In 2022, primary agriculture producers recorded \$87.7 billion in farm market receipts, an all-time high. Employing more than 350,000 people, Canada's primary agriculture sector plays a significant role in feeding both Canadians and the world; it is a major global producer of many agricultural products, and it is the fifth largest exporter of agricultural products in the world.

Food and beverage manufacturing is the second largest manufacturing industry in Canada in terms of value of production with sales of goods manufactured worth \$153.6 billion in 2022; it accounts for 17% of total manufacturing sales and for 2% of national GDP. Food and beverage manufacturing is the largest manufacturing sector in terms of employment and, in 2022, employed for 300,000 people and supplies approximately 70% of all processed food and beverage products available in Canada.

Yet Challenges Loom

However, Canada's agriculture and food and beverage manufacturing sectors face significant labour challenges that puts their viability and growth potential at risk. Although labour and skills shortages are a challenge for employers in many sectors across the country, they are particularly acute for employers in agriculture and food and beverage manufacturing. Food Processing Skills Canada estimates that more than 28,000 agriculture jobs were unfilled in the agriculture sector during peak season in 2022. The food and beverage manufacturing industry currently faces a workforce shortage of approximately 20 percent.

Unfilled vacancies have consequences. Employers experiencing labour shortages in agriculture reported on average a 3.7% decline in sales in 2022, which, when applied to total sales in agriculture, resulted in an estimated \$3.5 billion loss in total sales. In addition, Canada's 8,800 employers in the food and beverage manufacturing sector faced \$3.6 billion in losses of net revenue in 2023.

Persistent labour and skills shortages are forecast to increase. By 2030, Canadian farm businesses are expected to face a domestic worker shortage of 101,000 people; the food and beverage manufacturing sector expects a shortage of 142,000 people by 2030, almost 50% of its workforce.

Farms and food processing facilities are becoming more technologically advanced and will require a higher proportion of workers with digital skills to make full use of newly available technology. However, some workers may not possess the digital skills needed in the future. Nearly 4,600 workers considered 'high risk, low mobility' (HRLM) employed in agriculture and food and beverage processing are at risk of losing their jobs to automation between 2023 and 2030. By 2030, employment in HRLM occupations in the food and beverage processing sector is expected to drop by 1.6 per cent, resulting in the loss of nearly 3,000 jobs, which will largely be comprised of process control and machine operators, bakers, and fish and seafood plant workers.

Solving the current and future structural shortage of Canadian workers and decreasing unfilled vacancies will not be easy. It is essential that plans are in place now to ensure there are enough people with the right skills to continue growing the agriculture sector. The *National Workforce Strategic Plan*, a collaborative approach of Canada's agriculture and food and beverage industry, is a promising step towards achieving workforce stability by 2030.

National Workforce Strategic Plan

CAHRC, together with partners the Canadian Federation of Agriculture and Food and Beverage Canada announced the launch of the National Workforce Strategic Plan for Agriculture and Food and Beverage

Manufacturing in 2021. Developed around five key pillars, the Strategic Plan is comprehensive, actionable and broad, as well as capable of adapting to changing times and realities. It includes short, medium and long-term solutions to address both immediate labour shortages and systemic workforce challenges.

The Strategic Plan is the launching point for what will be a comprehensive roadmap to workforce stability for the agriculture and food and beverage manufacturing sectors.

Funded by the Government of Canada's Future Skills Centre, this industry-led initiative complements the work identified in the Prime Minister's Mandate Letters to Ministers Marie-Claude Bibeau and

CANADA'S SKILLS
DEVELOPMENT
ECOSYSTEM REQUIRES
FUTURE-FOCUSED
INNOVATION TO
DRIVE INCLUSIVE
ECONOMIC
PROSPERITY AND
GROWTH. THE SKILLS
SYSTEM OF THE PAST
WON'T MEET THE
NEEDS OF THE FUTURE
- FUTURE SKILLS
CENTRE

Carla Qualtrough tasking them with developing an Agricultural Labour Strategy for farming and food processing.

The goal of the *Strategic Plan* is that 'by 2030, the agriculture and food and beverage manufacturing sectors will have a vacancy rate that is lower than the Canadian average.'

To realize this vision, CAHRC's efforts towards the *National Workforce Strategic Plan* to date have included:

- Established Steering Committee (April 2021)
- Background Research and Model Development (Summer 2021)
- Established Advisory Committee (Fall 2021)
- Established Goals, Objectives, KPIs (Winter 2022)
- Launched the Plan (April 2022)
- Established 5 Working Groups (Summer 2022)
- Validated Goals, Objectives and KPls, Conducted SWOTs, Developed Interim Report, Established Work Plans Outlining Actions (Fall 2022 – Winter 2023)
- Research Phase (Spring Summer 2023)
- National Workforce Strategic Plan: Action Symposium (Fall 2023)

Action Symposium

This report provides a summary of the *National Workforce Strategic Plan*: Action Symposium held in Charlottetown, PEI on September 12, 2023. Participants from the agriculture and food and beverage manufacturing sectors were invited to share their perspectives on challenges facing the industry and recommendations for moving forward. The event hosted 42 participants including producers, association representatives and government officials representing a breadth of the agriculture and food and beverage manufacturing sectors from across Canada.

The report is intended as a starting point for discussion and to lay the foundation for strategic actions to secure the future labour supply of Canada's agriculture and food and beverage manufacturing sectors. Of note, no names or identifying features of any participants are used in our reporting to respect the confidentiality of the information shared.

Findings from the Symposium are organized around the 5 key pillars of the National Workforce Strategic Plan for Agriculture and Food and Beverage Manufacturing, as described in more detail in the following section.

- Perception and Awareness
- People and Workplace Culture
- Immigration and Foreign Workers
- Skill Development
- Automation and Technology

Support for the event was provided through a partnership with the Future Skills Centre (FSC). FSC's is focussed on strengthening Canada's skills-development ecosystem so that Canadians can look to a future of meaningful and relevant lifelong learning opportunities. FSC's work is driven by research and insights, investing in innovative skills approaches across 240+



partnerships across Canada, engaging with partners spanning diversity of regions, sectors and populations.

Highlights of What We Heard

Findings from the Symposium are organized around the 5 key pillars of the National Workforce Strategic Plan for Agriculture and Food and Beverage Manufacturing.

- 1. Perception and Awareness
- 2. People and Workplace Culture
- 3. Immigration and Foreign Workers
- 4. Skill Development
- 5. Automation and Technology

Each pillar offers a description of the specific goal for that area and what we heard during the symposium including recommendations for moving forward.

Also, included in the discussion are foundational themes for consideration.

Automation and Technology

GOAL

The adoption of automation and technology is used to apply the skills of an agile labour force and increase productivity and competitiveness.

How Will We Get There:

- Increase adoption of automation and technology across the agriculture and food and beverage manufacturing sectors.
- Ensure the workforce has the necessary skills for evolving automation and technology.

Key Performance Indicators

- Measure increased capital investments
- Measure increases in labour productivity
- Measure employer perception of alignment of skills with needs
- Measure skills gap through LMI

Short-term Actions

- Barriers to adoption research is underway which will inform strategies to support industry.
- Research to understand impact of automation, digitalization and technology on workforce (skills and jobs) is underway.
- There is a need to increase programming to connecting employers with skilled workers.

Recommended Actions

Sustainability of a strong and equipped labour supply requires long term planning

Participants noted that more efforts related to sustainability are needed. This includes fostering
awareness of both the importance of the agriculture and agri-food sectors as viable career choices.
Awareness raising should begin in elementary school.

Understanding the impact of new and emerging technologies is key

- Identify specific knowledge and skills gaps in the current workforce. Caution should be used to avoid
 unrealistic expectations of automation and technology. Upskilling takes time and planning. Full
 adoption of automation is impossible if skills are missing.
- Leadership is crucial. There is a need for people who can lead and/or manage the adoption of automation and technology. Explore change management options and supports for transitioning.
- Explore how other sectors have embraced automation and technology and how the workforce has adapted.
- What skills will be in demand in the future? The need for writing skills should also be explored.
- Explore incentives to technological adoption. Sustainable Canadian Agricultural Program funding is not always accessible.
- Foster a culture of collaboration over competition. Share best practices. Find synergies.
- Develop programming that creates the conditions for success. Understand barriers to access for learners.

Develop key performance metrics and understand the return on investment

- Create standardized measures.
- Determine the cost of implementing new technologies.
- Factor supply chain issues into analysis of results.

Immigration and Foreign Workers

GOAL

Canada has programs to facilitate the entry of foreign workers and new Canadians into Canada's agriculture and food and beverage manufacturing sectors.

How Will We Get There:

- Ensure continuation of the TFWP, including the SAWP program and establish program(s) that facilitate the entry of foreign workers into Canada to fill year-round jobs.
- Ensure immigration streams to provide clear pathways to permanent residency.
- Increase employers' knowledge of foreign worker programs.

Key Performance Indicators

- Increased public understanding and acceptance of foreign workers
- High levels of compliance with program requirements
- Decreased processing time for foreign worker applications
- Increased number of workers who gain permanent residency status

- Reduction in time between application, entry and granting permanent residency/immigration
- Increasing funding to support tripartite partnerships (employer, community and dedicated worker support groups)
- Increased worker and employer satisfaction programs

Short-term Actions

- Messaging and public communications campaigns are being conducted by some stakeholders (e.g. More than a Migrant Worker). Work in this area continues to expand.
- Research is underway to understanding economic impacts of temporary foreign workers.
- Policy recommendations for programming are under development.

Recommended Actions

Examine the challenges and impact of not acting

- What are the barriers to recruiting and retaining temporary foreign workers?
 - Lack of sense of community
 - Racism
 - Isolation
 - Low wages
 - Cultural and language barriers
 - Lack of suitable housing
 - Inability to obtain permanent residency

Explore opportunities and options to improve recruitment and retention of Immigrants and Foreign Workers.

- Consider increasing numbers of international students in areas such as data and engineering.
- Create coherent policies for temporary foreign workers across Canada.
- Use media to highlight best practices and exemplars.
- Identify pathways and supports to obtaining Permanent Residency Status for immigrants and foreign workers.

People and Workplace Culture

GOAL

The sector is viewed as a desired choice for work in Canada by job seekers and workers.

How Will We Get There:

- Develop and promote workplace culture models for businesses by including the impact of pandemic and post-pandemic on workers.
- Identify how the sector will attract and retain employees in future years.
- Increase recruitment and retention of members of under-represented groups by identifying and addressing barriers to employment.

Key Performance Indicators

- Sector and individual employers recognized as top employer
- Fifty percent of all businesses have a defined EDI action-oriented plan and have participated in HR training by 2025
- Increased share of employers have a written HR Management plan, written policies and SOP's
- Five tools developed to assist employers in decreasing barriers to under-represented groups in the recruitment and retention process
- Members of under-represented groups contributing to the process
- Improved perception of the sector as a place to work (data breakdown by under-represented groups)
- Decreased staff turnover rate (industry, by employer)

Short-term Actions

- Research is underway to better understand:
 - o impact of pandemic on workforce, and
 - current workplace culture, to inform strategies of what can be done to ensure positively enhanced workplace culture.
- Tools, resources and training are under development to support Inclusion, Diversity, Equity and Accessibility in the workplace.
- Surveys for tool uptake are being conducted.
- Communities of Practice are under development.

Recommended Actions

Understanding the workforce profile (current and potential) is key to making improvements in attracting and retaining either domestic workers, immigrants, or foreign workers

- Determine who is entering the sectors, what kind of gaps are there? Who do we want to attract?
- Develop strategic recruitment plans accordingly.
- Understand the needs of new and potential entrants to the sector. Gen Z has different requirements
 than other generations of workers. As they are the workers of the future, we need to better understand
 their needs.
- Equity, diversity, and inclusion lenses matter.
- Employers should invest in their employees to be valued and appreciated.
- Consider work/life balance for all employees.
- Clearly articulate organizational and workplace values, demonstrate these values in action across all levels of an organization.

Provide peer support and mentorship opportunities

Mentorship provides important opportunities for knowledge sharing and career progression.

Consider how all employees perceive the workplace culture

- Leaders play a key role in fostering a positive and healthy workplace culture.
- Take time to change workplace culture. Results may not be immediate.
- Use an EDI lens. For example, for newcomers to Canada, take time to understand their experience.
- Identify and empower individuals who are leaders, change makers, and champions for change.
- Articulate clearly how everyone benefits through workplace change.

Create mechanisms and processes for employee suggestions and feedback

- Provide suggestion boxes for employees.
- Listen and act on employee suggestions
- Demonstrate how feedback has been used.
- Many employees want shorter days or flexible work options.
- Failure to explore employee suggestions and feedback may result in employees leaving the sector to pursue other more flexible work options.

Explore current recruitment and retention strategies, are they working?

- Develop metrics around recruitment.
- Examine efforts around inclusive communities.
- Develop strategies for inclusivity, particularly newcomers to Canada.

Understand and analyze the reasons for turnover

- Develop metrics around retention.
- Understand who is leaving and why.
- Hylife's program can be used as an exemplar. Does providing transportation improve access and retention?
- Create responsive policies.

Perception and Awareness

GOAL

The number of people entering the sector increases by enhancing positive perceptions of employment in the industry and raising awareness of the variety of careers available.

How Will We Get There:

- Increase positive perceptions and address negative perceptions of job seekers and students, targeting the most impactful perceptions for under-represented groups in the economy (regional and national).
- Improve the efficacy, scale and scope of agriculture and food processing career promotions, including the targeting of under-represented groups.

Key Performance Indicators

- Measured progress against the baseline data on perceptions
- Two million Canadians reached with positive messages addressing negative perceptions
- Increased enrollment in and number of ag and food processing programs in PSE institutions
- Doubled the share of under-represented groups entering positions
- Increased number of food processing careers profiled by AITC's ThinkAG by ten
- Increased number of Work-integrated learning (WIL) placements for post-secondary students by 300
- Decreased job vacancies and increased employment by 2025, including regional implications

Short-term Actions

- Baseline research on perceptions of the industry by non-industry job seekers has been completed.
- Results of baseline research will inform the other actions.

Recommended Actions

Refer to People and Workplace Culture discussion results.

Skill Development

GOAL

The development and implementation of a National Skills Strategy ensures the sector's workforce is appropriately skilled.

How Will We Get There:

- Understand, and report on an ongoing basis, the current and future skills needs of the agriculture and food and beverage manufacturing sectors.
- Ensure governments, post-secondary institutions, and private trainers develop and deliver programs that respond to the sectors' evolving skills needs, including life-long learning.
- Build awareness of career and training opportunities.

Key Performance Indicators

- Annually updated register of skills needed
- Measure employment rate of recent graduates in the sector
- Measure skills gap through LMI
- Assessment of employment rate of recent post-secondary graduates
- Increase in numbers of Highly Qualified Personnel (HQP)
- Increased investment in post-secondary education by identifying industry research and development (volume and diversity of contracts)

Short-term Actions

- Skill requirement research is underway.
- A National Skills Framework, with mechanism for updating/real-time data output will be developed in Winter 2024.
- Stronger relationships between industry and education institutions are being built.
- There is increasing activity in work integrated learning (WIL), upskilling, micro credential programs.

Recommended Actions

Improve collaboration and establish national benchmarks that are aligned across all stakeholders - government, education, industry

- Find ways for companies, communities, and governments to work together more effectively.
- Determine strategies for increasing resources and supports (such as financial limitations of SME's).

- The National Skills Framework should be consistent across all stakeholders to ensure that skills gaps are addressed effectively.
- Create partnerships with post-secondary institutions and articulate skills requirements and provide timely labour market information to better align training with the needs of the sector.
- Creating ecosystems for Work Integrated Learning (WIL), and workforce development. Many avenues are needed for employers and communities to collaborate and form partnerships.

Create clear definitions of skilled workers in agriculture and foster improved awareness of upskilling and reskilling for existing workers and potential career seekers

- 'Well skilled workers' may not choose to enter or stay.
- Increase efforts towards skills-based recruitment.
- Increase awareness around importance of skills upgrading to SME's.
- Frame skill development as 'win-win' for all, resulting in increased productivity and employee engagement.
- Explore how to attract new entrants to the industry.
- Build connections with elementary schools, high schools and non-profit youth programs to foster skills in youth.

Better understand how to move workers from labour to more technological roles

- Clearly link training to new roles that employees can fill when completed.
- Offer training in different languages for foreign workers.
- Create training that is culturally specific.

Next Steps

- Build an action plan for the Skill Development working group in collaboration with all stakeholders.
- Develop the National Skills Framework.
- Provide evidence-based research on the importance of skill development for the future of the agriculture and food and beverage manufacturing sector.

Foundational Themes

Understanding the challenges and opportunities around the National Workforce Strategic Plan's foundational themes are key to making improvements in the sector and to meeting its goals.

The following five foundational themes have been identified as essential for the success of the National Workforce Strategic Plan:

- Competitiveness and Profitability
- Data
- Equity, Diversity, and Inclusion
- Indigenous
- Infrastructure

Insights from Symposium participants included the following comments and recommendations:

Competitiveness and Profitability

Considerations

- Skills should align with what the industry requires over the longer term.
- There is an over-saturation of programs and tools. "There's too much out there without knowing what's out there".
- A lack of time to apply for funding limits opportunities for effective and successful collaboration.
- Labour shortages make upskilling challenging.
- Academic institutions need to keep pace with the same technologies as industry to have graduates industry-ready.
- Find early adopters to commit to learning skills.
- Market demand is needed to drive new skills, but the market also must be willing to wait for training and education to take place.
- Learners must be interested in learning. This may be challenging for older workers dealing with new technology in the workplace. Employers can create pathways for new skills development and make it clear this is a reward to learning new skills.

Actions Required

- Develop a consortium to increase collaboration and alignment in developing and delivering training.
- Develop a 'learning culture'.
- Look at other countries' efforts related to upskilling.
- Use the most effective approach when developing and delivering large-scale training.
- Ensure a human approach to reskilling by meeting people 'where they are' and helping clarify how they benefit.
- Increase collaboration. Front line workers can learn from others in industry by sharing knowledge.
- Create forums where people can interact and gain support.
- Identify innovative ways to bring technology to front line users.

Data

Considerations

• Skills Framework with national benchmarks to help ensure consistency.

Actions Required

- Data must be actionable.
- More HR assessments should be considered.
- Productivity audits and HR/technology assessments need to be implemented.

Equity, Diversity, and Inclusion

Considerations

- Accessibility must also be considered.
- DEI must also consider the needs of Indigenous workers and new entrants.
- Leadership should be diversified.
- Avoid tokenism.
- Consider increasing access to culturally appropriate foods.
- Understand the links between people and culture to promote diversity
- Understand the link to infrastructure. Many of those in remote communities do not have a driver's license. Lack of housing can also be a barrier to growing diversity.
- It is important for employers to create a welcoming environment.
- The staff you have may not be open or inclusive to other cultures. Existing staff may have:
 - o lack of understanding/knowledge of other cultures creating a barrier, and a
 - o lack of trust may also be an issue.

Actions Required

- Consistent application of a DEI lens is needed.
- There is a need to see diversity represented, including in social media and as spokespeople.
- There is a need to avoid stereotypes.
- Culture needs to be the primary focus.
- Confront racism. Avoid personal and cultural biases.
- Training should be culturally relevant.
- Access to resources and training for middle management and leadership is important. Also,
 participants that are a part of equity-seeking groups should be invited to champion and support
 advisory groups/working groups.
- Cultural sensitivity training can be provided to all.
- It is important for employers to be aware of the traditions, holidays, small cultural nuances of their workers
- Employers can change their approach to be more inclusive through small gestures (multicultural potluck instead of hot dogs and hamburgers).
- Employers can create opportunities to develop relationships by bringing community together to help support new entrants/new Canadians.

• Link culture to all pillars of the National Workforce Strategic Plan.

Indigenous

Considerations

- DEI programs must also consider the needs of Indigenous workers and new entrants.
- Supporting Indigenous agriculture for Indigenous communities and developing capacity within Indigenous communities is a priority.
- Any conversation about Indigenous agriculture must include cultural practices and the importance of connection to the land.
- It will be essential to understand and address barriers to accessing funds when trying to bring innovation to Indigenous communities.

Actions Required

- Provide a forum for sharing knowledge and learnings from members of Indigenous communities.
- Provide the opportunity for non-Indigenous producers to build a network and share resources with Indigenous producers.
- Provide resource to Indigenous youth about career opportunities in agriculture and food and beverage manufacturing.
- Work with government to reduce barriers to Indigenous communities in accessing resources and sharing knowledge.

Infrastructure

Considerations

• Increase support for employers and local communities in providing infrastructure for temporary foreign workers. Infrastructure challenges include social services, education, health care, and food, in addition to housing. The need for infrastructure support for temporary foreign workers is not just a housing issue.

Actions Required

- Explore opportunities to reduce social, educational, healthcare, and cultural barriers in rural Canada.
- Support teachers so that different cultures, and languages are supported in rural schools.
- Reform regulations and remove those that cause unnecessary backlogs.
- Build understanding of long-term gains.
- Coordinate efforts at all levels with both policy and decision-makers involved.
- Have an advocate to help support newcomers and integration into a community (social, education, food, healthcare). An advocate would be someone who people feel comfortable with, someone who they can identify with, and someone who is representative of their culture/community.
- Consider implementing community navigators (PEI).
- Regional bus systems could support the transportation needs of workers.
- Multi-level government intervention is needed to collaborate in improving infrastructure, including supporting a rural housing strategy.