

Bruce Centre of Excellence

Business Plan

October 2018

Business Plan Overview

The Business Plan for the Bruce Centre of Excellence is a five chapter playbook which includes 1. Overarching Strategy, 2. Business Case, 3. Operating Model, 4. Financial Forecast, and 5. Tactical Roadmap. Together, the five chapters provide the framework for ensuring both short-term and long-term success.



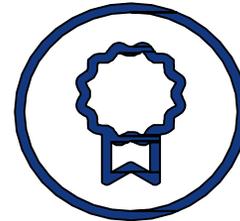
Overarching Strategy

The Overarching Strategy provides a general framework for the Bruce Centre of Excellence's specific goals and aspirations and defines the scope of what the Centre should undertake to create an environment of economic development and innovation in the region. As the term overarching suggests, these strategies will affect everything the Centre undertakes and expects to achieve.



Business Case

The Business Case provides the business rationale for undertaking the project and defines the parameters and management factors involved in developing the Centre of Excellence as it fits into the overall development agenda of the region. It will provide a tool to guide the design, management, and evaluation of the project.



Operating Model

The Operating Model makes it possible to deliver the strategy and business case – how the Centre will deliver value to users as well as how the organization will function. The Operating Model represents the bridge between the strategy and the day-to-day operations that guide the Centre's team, providing the context, and enabling the behaviours that help realize the strategy and vision.



Financial Forecast

The Financial Model provides details on the operational and financial requirements of the Centre. The model will help attract investment and serve as a financial guide to running the Centre. Further, it helps identify future revenue and expenditure trends that may have an immediate or long-term influence on the Centre's policies, strategic goals and/or services.



Tactical Roadmap

The Tactical Roadmap provides an interactive and detailed time-bound analysis of each activity required for successful establishment of the Bruce Centre of Excellence. The roadmap includes the major steps and milestones needed to reach the detailed objectives outlined in each of the previous chapters.

Executive Summary

The key insights from developing the Overarching Strategy, Business Case, Operating Model, and Financial Forecast for the Bruce Centre of Excellence are outlined below.



STRATEGY

- 1 The **mission** of the Bruce Centre of Excellence is to facilitate collaboration between the energy and environmental sectors, government and academia partners in skilled workforce development and business innovation. The **vision** is to be a centralized platform for skilled workforce development and a driver of small medium enterprise growth and innovation in the energy and environmental sectors.
- 2 To achieve the vision and mission, the Centre must leverage the **key strengths** currently facing the region, which include a strong reputation in the energy sector, established support programs already in place, a location ready for build, and a culture/community willing to help. In turn, the Centre must overcome the region's **key weaknesses**, which include a lack of an academic presence, decreasing levels of business to business collaboration and a deficiency of entrepreneurial spirit.



BUSINESS CASE

- 1 The Bruce Centre of Excellence **opportunity is in its infancy** and has **huge growth potential** as there is currently no recognized 'Regional Innovation Centre' ("RIC") located in mid-Western Ontario and no energy specific "RIC" located in all of Ontario.
- 2 With a **growing population**, an **improving labour force**, and **several successful frameworks** from similar innovation strategies, the time is now to advance emerging technologies, build an environmentally and energy focused innovation cluster and utilize existing assets to diversify into alternative industries.



OPERATING MODEL

- 1 With a **not-for-profit organizational structure** and through a **50/50 public/private funding model**, the Bruce Centre of Excellence will offer training development programs, provide career and mentorship services, organize community events and coordinate support services, in addition to many other offerings.
- 2 The Centre will require an **experienced Board of Directors** to guide overarching decisions and must be supported by a **skilled management team** to enable daily operations.



FINANCIAL FORECAST

- 1 The financial forecast illustrates the requirement for **significant upfront government support**, with a **desired future state** of a 50/50 public/private funding distribution.
- 2 Based on **projected expenses** using a cost per square foot approach, the Bruce Centre of Excellence can expect revenue and expenses of approximately **\$2M in year one**, rising to nearly **\$3M by year three**.



TACTICAL ROADMAP

- 1 Scheduled **to begin during Q1 2019**, the first activity needed to be carried out is the selection of the Board of Directors. Subsequent, during Q2 2019 the Fundraising Committee, and Executive Director.
- 2 All **twenty-five activities** must be executed in order to achieve an expected launch date in Q2 2021.

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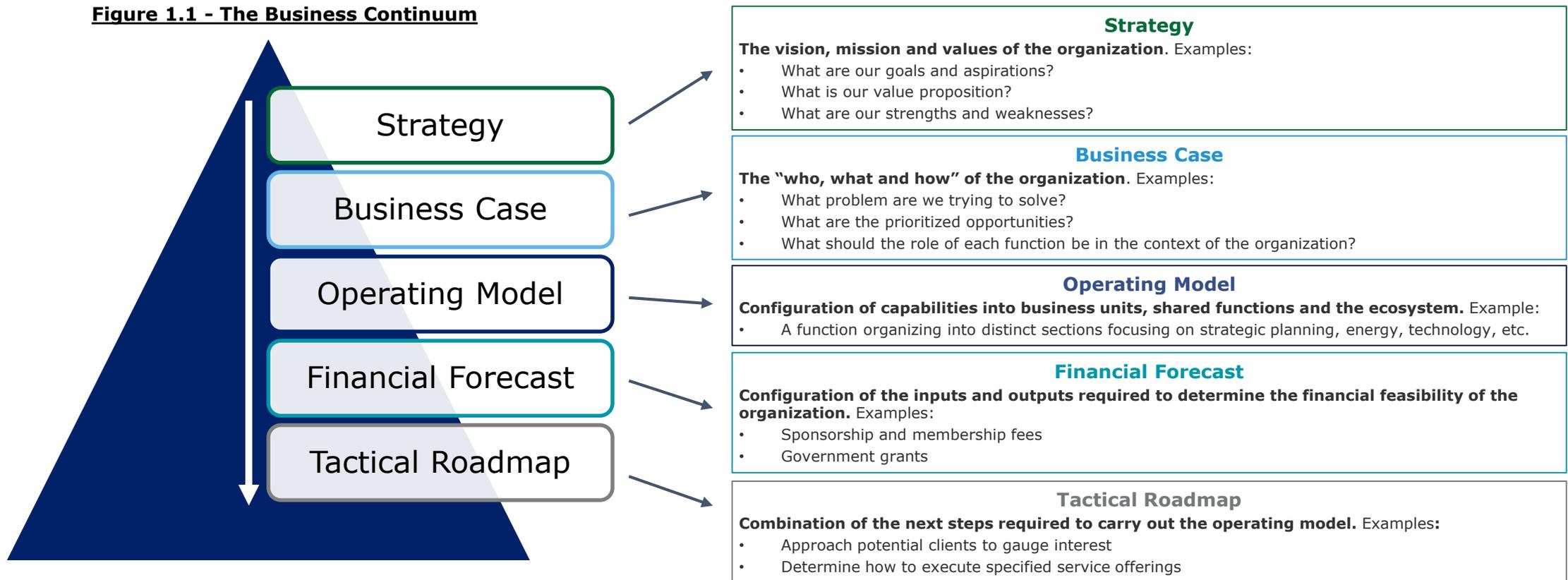
 **Strategy**

Strategy Leading Practices – What’s Next?

In Deloitte’s experience, the leading practice to creating a wholesome business plan leverages a top-down approach, beginning with the development of the vision, mission, and values (as illustrated in the framework below).

- The Business Continuum (figure 1.1) will provide the structure and basis for the analysis of the Bruce Centre of Excellence Business Plan.

Figure 1.1 - The Business Continuum



Strategy Overview

To effectively prepare a business plan for the Bruce Centre of Excellence, it is critical to first lay out the strategy for the components of its makeup. The 'Trades and Skilled Workforce Secretariat' and 'Business Incubation/Acceleration' pillars will be created under a singular operating model but inspired by separate goals, aspirations, and value propositions.

Trades and Skilled Workforce Secretariat

What are our goals and aspirations?

- Be employer driven; working with various private sector organizations to provide collaborative training for various employers in a one-stop shop location
- Be utilized by the school boards to provide opportunities for students to become more engaged in the trades
- Create a platform to advance employer training requirements and provide skills upgrading for underemployed / unemployed
- Develop talent - have an inclusive and robust talent pipeline - that attracts, develops & retains top talent in the region of Bruce County and provides a platform for connecting businesses & workers with potential opportunities
- Help Bruce and the surrounding region residents benefit from economic upswing
- Improve local training opportunities and encourage more local employers to participate in experiential learning opportunities
- Develop clear career path messages for local opportunities and coordinate agencies that are already involved in this arena

What is our value proposition?

- Focus on education early – engaging with both industry and academia from the onset, to capture interest of pre-secondary and post-secondary students
- Trades and skilled workforce development – extend the focus beyond the skilled trades and across multiple industries and become a centralized location and hub for employment opportunities and skills training/programs that benefits current and future industries in the region
- Public and private sector training and development – build reliance in other areas outside of academia, in order to generate robust economic development and training programs
- Entrepreneurship courses - co-development of programming, such as entrepreneurship courses - designed for emerging business leaders and innovators that want to learn the foundations of entrepreneurship



<https://www.rajras.in/index.php/skill-development-rajasthan/>

Strategy Strengths & Weaknesses



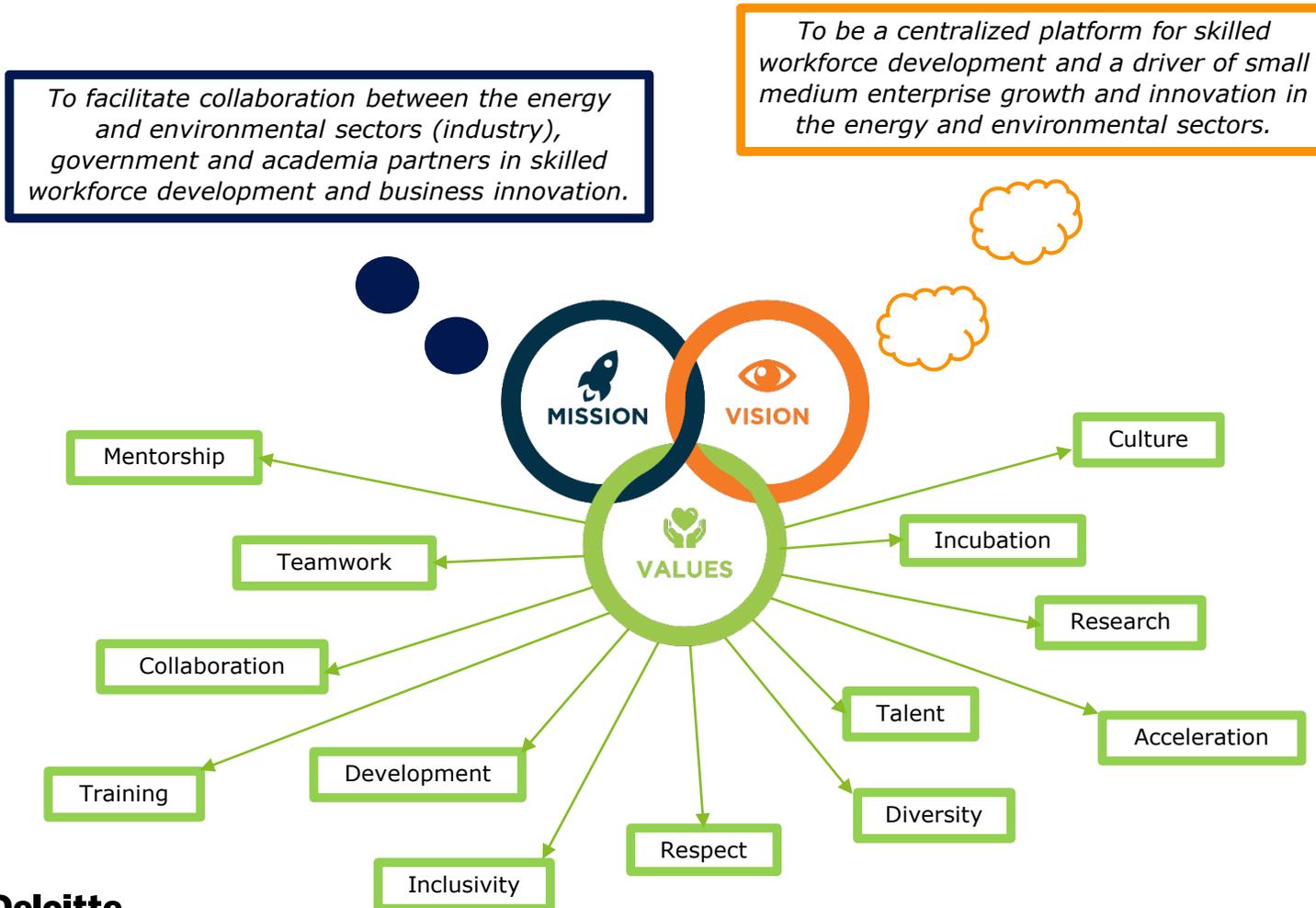
With many successful innovation programs already established in Canada, Bruce County's economy, location, readiness to build, and willing project partners make the area primed and ready to join the movement. This will set the stage for Bruce County to become a national and global centre for skilled workforce development and business incubation & acceleration.

Impact (definition) - each strength and weakness is graded on a scale of potential impact (low, medium or high) and is based on what, how, and who is impacted.

Strengths	Impact
The Bruce Power and Bruce County multi-year partnership that attracts business investment and expansion into the local region has created a cluster of world class intellectual talent.	↑ High
The Bruce region has a strong reputation in the energy sector, allowing the area to build a culture and support system that nurtures entrepreneurial spin-offs in energy but also other industries.	↑ High
The Bruce County region is well-positioned for a centralized skill training facility and program as a number of locations are available for building development.	↑ High
Bruce County has many regional assets including, the 'STEM Program', the 'Innovation, Creativity and Entrepreneurship (ICE) Program', and the 'Four County Labour Market Partnership Board'. The region can leverage these assets, in addition to the programs and opportunities through regional education organizations, to build a reputation for economic & skilled workforce development.	↑ High
The Spruce the Bruce program was introduced in 2011 to support local community efforts to facilitate long-term revitalization plans. The Business to Bruce Program was introduced in 2016 to support business development, recruitment, and enhancement. As such, Bruce County can leverage these programs to bring together stakeholders, build community capacity to assist with strategic policy and capital investment, and inspire, attract and support business owners and entrepreneurs by engaging the local communities and municipalities.	→ Medium
Weaknesses	Impact
The absence of a local university and private school system, in addition to the limited relationship between industry, local colleges and the public school system has created a gap in the talent pipeline.	↑ High
The Bruce region's current infrastructure - education facilities, transportation, refining cellular & mobile networks, and support organizations (hospitals, grocery stores, restaurants, hotels) - needs to be supported and enhanced in order to attract top talent.	↑ High
Brand awareness - tourism awareness is strong, however, the County itself is not known as a cluster centre or centre of business and entrepreneurial activities.	→ Medium
The region is currently suffering from a lack of collaboration, integration, and diversity in the workforce.	→ Medium
The entrepreneurial culture could be better mobilized, beyond the usual chamber and service club memberships.	→ Medium

Strategy Vision, Mission & Values

The first step in the formulization of a comprehensive business plan is to formulate the mission, vision and values. These elements help to table-set the high-level direction, scope and strategic objectives of the remaining business plan components.



What is a mission statement?

Deloitte defines a mission statement as a formal summary of the aims and values of an organization. It is intended to ensure that everyone in the organization is "on the same page" and to serve as a baseline for effective business planning.

What is a vision statement:

Deloitte defines a vision statement as an aspirational description of what an organization would like to achieve or accomplish in the mid-term or long-term future. It is intended to serves as a clear guide for choosing current and future courses of action.

What's the difference?

A mission is different from a vision in that the former is the cause and the latter is the effect; a mission is something to be accomplished whereas a vision is something to be pursued for that accomplishment

Why are they important?

Together, mission and vision guide strategy development, help communicate the organization's purpose to stakeholders, and inform the goals and objectives set to determine whether the strategy is on track.

 **Business Case**

Business Case Purpose

The Business Case, using insights gained by the MaRS report, Project Innovate, and Deloitte's strategy development tools, will formalize and build the business rationale for undertaking the project and further define the parameters and management factors involved in developing the Bruce Centre of Excellence.

The **Business Case** provides an instrument to **forecast, monitor** and **assess** the **cost and benefits** of the undertaking. It creates the **necessary discipline, provides ongoing control, minimizes the risks** and provides a clear direction.



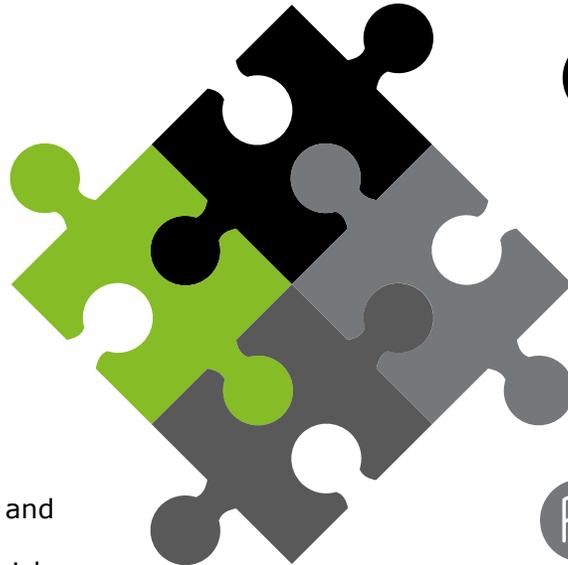
Problem Definition

- Provides management with the key problem being addressed and an outline of the key steps necessary to address the problem
- Gives stakeholders a sense of where the things are headed if projects are implemented



Prioritized Opportunities

- Identifies the opportunities and threats of the project
- Assesses the impact of the risks and rewards associated with the project



Economic Landscape

- Creates a climate for rigorous analysis using economic research
- Calls for consideration of issues upfront
- Reaffirms support and consensus going forward



Stakeholders & Outcomes

- Establishes consensus on key stakeholders and how they are impacted
- Allows for identification of strategic outcomes and benefits from executing the project

Business Case Problem Definition

A Bruce Centre of Excellence would support Bruce County and its surrounding regions in addressing its increasing labour shortage, lack of diversified entrepreneurial activity, and decreasing level of collaboration between industry and education.



Labour

Bruce County currently faces an increasing labour shortage because:

- Bruce Power's Life Extension Program, will require thousands of people for the next 20+ years that the current population of Bruce County can't fulfil
- Since the Economic Development and Innovation partnership was formed, hundred's of new jobs are expected to be created in the nuclear and construction industries

The establishment of the Bruce Centre of Excellence would address the labour shortage by:

- Growing the overall talent pipeline
- Training the current population to develop the necessary experience and skills to be successful in specific job functions or industries



Entrepreneurial Activity

The Bruce region currently faces a lack of diversified entrepreneurial spirit because:

- The absence of a local university and private school system, in addition to the limited relationship between industry, local colleges and the public school system has created a gap in the talent pipeline.
- The region of Bruce has a lack of brand awareness. While tourism can be strong, the County is not known as a centre of business and entrepreneurial activities.

The establishment of the Bruce Centre of Excellence would address the three pillars required to spur entrepreneurial and economic growth:

- Allocate resources to research & innovation
- Grow and develop a talent pool
- Incubate business innovation



Collaboration

The region of Bruce has experienced a decreasing level of collaboration because:

- There is currently no recognized Regional Innovation Centre (RIC) in mid-Western Ontario and no energy specific RIC in Ontario
- There are no active mentorship programs or shared services platforms

The establishment of the Bruce Centre of Excellence would improve collaboration opportunities by:

- Creating stronger connections with the education system by providing opportunities for students to become more engaged in the workforce
- Building networks for partnerships with business, government, associations and other key stakeholders

Business Case Economic Landscape

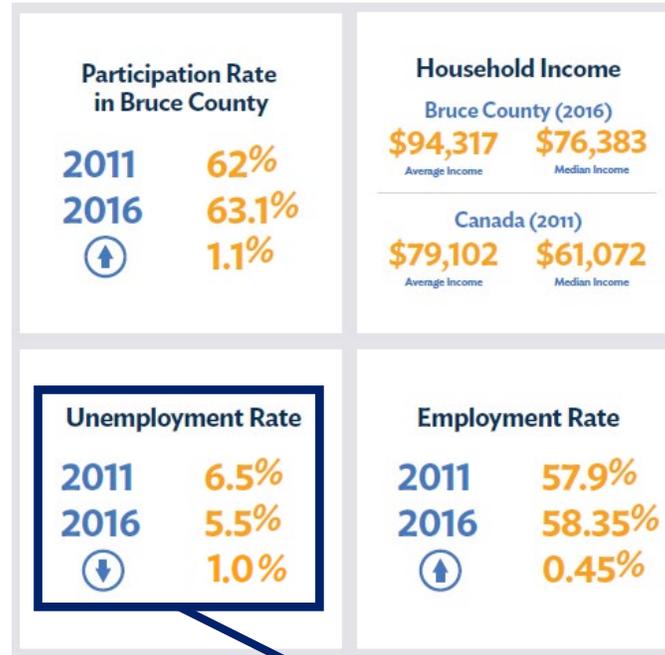
As a region of energy excellence, with a growing population and an improving labour force, Bruce County represents a major opportunity to advance emerging technologies, build an environmentally and energy focused innovation cluster and utilize existing assets to diversify into alternative industries.

Geography



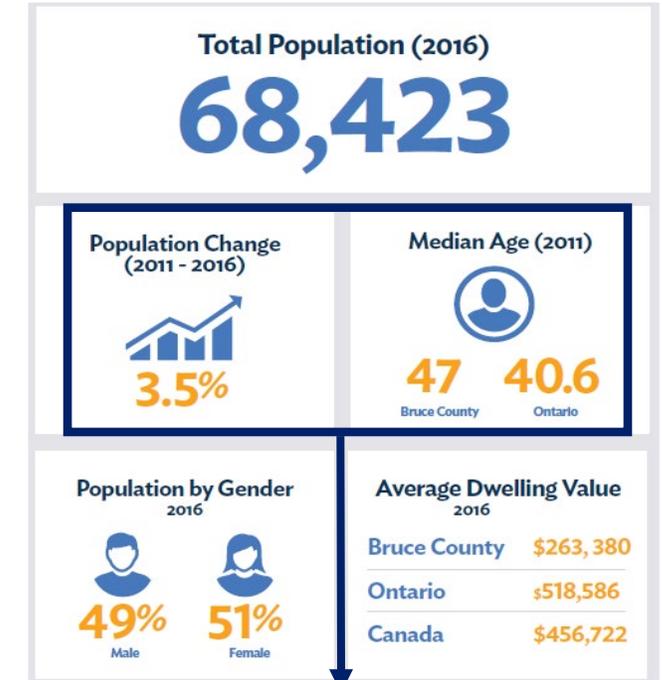
The Bruce region is known for its magnificent views, rock formations, hiking trails, and beaches, appealing to a diverse market with strengths in **tourism, agriculture and energy.**

Labour Force



Bruce County's **unemployment rate** improved from 2011 to 2016 and with the recent formation of the Business to Bruce Program and the Life Extension Program, this **trend is expected to continue** going forward.

Demographics



Despite an increase in the population from 2011-2016, the average age in Bruce County is significantly older than the rest of Ontario, indicating an aging population that needs a youthful injection for **sustainable growth.**

Business Case Prioritized Opportunities

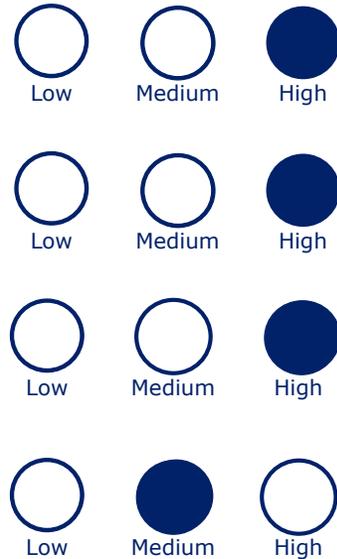
With several opportunities and threats facing Bruce County, it is vital to prioritize them based on their potential impacts and likelihood of occurring so that an effective action plan, contingency plan and/or mitigation plan can be properly planned and developed.

<p>Prioritization Score</p> <ul style="list-style-type: none"> All identified opportunities and threats are scored across impact and probability  	<p>Impact</p> <ul style="list-style-type: none"> Where, how severe, and who is impacted if this opportunity or threat is realized?  	<p>Probability</p> <ul style="list-style-type: none"> What is the likelihood that this opportunity or threat will occur?
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Opportunities

- Bruce Power’s multi-year, multi-billion dollar Life Extension Program, announced in 2015, will require thousands of people each year for the next 20 years and beyond.
- Community involvement and local government support has been strong thus far, and is expected to continue to be available going forward.
- ‘Project Innovate,’ Bruce County’s regional innovation strategy has recently kicked off and one of its key priority initiatives is to help with the establishment and continual operation of the Bruce Centre of Excellence.
- There are successful frameworks from past innovation strategy facilities and programs that have addressed the current challenges faced by Bruce County including the need for innovation, collaboration and talent integration.

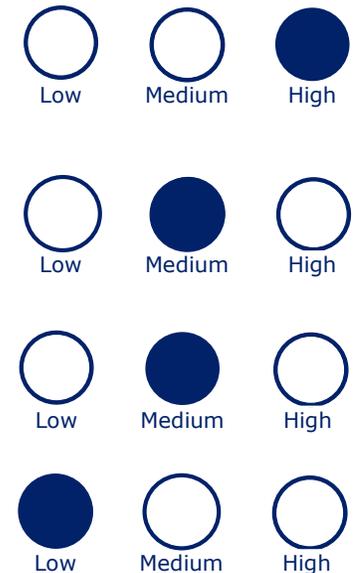
Prioritization Score



Threats

- Bruce Power is currently the anchor for the Bruce County region, and should an unforeseen event affect Bruce Power, Bruce County’s reliance on Bruce Power would severely affect the innovation strategy going forward.
- Bruce County is surrounded by several other regions who could pose as competition for potential investments towards infrastructure, labour and talent based movements.
- The distances between significant populations of the segments most likely to set up businesses is substantial as it creates many strong business location choices.
- An aging population presents a significant challenge for the Bruce County region as the demand for technological advancement and skills continues to rise, the supply of labour is not growing at the same pace.

Prioritization Score



Business Case Stakeholder Analysis

Increased access to skilled workforce, improved integration and collaboration opportunities, and positive economic development are a few of the many impactful benefits that would be shared amongst the key stakeholders directly involved with the development of the Bruce Centre of Excellence.

	What are their needs?	How will they be impacted?
<p>Academic Institutions University, College, High School, and grade Schools across Ontario and Canada</p>	<ul style="list-style-type: none"> → Attract ambitious, high-caliber students → Collaboration and knowledge exchange with industry → Local opportunities for students and new graduates → Community with risk-taking culture that seeks to cultivate the next generation of entrepreneurs and innovations 	<ul style="list-style-type: none"> → Enhanced ability to attract the best and the brightest → Dynamic local labour markets that provide opportunities for students and graduates → Local network of accomplished entrepreneurs and venture capitalists who can provide opportunities, mentorship, and support
<p>Small-to-Medium Enterprises Independent businesses that employ fewer than 500 employees</p>	<ul style="list-style-type: none"> → Financial support and access to resources as they grow → Close proximity to other SMEs → Access to capital, talent, and affordable / flexible working spaces → Connections with larger, more established enterprises 	<ul style="list-style-type: none"> → Increased financial support from angel investors / venture capitals → Increased availability of space and support (e.g., funds, programming) → Flexible and affordable spaces to innovate and build/test products → Cross-pollination opportunities with industry leaders and entrepreneurs
<p>Large Enterprises Independent or subsidiary businesses that employ more than 500 employees</p>	<ul style="list-style-type: none"> → Financial support and opportunities to build strategic partnerships → Exposure to leading edge and disruptive innovation → Collaboration and cross-pollination with entrepreneurs and SMEs → Access to top talent, new markets, and consumers 	<ul style="list-style-type: none"> → Increased financial support from angel investors / venture capitals → Ability to integrate into growing innovation ecosystem → Exposure to, and opportunities to collaborate with, entrepreneurs and SMEs → Access to top talent and innovative thinking → Ability to serve as mentors and potential investors / business partners
<p>Government Institutions Municipal, Provincial, and Federal organizations</p>	<ul style="list-style-type: none"> → Align with 'Developers' on infrastructure opportunities → Enhanced local, national, and international profile → Compile and maintain key economic data → Drive economic growth in Bruce County area 	<ul style="list-style-type: none"> → Can be advocates for the removal of legislative obstacles to training programs and infrastructure demands → Help build awareness of programs and by gathering testimony for employers/employees utilizing the programs and services
<p>Underrepresented Workforce Including women, indigenous communities, young entrepreneurs</p>	<ul style="list-style-type: none"> → Opportunities for business and community mentorship → A resource for individuals to find opportunities that match their skillset → Support services for women and young entrepreneurs 	<ul style="list-style-type: none"> → Increased access to jobs, space, opportunities and support → Exposure to, and opportunities to collaborate with, entrepreneurs and SMEs
<p>Unions The Power Workers' Union, The Society of Energy Professionals, CUPE, EPSCA, etc.</p>	<ul style="list-style-type: none"> → Continual training and education for their members → Advance partnerships with and collaboration with other organizations → Access to peers and coaches who have gone through similar processes → Space and support to develop and grow ideas 	<ul style="list-style-type: none"> → Increased availability of space and support (e.g., funds, programming) → Access to work space, coaching, and a network of like-minded workers at large enterprises → Ability to stay in the Bruce County region as they become successful and grow
<p>Community Service and Business Organizations Partnerships with existing networks</p>	<ul style="list-style-type: none"> → Jobs and prosperity for residents through economic development → Deliberate acceptance programs & new comer → Supporting families and community members moving/staying in the area → Strong, balanced economy that can withstand market changes 	<ul style="list-style-type: none"> → Positive economic development and growth → Home base for high-growth businesses → Foreign investment, job creation, tax revenue, and improved infrastructure

Business Case Outcomes

The Bruce Centre of Excellence will produce a number of benefits, and is closely aligned to key regional priorities that were developed as part of 'Project Innovate,' Bruce County's regional innovation strategy.

Highlights	
 Economic Development	<ul style="list-style-type: none"> → The Bruce Centre of Excellence opportunity is in its infancy and has huge growth potential as there is currently no recognized 'Regional Innovation Centre' (RIC) located in mid-Western Ontario and no energy specific RIC in Ontario → The Bruce Power and Bruce County multi-year partnership that attracts business investment and expansion into local region has created an energy cluster of intellectual talent. → Bruce Power's multi-year, multi-billion dollar Life Extension Program, announced in 2015, will require thousands of people each year for the next 20 years and beyond.
 Talent	<ul style="list-style-type: none"> → Reinforce the local region as global destination for top talent and create world-class jobs for Canadians → Attract new, top talent from around the world and benefit from their connections and experiences → Retain graduates from top Canadian academic institutions who might otherwise look elsewhere → Retain and leverage existing talent previously brought to the region → Facilitate better flow of labour between Bruce County and other regions in Ontario and Canada
 Infrastructure	<ul style="list-style-type: none"> → Expand availability of flexible space within the Bruce region to retain existing firms, attract new firms, and offer more startup mentoring and peer-to-peer networking → Create stepping stones for small businesses, providing a full pathway solution to becoming large enterprises → Create space and opportunity for deliberate cross-pollination and accidental collisions.
 Reputation	<ul style="list-style-type: none"> → Build on the Bruce region's existing reputation as a skilled workforce development and energy hub → Establish the Bruce region as the global energy leader → Leverage current corporate relationships to attract additional multinational corporations to establish new operations or move existing operations → The Bruce region has a strong reputation in the energy sector, which will allow the area to build a culture and support system that will nurture entrepreneurial spin offs.
 Ecosystem	<ul style="list-style-type: none"> → Grow and strengthen the existing domestic ecosystem through an injection of expertise → Scale home-grown innovation across industries and geographies → Create more opportunities for cross-pollination and collaborative problem solving → Expand existing energy cluster → Create high-density pockets of employment

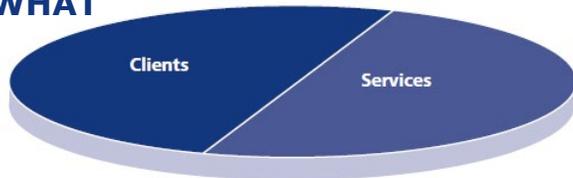
Regional Priority Alignment
<p>Increase Economic Diversity Create a diverse economy that is sustainable over the long-term and can respond to challenges and opportunities</p>
<p>Grow, Attract and Retain Talent Locally Have an inclusive and robust talent pipeline - that attracts, develops & retains top talent in the region of Bruce County</p>
<p>Improved Infrastructure Ensure the regional infrastructure and lifestyle enables the goals with regards to public transportation, high-speed internet, education facilities and general standard of living</p>
<p>Shift in Cultural Mindset Foster an innovative and inclusive local mindset to support integration of community members and improve the standard of living in Bruce County</p>
<p>Anchor Collaboration Promote and enable diversity and collaboration between industry, government, & academia partners</p>

Operating Model

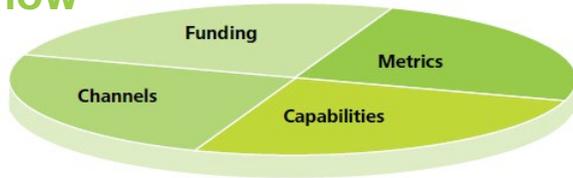
Operating Model Overview

An operating model is defined as the set of capabilities required to support the organization’s business model and the configuration of those capabilities into specific units or functions.

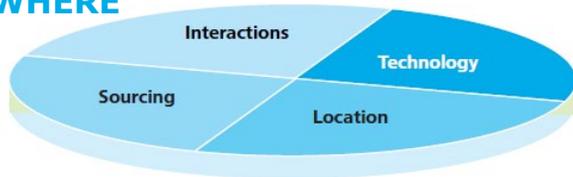
WHAT



HOW



WHERE



WHO



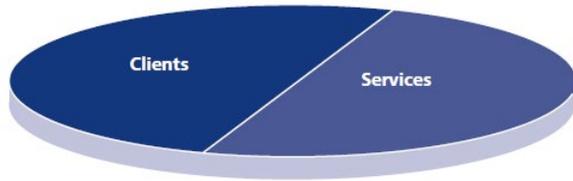
Definitions

- **Services** refers to the scope of services that the organization will provide to clients.
- **Clients** refers to the scope and reach of the organization, providing a view of the end-state 'clients' that services will be provided to.
- **Funding** refers to the mechanisms through which the services are paid for, whether that be on a pay-per-service basis or as an overall overhead cost.
- **Capabilities** refers to the skills and experience that the organization will need to have access to in order to deliver the agreed services to clients.
- **Channels** refers to the methods through which the organization will communicate with their clients.
- **Metrics** refers to the reporting of calculated measures at both operational and strategic levels, to demonstrate the overall performance of the organization.
- **Interactions** refers to the mechanisms through which clients will engage with the organization, ranging from simple service desk interactions, through to major investment requests.
- **Technology** defines the systems and tools that the organization requires to be able to effectively deliver the agreed set of services.
- **Sourcing** refers to the strategy by which all capabilities and services will be sourced, taking into account the mix of insourcing and outsourcing options available in the wider market.
- **Location** defines the geographical locations from which the organization will deliver services.
- **Roles & Responsibilities** defines the specific remit and scope of each work stream of the organizational model.
- **Organizational Structure** refers to the overall structure of the organization and associated elements, detailing the key work streams and core capabilities of each.
- **Governance** refers to the structures and forums through which the organization provides oversight and control over technology services and capabilities.

An organization’s operating model serves as the basis for its design and structure. Operating model decisions drive organization and job design activities.

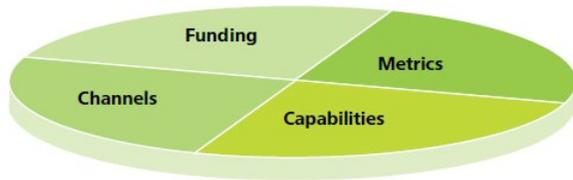
Operating Model Case Study #1

Invest Ottawa illustrates a successful framework on how a non-profit organization can leverage its geographical region, economy, community network, and public/private support to spur entrepreneurial spirit, job growth, innovation and talent attraction.



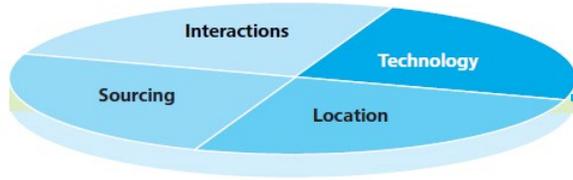
WHAT

Invest Ottawa is a non-profit organization that facilitates economic growth and job creation in the city of Ottawa. Invest Ottawa accomplishes this by giving entrepreneurs access to resources and coaches to help them start and grow their businesses; by promoting Ottawa’s diversified economy and high quality of life to attract companies to set up shop and generate jobs; and by delivering programs and initiatives that increase entrepreneurial momentum. In short, Invest Ottawa is an economic development agency that delivers collaborative economic development programs and initiatives aimed at increasing entrepreneurial momentum, jobs and growth in the city of Ottawa.



HOW

Invest Ottawa is government run and is actively working to encourage internet of things (IoT) innovation in the Ottawa area, and promote Ottawa as an ideal location for entrepreneurs and start-ups to thrive and scale. Invest Ottawa’s accelerator program implements the best-proven practices from incubators and accelerators around the world. In a phased and milestone-based approach, founders push themselves over twelve to eighteen months to create a scalable and globally competitive technology company.



WHERE

Beyond attracting capital investment, Invest Ottawa will help to attract top talent to the Ottawa region, and create new jobs. Spurring IoT innovation will also help to establish Ottawa, and Canada, as players on the global IoT scene. Although a large percentage of its clients focus on technology, Invest Ottawa provides resources and mentorship to all businesses.



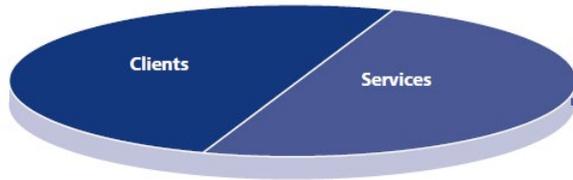
WHO

Invest Ottawa is a non-profit organization that serves as the lead economic development agency for the city. All of Invest Ottawa’s services are made possible by generous support from its municipal, provincial, federal and private partners. The private sector is involved with Invest Ottawa in many ways: first, as clients of the organization and, second, as advisors through the Invest Ottawa Board of Directors and its working groups. As a non-profit, Invest Ottawa does not provide any funding to businesses, however, it can help businesses access government grants, secure loans and connect you to angel investors and venture capitalists.

Operating Model Case Study #2

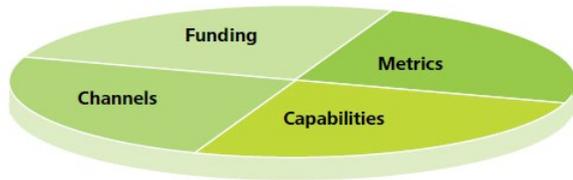
Communitech, a Kitchener-Waterloo based micro-ecosystem for innovation, incubation and commercialization, represents a successful framework on how to leverage network and community support, academia and available infrastructure to support the development of companies (at all stages), with access to capital, customers and talent.

COMMUNITTECH



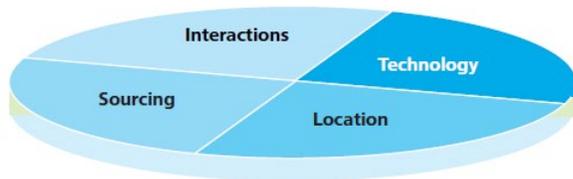
WHAT

Communitech was founded in 1997 by a group of entrepreneurs committed to making the Kitchener-Waterloo region a global innovation leader. Communitech helps corporations engage with startups, develop new products quickly, foster a culture of innovation, and attract and retain the best talent. In return, they make the Waterloo Region stronger by being marquee customers, investors and partners to local companies, bringing a global perspective and name recognition to their ecosystem.



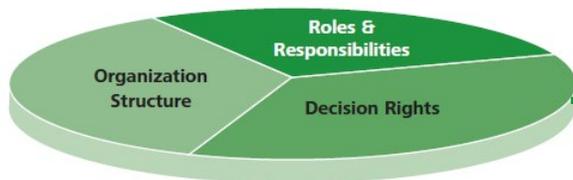
HOW

Communitech has built a micro-ecosystem for innovation, incubation and commercialization of start up ideas by facilitating training for skilled labour to keep up with demand and by creating an ecosystem of helping companies at all stages with access to capital, customers, and talent. Communitech's financial sustainability model allows it to leverage corporate partnerships in order to help them continue to deliver high-quality programs and events across the board.



WHERE

The Communitech Hub has created an "Innovation District", by attracting 65 new companies to the downtown Kitchener, Ontario area. Since 2010, 863 new startup companies have been created and 1,600 new startup jobs have been generated. In total, close to 4,000 new jobs have been created in existing tech firms and companies have attracted \$350 million in equity investments.

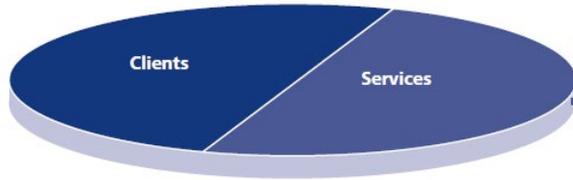


WHO

Communitech operates on a public-private partnership funding model. Their private contributions are matched by investments from the Government of Canada, the Province of Ontario, and the cities of Kitchener and Waterloo. Communitech supports a community of more than 1,400 companies — from startups to scale-ups to large global players.

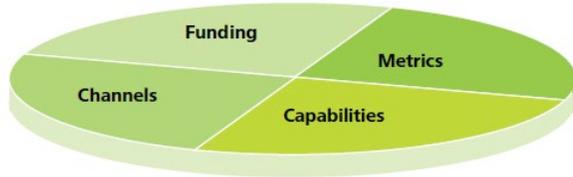
Operating Model Case Study #3

Alabama Industrial Development Training (AIDT), established with the mandate to provide quality workforce development opportunities by helping to connect its citizens with local businesses, provides an effective model on how to co-create training content to provide pre-employment and on-the-job training programs to connect a skilled workforce with new and existing industries.



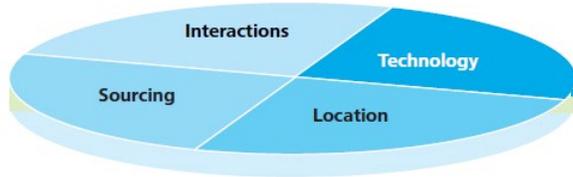
WHAT

AIDT was established in 1970 as a contract program reporting to the State Board of Education through the Department of Education. The Mission of AIDT is to provide quality workforce development for Alabama's new and expanding businesses, and to expand the opportunities of its citizens through the jobs these businesses create. AIDT has provided thousands of skilled, motivated employees to Alabama industries since 1971.



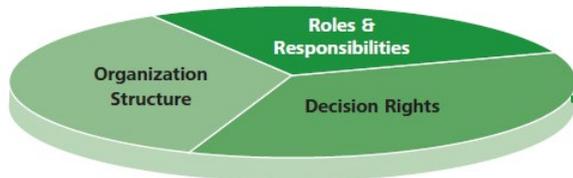
HOW

AIDT was established to build a healthy state economy by recruiting and training a skilled workforce to attract new industries to the state and to expand existing industries. Job-specific pre-employment and on-the-job training programs are provided at the Alabama Workforce Training Centre (AWTC). The program provides a full range of customized technical training programs that are offered at no cost to employers and to the trainees. Leadership training programs are also available. In addition to training, AIDT offers trainee recruitment and screening, safety assistance, industrial maintenance assessments and improvement/process assessments.



WHERE

AIDT operates in a 56,000 square foot facility named AWTC and is located in Birmingham, AL. The AWTC is operated by AIDT in partnership with several entities including the Birmingham Business Alliance, private manufacturing and construction companies, community colleges, The Alabama Technology Network and the State Department of Education. Training is conducted by staff or contracted instructors and delivered through classrooms or Mobile Training Units (MTUs) customized to meet specific company needs. MTUs go directly to the employer site to provide classroom and hands-on training.

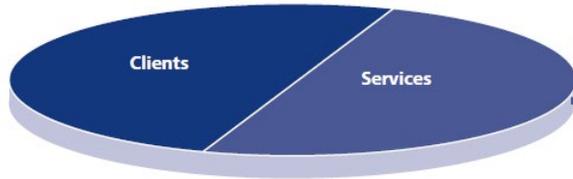


WHO

There is no legislation specifically creating or managing AIDT. It exists through annual line item funding in the Education Trust Fund budget. In 2012, AIDT became a division of the Alabama Department of Commerce, where decisions are made that guide AIDT and its structure.

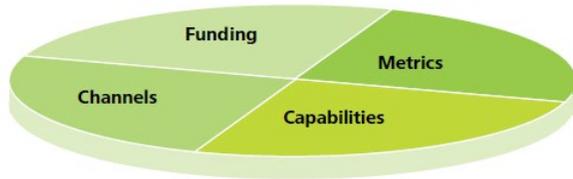
Operating Model Case Study #4

Supercom is a contracting and training joint venture run by six First Nation communities across whose traditional land the power line upgrading project will cross. The mandate shows how to maximize community involvement in projects with multi-national organizations by supplying skilled labour, negotiating service and supply contracts, and cultivating business partnerships.



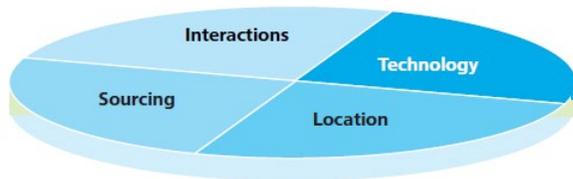
WHAT

The East-West Tie Transmission Project was identified as a top five priority transmission projects by the Ontario Power Authority to provide a reliable and cost-effective long-term electricity supply to northwestern Ontario. Industrial activities in the Northwest, particularly in the mining sector, are expected to drive strong electricity demand growth in the coming decade. SuperCom, a group of six Indigenous communities (Fort William First Nation, Red Rock Indian Band, Pays Plat, Pic River, Pic Mobert and Michipicoten) in the project area, identified a need for education and skills training to respond to the opportunities presented by development and operation of the transmission line.



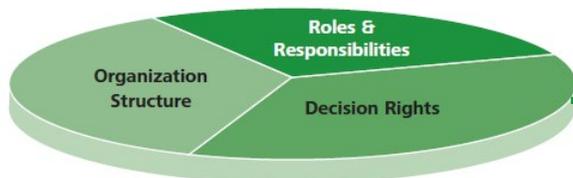
HOW

A regional training strategy, developed in partnership with the SuperCom project team and Confederation College, was developed to identify an innovative and collaborative model for education, skills training and employment; outline a collaborative approach between the SuperCom Project Team and the strategy partners; and guides activities and outline additional information required to move forward with project development and implementation.



WHERE

Through Confederation's relationship with Apple Canada, technology (i.e. use of iPads) can be incorporated to connect with participants, to conduct surveys and to incorporate evaluative tools. Use of technology allows participants and the project to be monitored through all activities and phases of the project. Working with the project evaluator, the College and SuperCom develop results-based indicators tied to project objectives. Summative indicators such as # of participants trained, # graduates, # work placements completed, # employed, # continuing to education are incorporated and reported on. Other indicators, such as access to training, increased educational attainment, client/employer satisfaction will be developed and implemented in collaboration with the evaluator.



WHO

Confederation College and SuperCom use a community-based approach, working closely with the six communities to guide an education and skills training process to engage SuperCom community members in skills training, which leads to sustainable employment opportunities. A third-party evaluator is contracted to oversee development and implementation of the evaluation component of the project in collaboration with the College and SuperCom. Proposed evaluations includes both a year-by-year formative and end-of-project final impact evaluations.

Operating Model Stakeholder Interviews

Through one on one interviews, with over twenty stakeholders, consensus on the 13 key elements of a successful operating model was established.

What?

Services

- Training / education – future is in digital (virtual reality) vs. bricks, tools, in-class
- Information sessions – to connect businesses with potential workers and students with job board postings and ‘meet & greets’
- “Collision events” – between small and large companies for key supports
 - Large companies can offer access to customers and customer channels, both online and offline
- Support and integration services – marketing, accounting, financing, mentorship programs to be shared amongst businesses
 - Provide access to latest programs, equipment and basic materials – apprenticeship programs, AI, 3D printers, robotics, etc.

Customers

- High school, University, and College students
- Entrepreneurs, employees of small-medium businesses who lack the resources available at larger companies
- Employees of large companies willing to add apprenticeship programs
- Unions and union representatives
- Government and political institution representatives
- Indigenous community members
- The target is in the people that will be trained & re-skilled - not the businesses themselves.

How?

Funding

- Sponsorship from both public and private businesses (of all sizes), including SME’s and entrepreneurs
- Membership fees – charge for services the Centre will offer including training classes and guidance counseling
- Public support from government (all three levels)
- Require a taskforce or fundraising committee of full time employees or volunteers to discover funding and revenue streams

Capabilities

- Diverse and experienced Board of Directors and leadership team
- Strong day-to-day service, with qualified and committed professionals/teachers

Channels

- Online channel – including an online portal & website
- In-person channel - on premise office space for training and access to guidance counsellors/support staff
 - Flexible working hours with open-door policy

Metrics

- # of jobs created, # of courses completed, # of new business/patents, # of public/private partnerships/sponsors, % of unemployment rate

Operating Model Stakeholder Interviews

Through one on one interviews, with over twenty stakeholders, consensus on the 13 key elements of a successful operating model was established.

Where?

Location

- The location of the Centre must be located conveniently to serve all neighboring communities at one of the potential sites, which are primed and ready for build
- The Centre must support both businesses and people of surrounding communities to promote collaboration

Sourcing

- Vital to have flexible service hours (similar to restaurant hours) - training sessions, job fairs and career counselling needs to be offered during but also outside standard working hours
- Implement face-to-face and digital pathways for communication

Interactions

- Online platform – must create a website and app to allow for accessible interaction between stakeholders
- In-person office – physical space to facilitate live interaction between each stakeholder group
- Government funding is key – so must interact and align with government mandates and priorities

Technology

- Potential to include virtual reality within training
- Robust technology for conferencing, meeting and teaching
- It is still early on in process to determine which technology resources, but important to implement advanced technological capabilities from the onset

Who?

Decision Rights

- Board of Directors in place to make key overarching decisions
- Imperative to have representatives from each stakeholder group on the Board of Directors and on leadership team

Organization Structure

- 50/50 public/private partnership model
 - Support is required from all stakeholders: government, businesses, academia, entrepreneurs, etc.
- Not for profit - “lean & mean” organization structure
 - With a lack of excessive funding, especially in the early stages, important for leadership to run a lean organization, only spending money when necessary

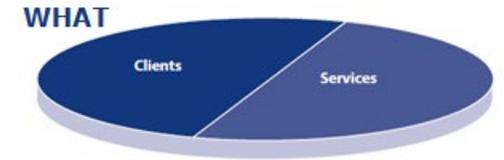
Roles and Responsibilities

- Executive Director to make day-to-day decisions
 - This should be a young, vibrant leader, someone with charisma
- Despite different departments/elements, need to ensure the message is a ‘one-stop shop’ for both business incubation/acceleration and skilled workforce development
- Advisory Committee – to work and align goals with Regional Innovation Taskforce
- Managers should be required to oversee the key specific service offerings and manage specific client groups

Operating Model Services & Clients

Establishing the client base and the service offerings provide the basis for the operating model and set the framework for the subsequent components to build upon.

- **Services** refers to the scope of services that the organization will provide to clients.
- **Clients** refers to the scope and reach of the organization, providing a view of the end-state 'clients' that services will be provided to.



Services

What specific services will be offered?

Talent Development

Training

Classroom and virtual training for job-specific pre-employment and on-the-job training programs

Talent Platform

Portal for stakeholders to interact, perform online training tutorials, and stay up to date on job opportunities and corporate events

Career Services

Networking opportunities for businesses and prospective employees/students to interact and one-on-one guidance to help people to make career, educational, and life decisions

Business Incubation & Acceleration

Mentorship Services

Program for people to obtain educational, financial, and network support from their peers

'Collision' Events

Facilitate events to promote sharing of best practices on innovation, finance, and market delivery

Support & Integration Services

Enable the business community to help reduce cost through economies of scale and standardized support and processes

Although there are different service offerings in both pillars, the two will intersect through shared space, technology, and governance.



Clients

What clients will the services be provided to?

Academic Institutions

University, College, High School, and grade Schools across Ontario and Canada

Small-to-Medium Enterprises

Independent businesses that employ fewer than 500 employees

Large Enterprises

Independent or subsidiary businesses that employ more than 500 employees

Underrepresented Workforce

Including women, indigenous communities, young entrepreneurs

Unions

The Power Workers' Union, The Society of Energy Professionals, CUPE, EPSCA, etc.

Community Service and Business Organizations

Partnerships with existing networks

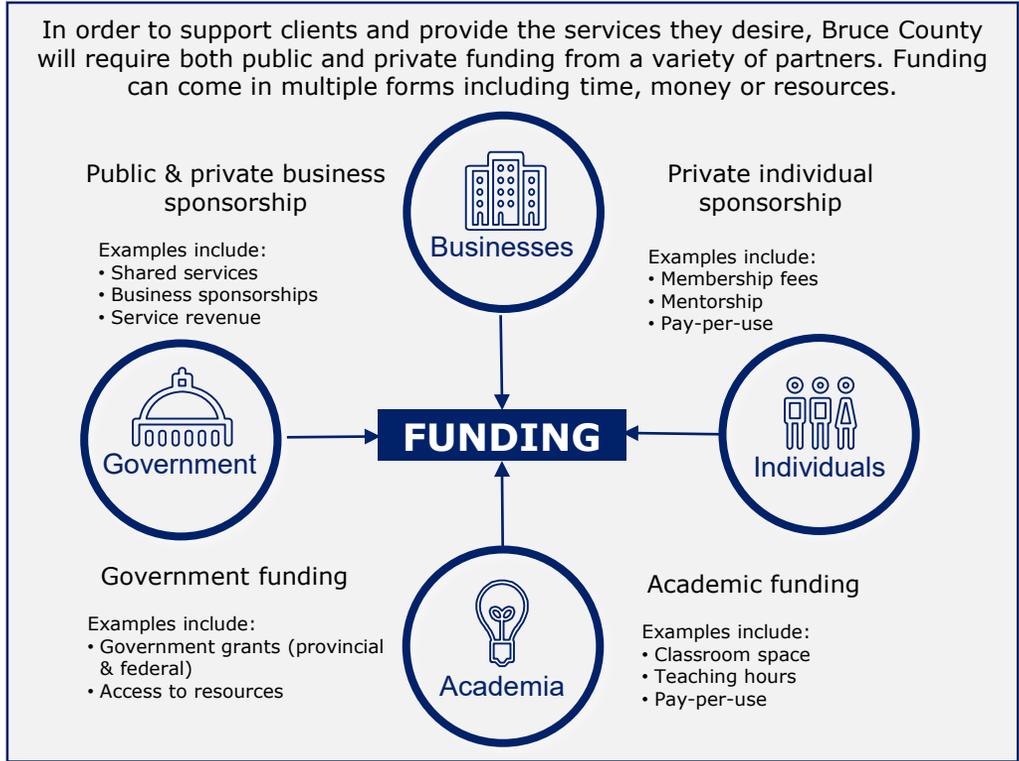
Operating Model Funding & Capabilities

Through a public and private funding model, the Bruce Centre of Excellence will leverage service revenue, government grants, and sponsorship from businesses, individuals and academia to support the skills and experience required to provide the services to its clients.

- **Funding** refers to the mechanisms through which the services are paid for, whether that be on a pay-per-service basis or as an overall overhead cost.
- **Capabilities** refers to the skills and experience that the organization will need to have access to in order to deliver the agreed services to clients.

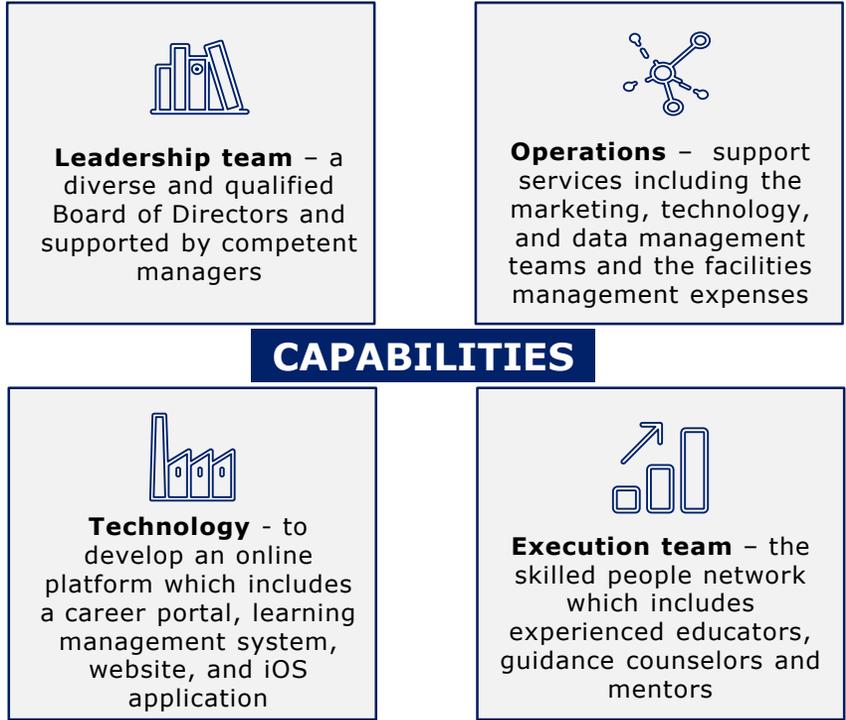


Where will the funding come from?



The funding will be used to build specific capabilities in order to deliver the services to clients.

Where will the funding be used?



Operating Model Channels & Metrics

The Bruce Centre of Excellence will leverage several layers and channels to communicate with clients. Through these pathways, performance will be measured by maintaining a financial and operational record of specified metrics, chosen precisely to manage success.

- **Channels** refers to the methods through which the organization will communicate with their clients.
- **Metrics** refers to the reporting of calculated measures at both operational and strategic levels, to demonstrate the overall performance of the organization.

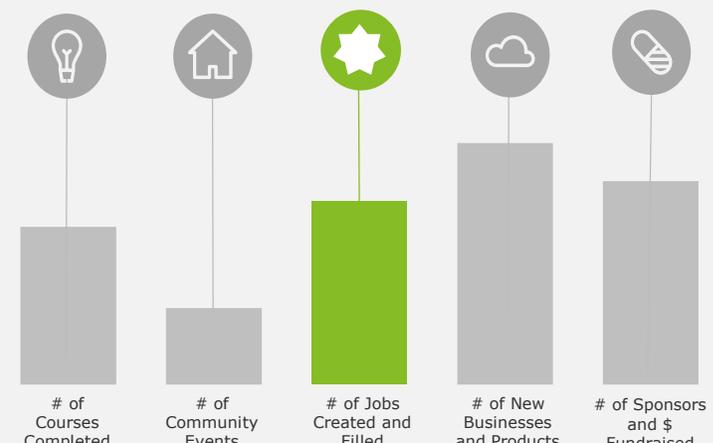


What channels will be used to communicate and reach our clients?

How will we measure & manage success of our services?

<p>Social Media</p> <ul style="list-style-type: none"> • Connect with members through website, app and social media - allows businesses, students and other stakeholders to interact online. 	<p>Search Engine Optimization</p> <ul style="list-style-type: none"> • Leverage data from SEO companies to target specific clients by marketing services most relevant to their online tendencies.
<p>Print & Digital Advertising</p> <ul style="list-style-type: none"> • Use physically printed media, such as magazines and newspapers, to reach clients - also use digital media, such as banner ads, mobile advertising, or television commercials. 	<p>Job Fairs / Information Sessions</p> <ul style="list-style-type: none"> • Host or have a presence at job fairs or information sessions where employers, recruiters, and schools interact and give information to potential employees – what the program entails, what the workload requirements are, and all the other prerequisites.
<p>Referral Marketing</p> <ul style="list-style-type: none"> • Promote services to new customers through individual referrals (word of mouth) - businesses can influence this through incentive strategies as well. 	<p>Email Blasts</p> <ul style="list-style-type: none"> • Partner with academic institutes and businesses to circulate emails to students and employees with information on the service offerings.

Key Metrics to Measure and Manage Success

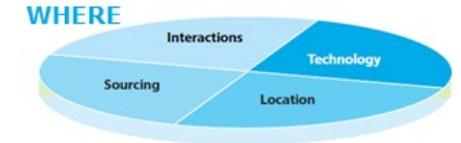


- To create a sustainable competitive advantage, it is important to track performance of the Bruce Centre of Excellence using key metrics.
- Please note that these are just a few examples of potential metrics that can be used to track performance.

Operating Model Interactions, Technology, Sourcing, & Location

To effectively reach our clients and meet the identified metrics, specific interaction and technology requirements will be essential to execute the service offerings and where they will be delivered.

- **Interactions** refers to the mechanisms through which clients will engage with the organization, ranging from service desk interactions to major investment requests.
- **Technology** defines the systems and tools that the organization requires to be able to effectively deliver the agreed set of services.
- **Sourcing** refers to the strategy by which capabilities and services will be sourced, taking into account the mix of insourcing/outsourcing options available in the market.
- **Location** defines the geographical locations from which the organization will deliver services.



Interactions

How will clients engage with us?

Online (self serve) - current and prospective clients can engage through the online platform and a central customer service email inbox

One-on-one – through a customer service help-desk and phone hot-line, customers can obtain answers for their questions through one-on-one interaction

Group networking & collaboration – clients can engage through training development during scheduled appointments, information sessions, job fairs or 'collision' events

Technology

What technology is required to deliver the services?

Online training capabilities through a learning platform to facilitate remote training services and personalized training development

State-of-the-art website and iOS application to direct social media advertising and other online marketing strategies, enabling interaction with clients

LEED platinum building design with smart technology, compatible with all laptops, computers and smartphones, to support conferencing, meetings and trainings

Sourcing

How will we execute the services?

Recruit skilled teachers, guidance counselors, mentors and other paraprofessionals to enable the service offerings

Partner with a learning management system software and service compatible with the online platform to allow for remote learning and personalized trainings

Outsource training opportunities to industry specialists to perform learning development and services on-site but also at off-site locations

Location

Where will the services be delivered?

The Bruce Centre of Excellence location will be located conveniently to serve all neighboring communities at one of the potential sites, which are primed and ready for build

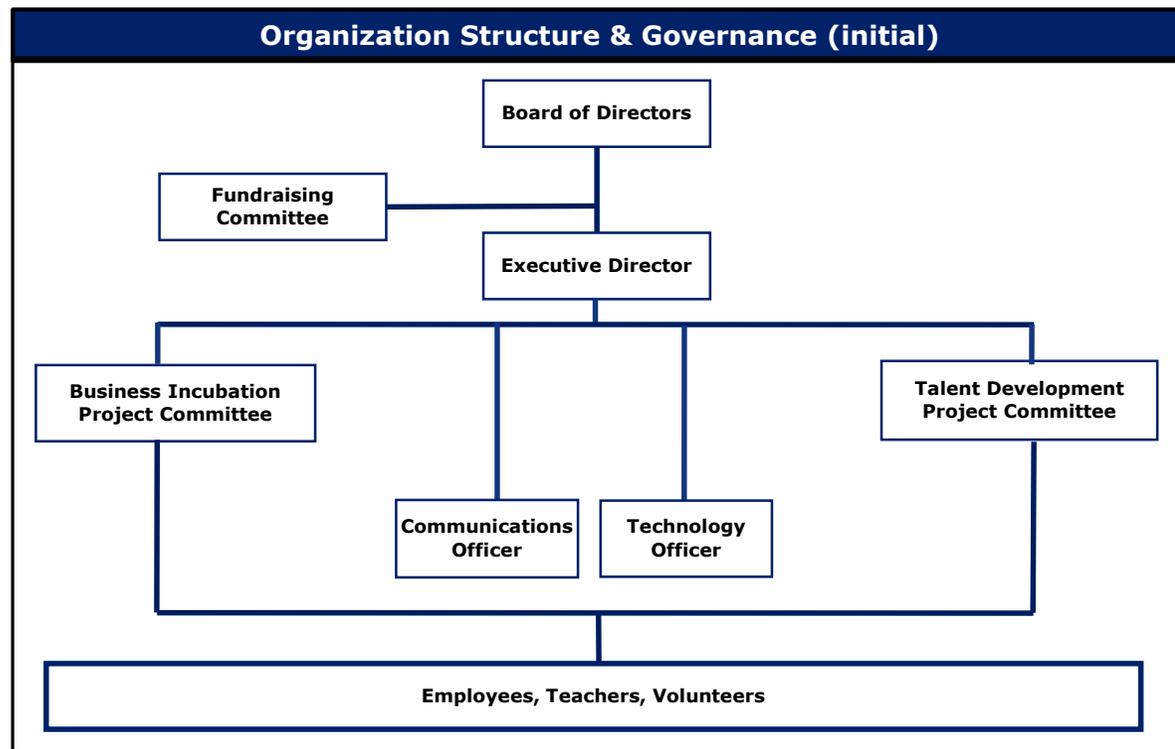
Specific services will be available through an online platform, to enable digital interaction and remote learning

Partner with surrounding communities to build network, lend office space & share support services in neighbouring communities

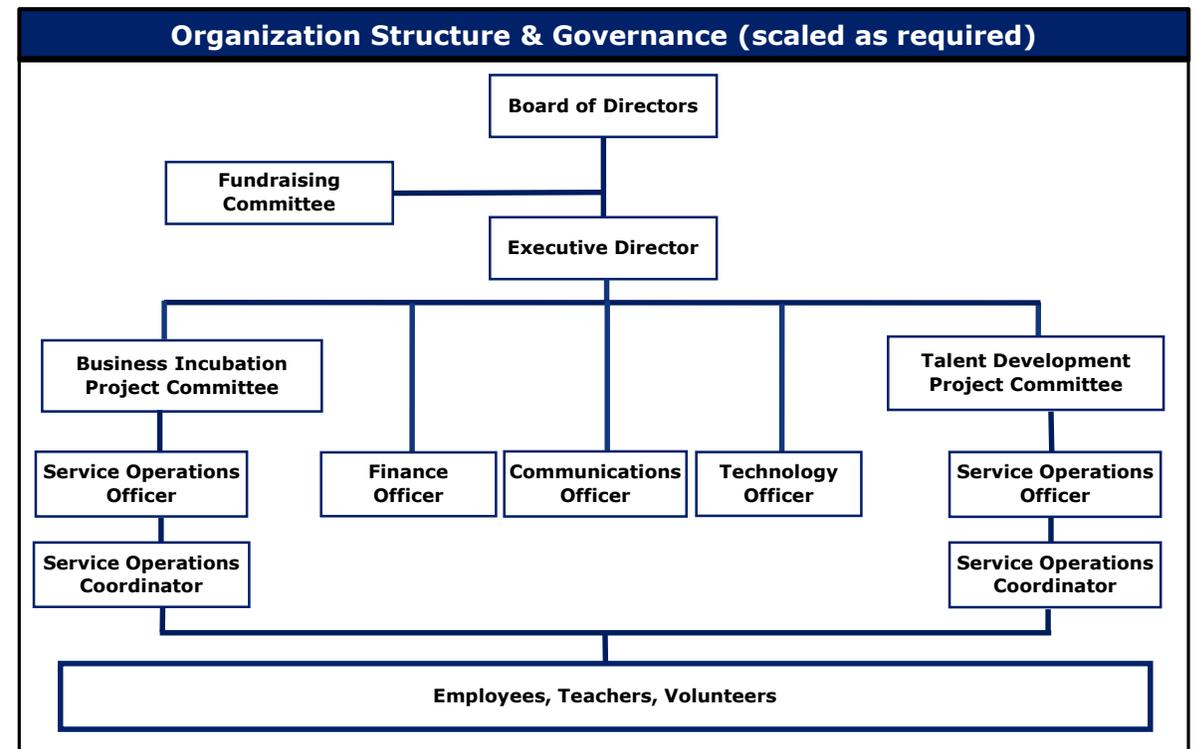
Operating Model Organizational Structure & Governance

The governing body for the Bruce Centre of Excellence will follow a top-down approach, with the Board of Directors establishing and supervising the key strategic initiatives, the Executive Director managing day-to-day operations and Officers handling specific division tasks.

- **Organizational Structure** refers to the overall structure of the organization and associated elements, detailing the key work streams and core capabilities of each.
- **Governance** refers to the structures and forums through which the organization provides oversight and control over technology services and capabilities.



An illustrative example of the initial org. structure required as the Bruce Centre of Excellence is launched.



An illustrative example of the org. structure required as the Bruce Centre of Excellence is scaled.

Operating Model Roles & Responsibilities

The governing body for the Bruce Centre of Excellence will follow a top-down approach, with the Board of Directors establishing and supervising the key strategic initiatives, the Executive Director managing day-to-day operations and Non-Executive Directors handling specific division tasks.

• **Roles & Responsibilities** defines the specific remit and scope of each work stream of the organizational model.

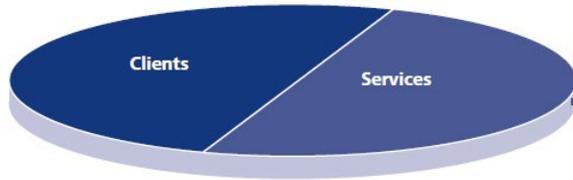


Role	Responsibilities
Board of Directors	<ul style="list-style-type: none"> Hire/support/evaluate/discharge Executive Director Review and approve annual budget Review and approve major organizational decisions, commitments, and plans including expenditures and leases Evaluate progress toward program and financial goals Ensure the continuity of the organization through development and recruitment of executive staff In conjunction with executive staff, provide leadership on organizational transition, structure and planning
Fundraising Committee	<ul style="list-style-type: none"> Search out and obtain fundraising from various private and public partners Ensure there's a specific fundraising target Ensure prospect research occurs to identify how much money might be raised from different types of resources Identify specific, potential sources of funds from a diverse mix of sources Ensure effective administrative systems to track grants and donations
Executive Director	<ul style="list-style-type: none"> Lead the development of the organization's short- and long-term strategy Evaluate the work of other executive leaders within the company Maintain awareness of the competitive market landscape, expansion opportunities, industry developments, etc. Ensure that the organization maintains high social responsibility Assess risks to the organization and ensure they are monitored and minimized
Project Committees	<ul style="list-style-type: none"> Oversee the divisions of each individual service line pillar Guide the officers and coordinators to ensure alignment with overall strategic goals of the Centre Vote on and then implement all day-to-day strategic decisions

Role	Responsibilities
Finance Officer	<ul style="list-style-type: none"> Ensure legal and regulatory compliance for all accounting and financial reporting functions Manage corporate sponsors, and oversee financial division employees
Communications Officer	<ul style="list-style-type: none"> Oversee implementation of the marketing strategy - including campaigns, events, digital marketing, and PR Develop and advocate the brand on social networks, and manage online trainings, online course content and job portal Implement community outreach programs, organizing events, coordinating volunteers, writing and releasing publicity material such as press releases Develop public relations strategies that will promote the organization's mission
Technology Officer	<ul style="list-style-type: none"> Manage the website and iOS application, including the online training platform, to ensure smooth technical operations Work with Communications Officer to manage the online media content Oversee system design and changes in system architecture
Service Operations Officer & Coordinator	<ul style="list-style-type: none"> Align training and development with an organization's goals by creating or selecting course content and materials Coordinate mentors to align with prospective clients, helping to facilitate the services. Implementation of community activities, 'collision' events, public programs, community meetings/gatherings, and more Note – the Service Operations Coordinator is needed only as capacity is gained and operations are scaled
Employees, Teachers, and Volunteers	<ul style="list-style-type: none"> Run the day to day activities of specific job function Arrive on time to perform activities such as career counselling Meet the needs of clients by executing the specified services in a professional manner Perform the facilities management activities to ensure a clean and healthy working environment

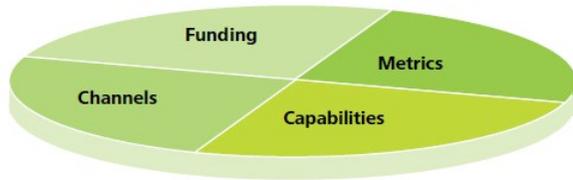
Operating Model Summary

The operating model outlines how the Centre will deliver value to users as well as how the organization will function. It represents the bridge between the strategy and the day-to-day operations that guide the Centre's team, providing the context, and enabling the behaviours that help realize the strategy and vision.



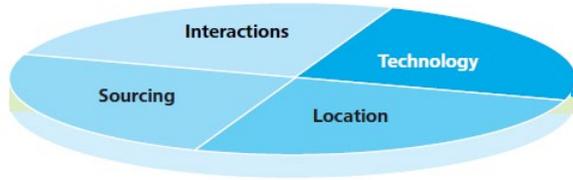
WHAT

The Bruce Centre of Excellence will provide specific service offerings for talent development and business incubation. For talent development, the Centre will provide a talent services portal and platform, in addition to career development services. For business incubation and acceleration, the Centre will offer mentorship services, collision events and integration services, in an effort to spur overall business collaboration. Although there are different service offerings in each pillars, the services will intersect through shared space, technology, and governance.



HOW

To support the service offerings, public funds will be raised through government (provincial and federal) grants and private funding will be raised through business sponsorships. The funding will be used to establish service operations, a competent leadership team, technological capabilities and a skilled execution employee network. Through social media, print and digital advertising, referral marketing and more, the Centre will utilize a multitude of networks to communicate with clients.



WHERE

Clients will engage the Centre through 3 main vehicles: online (self-serve option), a one-on-one help desk and hot line, or through group networking events. The Centre will be developed leveraging LEED platinum design and the online services will be provided through a partnership with a learning management software system, utilizing smart technology compatible with most computers, laptops and smartphones. The Bruce Centre of Excellence will be located to serve all neighboring communities.



WHO

A Board of Directors, who will be supported by a Fundraising Committee and an Executive Director, will govern the Bruce Centre of Excellence. At launch, the Executive Director will work alongside a project committee for each pillar, in addition to a Communications Officer and Technology Officer. As the Centre is scaled, a Service Operations Officer and Coordinator, in addition to a Finance Officer will be required. A strong employee network of teachers, office staff, guidance counselors and facility management staff will be required at launch and will develop as the Centre grows.



Financial Forecast

Financial Forecast Budget Model

The financial forecast creates a clear path to achieve the organization’s goals. The forecast is built using Deloitte’s experience with similar operating models, incorporating a non-profit organization structure and the desired state of a 50/50 public/private funding distribution.

Definitions

Public Funding - refers to government grants and includes grants at Federal and Provincial level – funds are not expected to be repaid

Private Sponsorships - refers to financial support provided from private businesses looking to assist

Service Operations - refers to revenue generated from membership fees, pay-per-use trainings and other service revenue

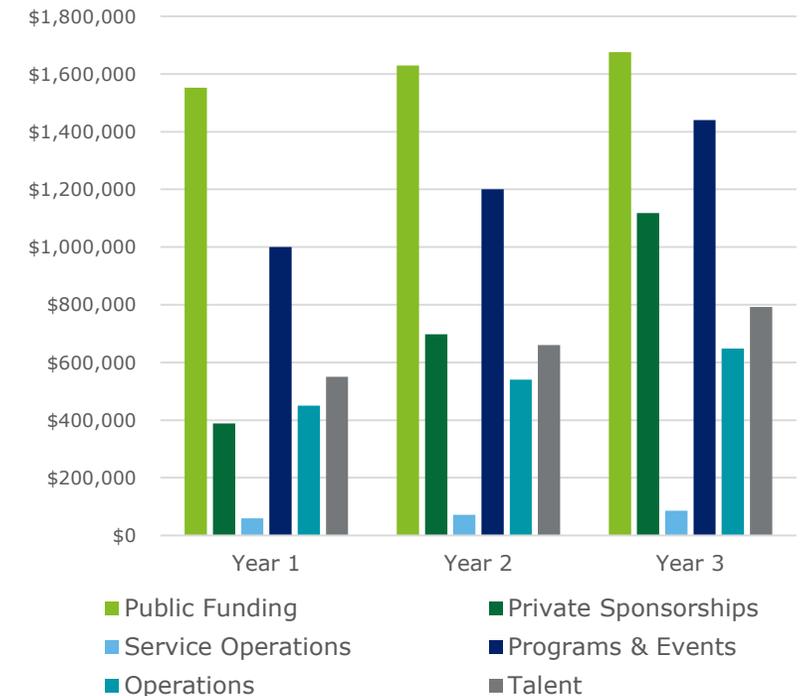
Programs & Events - refers to the costs in setting up information sessions, job fairs, trainings and other community projects/events, including marketing and communication expenses

Operations – refers to all ongoing business expenses not including or related to direct labor or direct programs/overhead

Talent – refers to salaries and wages for both full-time and part-time employees

	Year 1	Year 2	Year 3
Revenue			
Public Funding ¹	\$1,552,000	\$1,630,000	\$1,676,000
Private Sponsorships ¹	\$388,000	\$698,000	\$1,118,000
Service Operations ²	\$60,000	\$72,000	\$86,000
Total	\$2,000,000	\$2,400,000	\$2,880,000
Expenses			
Programs & Events ³	\$1,000,000	\$1,200,000	\$1,440,000
Operations ³	\$450,000	\$540,000	\$648,000
Talent ³	\$550,000	\$660,000	\$792,000
Total	\$2,000,000	\$2,400,000	\$2,880,000

Budget Forecast



From year 1 to year 3, the projected funding split moves closer to a public/private funding equilibrium, ultimately targeting a 50/50 distribution.

¹ Revenue projections are based on Deloitte’s experience with non-profit organizations, who operate on a public/private funding model. In year 1, public funding will represent 80% of the total funds raised, with private sponsorships providing the remaining 20%. In year 2, the breakdown will move to a 70/30 split and by year 3, it will move to a 60/40 split. Long-term, the organization will operate on a 50/50 public/private funding model.

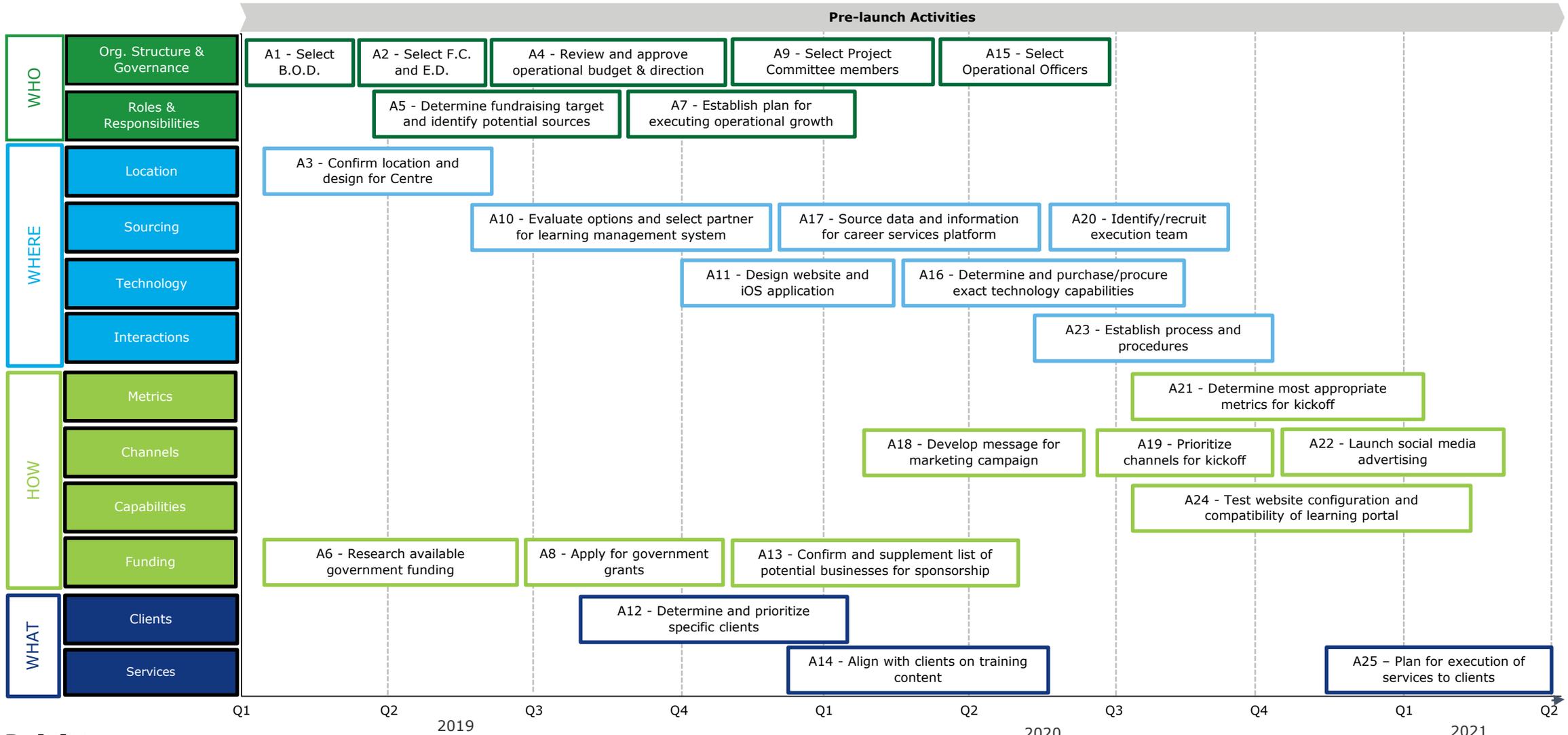
² The projection is built off a targeted year 1 membership base of 200 members. Growth is expected at 20% each year.

³ Based on Deloitte’s experience with similar operating models, expenses are estimated based on cost per square foot, assuming a facility size of approximately 10,000 square feet.

Tactical Roadmap

Roadmap Next Steps

Below is an illustrative, time-bound roadmap to determine the exact activities required for a successful pre-launch.



Roadmap Next Steps

A detailed description of each of the activities illustrated on the strategic roadmap.

#	Activity	Dependency	Description	Timeline	Responsibility
A1	Select Board of Directors (B.O.D.)	N/A	<ul style="list-style-type: none"> Gauge interest from business leaders, government agents, academia representatives, and union delegates in joining B.O.D. Screen & select candidates after extensive selection process 	Q1 2019	TBD
A2	B.O.D. selects Fundraising Committee (F.C.) members and Executive Director (E.D.)	A1	<ul style="list-style-type: none"> Review applications and profiles for F.C. members and E.D. Select the F.C. members and the E.D. after extensive selection process 	Q1 2019	Board of Directors
A3	Confirm location and design build for Centre	N/A	<ul style="list-style-type: none"> Confirm location of the Centre is ready for build and has all necessary permits to do so Review design of the Centre's build, ensuring space required for each pillar is sufficient 	Q1 2019	Board of Directors and Executive Director
A4	B.O.D. and E.D. review and approve operational budget and organizational direction	A1, A2	<ul style="list-style-type: none"> Conduct a meeting for the B.O.D. and E.D. to approve the overarching direction for the Bruce Centre of Excellence Review the operational budget and direction to ensure the organization can continue to fund current and future commitments 	Q1/Q2 2019	Board of Directors and Executive Director
A5	Determine fundraising target and identify potential sources	A2	<ul style="list-style-type: none"> Conduct a meeting for the F.C. to determine exact fundraising targets, strategy to obtain the funds and identify future sources to focus on 	Q1/Q2 2019	Fundraising Committee
A6	Research available government funding to align with government priorities and mandates	A2, A4	<ul style="list-style-type: none"> Conduct a meeting for the F.C. to review government mandates and priorities and to prepare applications for government grants from Federal and Provincial levels of government Engage government incentive specialists to determine available grant incentive programs 	Q1/Q2 2019	Fundraising Committee
A7	Establish plan for executing operational growth	A4	<ul style="list-style-type: none"> Evaluate and finalize the strategy for the Bruce Centre of Excellence by determining a set of clear priorities and building a comprehensive roadmap for post-launch success. 	Q3 2019	Board of Directors and Executive Director

Roadmap Next Steps

A detailed description of each of the activities illustrated on the strategic roadmap.

#	Activity	Dependency	Description	Timeline	Responsibility
A8	Apply for government grants from all three levels of government	A6	<ul style="list-style-type: none"> Submit government grant applications to Federal and Provincial governments, outlining exactly what the funds will be used for and how the funds will be used to support government mandates and priorities 	Q3/Q4 2019	Fundraising Committee
A9	Select Project Committee Members	A1, A2	<ul style="list-style-type: none"> Gauge interest from stakeholder groups in joining the Project Committee team for either the Business Incubation pillar or the Trades and Skilled Workforce Secretariat pillar Screen & select candidates after extensive interview process 	Q3/Q4 2019	Board of Directors and Executive Director
A10	Evaluate options and select partner for learning management system	N/A	<ul style="list-style-type: none"> Evaluate learning management systems available on market by determining which systems best aligns with the strategy of the Centre. Select learning management software and work with partner to build platform compatible with the Centre's goals and aspirations 	Q3/Q4 2019	Project Committee
A11	Design website and iOS application	N/A	<ul style="list-style-type: none"> Evaluate and select partner to help design Bruce Centre of Excellence website and iOS application Work with partner to build website and application to ensure alignment with strategic objectives 	Q4 2019	Project Committee
A12	Determine and prioritize specific clients within the identified groups to target	N/A	<ul style="list-style-type: none"> Review client groups and prioritize order for approach Determine how and best to approach each customer segment, comparing their wants/needs with service offerings 	Q3/Q4 2019	Executive Director and Project Committee
A13	Confirm and supplement list of potential businesses for sponsorship	N/A	<ul style="list-style-type: none"> Review list of businesses who previously expressed interest in partnership or sponsorship Evaluate incremental businesses who may have interest in future partnership or sponsorship Determine best course of action in targeted approach to business partners 	Q4 2019	Executive Director and Project Committee

Roadmap Next Steps

A detailed description of each of the activities illustrated on the strategic roadmap.

#	Activity	Dependency	Description	Timeline	Responsibility
A14	Align with clients to determine training content that is most desired and relevant	A12	<ul style="list-style-type: none"> Conduct brainstorming meeting with client focus group (reps from each stakeholder group) to determine which training types to be offered at launch 	Q1 2020	Executive Director and Project Committee
A15	Select Operational Officers	A2, A10	<ul style="list-style-type: none"> Gauge interest for Operational Officer roles, to run specific divisions within specified pillar Screen & select candidates after extensive interview process 	Q1/Q2 2020	Executive Director and Project Committee
A16	Determine and purchase/procure exact technology capabilities	N/A	<ul style="list-style-type: none"> Review technology capabilities required at launch Evaluate potential partners to supply required technology, ensuring compatibility with strategic objectives and operational process 	Q2/Q3 2020	Executive Director and Technology Officer
A17	Source data and information for career services platform	N/A	<ul style="list-style-type: none"> Review potential sources and industry best practices to leverage career services operations Begin to source the career services data and information, ensuring alignment with operational strategy and objectives 	Q2/Q3 2020	Executive Director and Service Operations Officer
A18	Develop message for marketing campaign	A16	<ul style="list-style-type: none"> Develop clear career path messages for local opportunities Cultivate messaging for training opportunities to be offered at the Centre and online 	Q2/Q3 2020	Executive Director and Communications Officer
A19	Prioritize channels for kickoff	N/A	<ul style="list-style-type: none"> Review methods through which the organization will communicate with clients Rank each method in order of importance, and prepare priority channels for launch 	Q3/Q4 2020	Executive Director and Service Operations Officer
A20	Identify/recruit skilled teachers, guidance counselors, mentors & paraprofessionals	A14	<ul style="list-style-type: none"> Gauge interest from teachers, guidance counselors and mentors in joining the Bruce Centre of Excellence 'execution' team Screen & select candidates after extensive interview process 	Q3/Q4 2020	Executive Director and Service Operations Officer

Roadmap Next Steps

A detailed description of each of the activities illustrated on the strategic roadmap.

#	Activity	Dependency	Description	Timeline	Responsibility
A21	Determine most appropriate metrics for kickoff	N/A	<ul style="list-style-type: none"> Review metrics for which the organization will measure and track success Rank each metric and begin tracking of priority metrics 	Q4 2020	Executive Director and Service Operations Officer
A22	Launch social media advertising	A17	<ul style="list-style-type: none"> Launch message for marketing campaign through extensive social media advertising channel, including Facebook, Twitter, Instagram, LinkedIn, and others 	Q1 2021	Executive Director and Communications Officer
A23	Establish process and procedures for help desk and customer service inquiries	A14	<ul style="list-style-type: none"> Establish standard operating procedures (SOP's) for operational staff, in preparation of launch 	Q1 2021	Executive Director and Service Operations Officer
A24	Test website configuration and compatibility of learning portal	A11	<ul style="list-style-type: none"> Test the website operations and configuration in anticipation of launch Test compatibility of selected learning management system with website and iOS application 	Q1/Q2 2021	Executive Director and Technology Officer
A25	Plan for execution of services to clients	A14, A24	<ul style="list-style-type: none"> Prepare for launch of Bruce Centre of Excellence by finalizing content for training development Ensure people, process and technology are in place to deliver service offerings 	Q1/Q2 2021	Executive Director and Service Operations Officer

Appendix

Appendix Case Studies – Environmental Scan

Creative Destruction Lab (CDL) and the Digital Media Zone



Key Facts	
What?	University run start-up incubators and accelerators
Where?	Toronto, Canada

What...?

Both the Creative Destruction Lab (CDL) and the Digital Media Zone (DMZ) are incubators and accelerators created and partly run by academic institutions (University of Toronto and Ryerson, respectively). Both incubators provide programs and facilitation for current university students, recent grads, and experienced start-ups, and aim to connect participants with customers, advisors, influencers, and other entrepreneurs. Both the CDL and DMZ have the reputation of being leaders within the start-up acceleration and incubation space, and providing attractive alternatives to similar spaces / services in the U.S.

How...?

CDL and DMZ provide an interactive and collaborative space where like-minded individuals can collaborate on and develop groundbreaking technology innovations.

Benefits...?

CDL and DMZ have already proven their benefit to Canada by generating new jobs, companies, and attracting significant talent and media-coverage to the Canadian tech start-up landscape. These initiatives drive capital into Canada, and continue to build Canada's reputation on the world-stage.

Sources: creativestructionlab.com/program/dmz.ryerson.ca/about/

Ontario Centres of Excellence



Key Facts	
What?	Invests with the goal of commercializing Canadian innovation
Where?	Toronto, Canada

What...?

Ontario Centres of Excellence (OCE) connects entrepreneurs, start-ups, industry, academia and investors to commercialize early-stage Ontario innovation and compete globally. OCE also focuses on the development of "next generation" innovators through fellowships and programs, and provides tailored programs to commercialize innovations, transfer technologies and develop promising talent.

How...?

OCE has a significant interest in connected and autonomous vehicles through its Connected and Automated Vehicle (C/AV) Initiative. The C/AV Initiative aims to link the various technology clusters and regions across Ontario to create an ecosystem that makes Ontario the global epicenter of automotive technology development and demonstration.

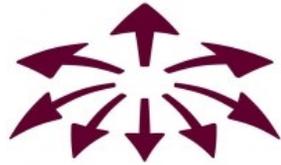
Benefits...?

OCE's initiatives help to drive the creation of new jobs, products, services, technologies, and businesses in Ontario, and have a positive social impact in communities across the province. They connect different players in the ecosystem, and streamline the funding application processes for companies and entrepreneurs.

Source: oce-ontario.org/about-us

Appendix Case Studies – Environmental Scan

McMaster Innovation Park



Key Facts	
What?	Geographic location focused on collaboration space for like-minded companies
Where?	Hamilton, Canada

What...?

McMaster Innovation Park (MIP) is an award winning research and innovation park that offers collaborative spaces for start-ups, businesses and researchers to co-locate, connect and commercialize. MIP is home to CanmetMATERIALS, Canada’s largest research centre specializing in metals and materials fabrication, processing and evaluation, and the McMaster Automotive Resource Centre, a set of university labs where researchers, students and industry professionals work together to solve issues facing the automotive industry, and design solutions for the future.

How...?

MIP provides co-location and collaboration spaces for IoT-focused entrepreneurs and start-ups – in particular, those focused on smart manufacturing.

Benefits...?

MIP will help spur economic and social development by helping to facilitate and accelerate innovation, transfer of knowledge and the commercialization of research.

Source: <https://mcmasterinnovationpark.ca/about-us>

MaRS



Key Facts	
What?	World renowned urban innovation district, incubator, and accelerator
Where?	Toronto, Canada

What...?

As a world renowned urban innovation district, MaRS brings together entrepreneurs, corporations, mentors, investors, university institutions, and laboratories to test and build concepts. MaRS is a key player in Canada’s innovation ecosystem, and is home to the Canadian branches of some of the largest technology companies in the world. By providing space and facilitation programming for entrepreneurs, start-ups, small-to-medium enterprises, and industry experts, MaRS connects all parties necessary to foster and develop innovation.

How...?

Acting as a “connector”, MaRS provides the platform and resources that innovators need to succeed. Through cross-pollination and collaboration, companies can work with and learn from experienced counterparts to test the feasibility of their ideas and improve their likelihood of success.

Benefits...?

MaRS adds to the Corridors network and reputation, and contributes to the creation of new jobs, companies, and sources of capital.

Source: mars.com/global/about-us

Appendix Case Studies – Environmental Scan

Lambton Energy Research Centre



Key Facts	
What?	College run, focused on education, training and research and development
Where?	Sarnia, Canada

What...?

The Lambton Energy Research Centre’s goal is to advance the research, development and commercialization of renewable energy management and optimization technologies. The Centre's Sustainable SmartHouse aids as an educational facility and testing laboratory for industrial partners pursuing research in renewable energy management and optimization, end-use hydrogen and fuel cells. The newly-renovated, world-class facility, was designed to bring together academic programing, industry-standard training, and research labs.

How...?

The Lambton Energy Research Centre was formed using a five-year College and Community Innovation Program Grant from the Natural Sciences and Engineering Research Council of Canada (NSERC). The official opening on September 20, 2018, came after a two-year, \$14.2 million upgrade of the 34,000 sq. ft. facility, which also included the addition of 7,000 sq. ft. of training space.

Benefits...?

The Lambton Energy Research Centre received the government grant due to growing provincial and federal interests in the improvement, development and commercialization of energy storage, process optimization, management technologies and systems for residential, commercial and industrial applications. The Centre aims to address this growing interest.

Source: lambtoncollege.ca/About_Us/Centres/Energy_Research_Centre/Home/

Appendix Programs and Funding Opportunities

Over \$6 Billion in government funding is potentially available to the Bruce Centre of Excellence and other local organizations that are looking to expand on creating jobs, workforce development and pre-commercialization ideas.

Programs and Funding

Examples of 'Government Incentive (GI) Programs' for organizations that support development of technology prior to commercialization include;

- **SWODF (Southwestern Development Fund) program.** GI program available for organizations that are located or planning to be located in SWO region investing more than \$500K and creating a minimum of 10 jobs. The program will contribute up to 15% of the cost of the project including new equipment and building expansion cost. The maximum contribution is established at \$1.5M.
- **SIF program (Federal program).** The purpose of this program is to support the development of innovative product or services at the pre-commercialization stage. It provides repayable and non-repayable contributions to support four distinct streams of activities:
 - **Stream 1:** Encourage research and development (R&D) that will accelerate technology transfer and commercialization of innovative products, processes and services;
 - **Stream 2:** Facilitate the growth and expansion of firms in Canada;
 - **Stream 3:** Attract and retain large scale investments to Canada; and
 - **Stream 4:** Advance industrial research, development and technology demonstration through collaboration between academia, non-profit organizations and the private sector.

The program is available to organizations of all sizes across all of Canada's industrial and technology sectors. Minimum project size: \$1M with a contribution up to 50% of the cost of the project including direct labor, overhead, subcontractor, consultants, direct materials and equipment, other indirect costs, land and buildings.

These are just two examples of potential programs and funds available in Ontario and Canada. It will be important for the Fundraising Committee for the Bruce Centre of Excellence to consult grant and incentive specialists to determine exactly which opportunities and programs are available.



Appendix Workforce Development and Retraining Strategies

Developing the required workforce and utilizing the available funding to support business incubation, job creation, and workforce development will be imperative to the success of the Bruce Centre of Excellence.

Primary Example of Funding for Retraining your Workforce



- **The Canada Job Grant (CJG)** is a federal initiative that is administered at the provincial level and assists Canadian businesses with providing short-term third party training to new and existing employees that will help bridge workforce skills gaps.

- Training program that will **cover 66% of the training fees** provided by a third party to upskill talent.
- The program will **cover 83% of the training fees for organization** with less than 50 employees for training that creates new or better jobs, leads to job retention, and improves employability.
- **Any business**, including not-for-profit organizations, with a plan to train Canadians for a new or better job is eligible to apply.
- Eligibility criteria **apply to all employers** regardless of whether they are training one or multiple individuals.

Additional Information for CJG;

Be licensed to operate in Ontario; Be applying for training that is delivered in Ontario and is related to a job that is also located in Ontario; Comply with the Occupational Health and Safety Act and the Employment Standards Act.

An employer must not be: a federal, provincial or municipal government and/or agency; Be a designated broader public sector organization, as defined by the Broader Public Sector Accountability Act; Be district social services administration boards established under the District Social Services Administration Boards Act, notwithstanding their exclusion under the Broader Public Sector Accountability Act.

Additional Examples of Funding for Retraining your Workforce

Funding Opportunities:

- **IRAP program** to cover 80% of the technical labor and 50% of the subcontractor fees to provide expertise for the development of the new product or services.
- **Youth employment program.** The program will fund up to \$20K in support of salary for Graduates of a recognized Post-Secondary institution with limited work experience in their field, Canadian Citizen or eligible to work in Canada, 18-30 years old, 6 months to a year of employment.
- **MITACS program** to support partnership between University and organization. 2 programs: Accelerate program for a 4 months module to resolve technical challenges. Organization pay \$7,500 and MITACS pay \$7,500. Elevate program contributes up to \$60K/year in funding for a min 2 years duration project for post-doctoral graduates. The organization contribute to \$30K and the program \$30K.
- **Ontario Center of Excellence** also provides two programs (VIP I and VIP II). The VIP I program that contributes to \$20k in funding. The organization provides equivalent amount as follow: 25% cash contribution and 75% in kind contribution. The VIP II program contributes up to \$75K per year and the organization provides 50% cash contribution and 50% in kind contribution for project between one and two years duration.

These are additional examples of funding and incentives available in Ontario and Canada. Grant and incentive specialists will be required to identify which incentives are available.



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