A BRITISH COLUMBIA SCREEN-BASED MEDIA INDUSTRY HUMAN RESOURCE STRATEGY

JULY 2011

Prepared by the BC Screen-Based Media Industry HR Committee

EXECUTIVE SUMMARY

Leaders from Film & TV, Animation & Visual Effects, and Video Games sectors of the screen-based media entertainment industry in British Columbia have identified the critical importance of high quality talent as a key factor in their success to date, and more significantly in their ability to compete on the world stage going forward.

The three sectors contribute significantly to the economy of BC, and enhance the reputation of the province as a desirable location to do business. Over the last two decades, Film & TV production has been the third fastest growing sector in the provincial economy with such BC companies as Omni Film, Brightlight Pictures and Paperny Films creating content for Canadian and International markets. Electronic Arts, an industry leader in Video Games, has spawned the growth of video game companies in BC that include United Front Games, Slant Six Games, and Ubisoft to name a few. Animation studios such as Rainmaker Entertainment, Pixar, and Nerd Corps Entertainment have chosen Vancouver as their preferred business location over other jurisdictions. Visual Effects companies that include The Moving Picture Company, Prime Focus, Image Engine, and The Embassy have all developed facilities in Vancouver to support the entertainment industry.

Recognizing the importance of a highly talented workforce to their success, and understanding that there are a number of human resource challenges that all 3 sectors face, a 'BC Screen-based Media Industry Human Resources Committee' was formed to develop a Human Resource Strategy for the industry. The Strategy is intended to set a course of action that will ensure that British Columbia has the depth and breadth of talent to continue as a leading entertainment production and service hub in the world.

British Columbia's screen-based media industry has become a global leader. Its Video Games sector is among the world's top 10; BC is the third largest production centre in North America for Film & TV; and BC is one of the 5 largest production centres worldwide for Animation & Visual Effects.

Yet, there are critical challenges facing the industry – its growing market share and competitiveness are in jeopardy of being eroded. An overriding issue facing the BC screen-based media industry is the lack of a strategic long-term approach to industry development, including a comprehensive human resource strategy. Specifically, the industry must address a number of key challenges to ensure it has continued high-quality talent:

- **Labour and skill shortages exist in critical positions today.** There is a deficit both in a sufficient number of workers and workers with the right kinds of skills. These shortages will continue to increase as competition for skills increases based upon demographic trends.
- **Specific skill gaps need to be identified.** While the research leading up to this Strategy identified some occupations and skill sets that are difficult to fill, a more comprehensive analysis of current and expected skill shortages in the industry is needed.
- **More experienced and skilled talent is required in many roles.** These include senior leaders that understand the business and are known in the industry; business leaders that have deeper general business and marketing skills; management leaders that have enhanced people management skills; and creative talent that effectively uses

new technologies.

- **Technological advances are significantly changing work.** Rapid and continuous introduction of new technologies constantly change work processes, requisite workforce skills, and job structures. Technological changes in turn affect the flow of work and increase challenges in efficiently scheduling and organizing work.
- **Available training and education needs to keep pace with industry needs.** The curriculum and processes to train entry-level workers as well as upgrade the skills of seasoned workers is inadequate. Graduates do not often meet employers' requirements, and lack job readiness.
- **Minimal succession plans are in place to transfer key industry knowledge.** A significant number of Film & TV workers are retiring from the workforce and the need to transfer knowledge to younger workers is critical.
- **There is a lack of formal career paths and development plans.** There is minimal existence of formal career paths for advancement, lessening the attractiveness of the industry for new entrants, and inhibiting career growth for existing employees.
- **Employee retention is at risk.** Work in the industry is 'project-based' which creates a lack of secure employment, negatively impacting employee loyalty to organizations. Turnover within and between sectors is increasing.
- **The transition of existing and older workers needs to be supported.** Part of the retention challenge is facilitating the transition of existing workers into other jobs that make use of their talents and enable them to continue to work.
- **Many employers are small.** Many companies do not have the capacity or resources to make needed investment in their employees.
- **The industry must attract and retain a diverse workforce.** Employers in the industry need to draw from a broader pool of potential talent and reflect the diversity of the workforce by attracting, supporting and retaining women, visible minorities, new Canadians, and Aboriginal people.
- **Foreign worker/immigration policy is not meeting needs across all the sectors.** The ability to import talent from outside Canada into critical skilled jobs with skill shortages in Animation & VFX and Video Games is critical. Senior external talent is often a prerequisite to secure projects for BC.

An industry-wide business strategy and action on these HR challenges is necessary ensure the long-term viability and competitiveness of BC's screen-based industry.

To address these challenges the Committee has created for the industry a proposed vision, a long-term workforce mission, and six key goals to achieve a long-term mission. To ensure that this strategy was comprehensive and thorough, a best practice Human Resource Strategy framework was applied.

VISION

BC Screen-based Media is a worldwide leader in high value screen-based entertainment.

MISSION

To attract, develop, and retain high performing, talented, and engaged people.

GOALS

1. Identify and implement a mechanism to lead the human resource strategy.
2. Plan for immediate and long-term workforce needs.
3. Attract, recruit and retain the best talent.
4. Enhance current and develop new education and training programs.
5. Develop and promote career paths and enable career development.
6. Strengthen industry leadership capacity.

These six goals include a number of short and long-term strategies designed to achieve the goals across the Industry as a whole, as well as address the most critical challenges for each sector.

The Committee sought the endorsement of the above strategic direction by key industry stakeholders through industry roundtable consultations. This Strategy reflects the input of those roundtables.

EXPECTED OUTCOMES

By achieving the following outcomes, this Human Resource Strategy will support the growth and competitiveness of BC's screen-based media industry by increasing the talent quantity and quality in BC. Specifically, the Strategy will:

- Improve cooperation between industry sectors and the ongoing sharing of best practices;
- Increase the number and diversity of people choosing Screen-based Media as a career;
- Increase the number and diversity of people completing industry-focused education programs and being hired into roles within the Industry;
- Assist employers and unions embracing technological change so that work processes and jobs continually evolve to meet industry needs;
- Ensure highly skilled workers are available to fill critical positions;
- Establish BC as the jurisdiction of choice for productions because of its superior creative, technical and managerial talent.

Through successful planning, developing and implementing the strategies within this shared HR Strategy for the Screen-based Media Industry in BC, the Industry, at a minimum will continue to be recognized as a significant player within each of the three sectors and ultimately has the potential to leverage itself as one of the top tier leaders worldwide in all sectors.

It's all about the talent...

While some may question the cost of this investment, the Strategy suggests the cost of not taking collective action will be much higher.

TABLE OF CONTENTS

BRITISH
COLUMBIA

1. INTRODUCTION

The BC screen-based media industry (the "industry") comprises companies, labour, and other organizations involved in television and film production, animation and visual effects studios, and companies that develop video games and other interactive content for international distribution on a variety of media platforms.

The BC Screen-Based Media Industry Human Resources Committee (the Committee) was established by various industry groups, brought together by BC Film, to oversee the creation of a Human Resource Strategy for this industry. The Committee is comprised of employers and other senior stakeholders representing the three sectors (the sectors) of the industry: Film & Television (Film & TV); Animation and Visual Effects (Animation & VFX); and Video Games (Games).

The overarching challenge common across all three sectors of the industry is to ensure a highly skilled and accessible talent pool capable of producing high-quality entertainment. This challenge and opportunity created a compelling reason to bring the sectors together for the first time in an effort to create a cross-sector HR strategy. While a cross-sector business strategy does not currently exist, the creation of an HR Strategy is essential for the industry to gain experience and enable it to explore possibilities for further synergies in addressing other cross-sector business needs as they are identified.

The Committee sponsored research to determine the capacity of the industry to meet its current and future needs given current levels of business activity and projections for future growth.

The research identified a number of critical human resource challenges for the industry, as well as a number of recommendations for consideration and inclusion in an integrated, cross-sector Human Resource Strategy.

In mid-2010, using the findings from the research phase of the initiative, the Committee participated in a process to develop a comprehensive Human Resource Strategy for the industry based on best practices and advice from strategic human resource consultants.

The methodology used to create the Human Resource Strategy includes recommendations from the research phase of the project, interviews with a representative sample of Committee members by the consultants, a planning session among Committee members led by the consultants, and best practice strategies identified by the consultants.

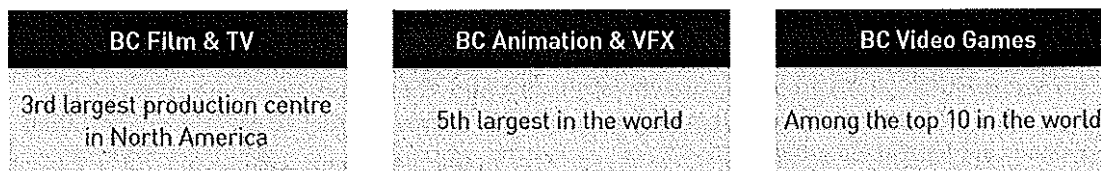Based upon these deliberations, this document represents the proposed Human Resource Strategy developed in part by the Committee in response to the overarching challenge of ensuring that the Industry has a highly talented workforce in BC to meet its current and future industry needs. It was used as a basis to consult with key industry stakeholders through a series of three roundtable consultations.

2. INDUSTRY PROFILE

The industry in BC has grown and evolved over the last three decades. Film & TV production, including both foreign and domestic productions, has been the third fastest growing sector in the BC economy since 1990 according to the BC provincial government. In the last several years, animation and visual effects facilities have emerged as a significant sector with top brand name companies. The Games sector in Canada started in Vancouver with EA's largest games studio and has now spawned a thriving industry.

All three sectors have made significant investments in physical infrastructure, equipment, and talent in BC. These investments continue to be a major draw for industry leading organizations to locate here with the most recent examples being the location of several major Animation & VFX and Games development companies. As Figure 1 shows, this, along with favorable provincial and federal government tax credit policies and a track record for high quality and commercially successful productions, have made the BC industry one of the leading jurisdictions in North America and the world.

FIGURE 1

BC Film & TV	BC Animation & VFX	BC Video Games
3rd largest production centre in North America	5th largest in the world	Among the top 10 in the world

BC companies producing entertainment face a range of competitive forces, similar to other jurisdictions competing in the global economy. These forces are challenging the sustainability and continued development of the industry in its current configuration. Digital technology and new platforms for media distribution are transforming the way media content is produced, distributed and consumed, while also providing opportunities for business development and growth. The widespread emergence of tax credits and production incentives over the last decade is creating a very competitive environment to attract screen-based media companies and productions to jurisdictions throughout North America.

According to data gathered in the research phase of the project, it is estimated that screen-based media in BC generates expenditures of more than $2 billion in the BC economy and provides employment for nearly 21,000 workers[1].

The composition of the industry across all sectors includes over 1,000 companies ranging from a small number of large employers with more than 100 workers, to the majority employing between 1 and 4 people. This number increases dramatically when companies are conducting Film & TV production.

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1 R.A. Malatest & Associates, *BC Screen-Based Industry Workforce Skills Analysis Project.* Prepared for the BC Screen-Based Media Industry HR Committee. June 2010. Estimates derived from the following sources:
- BC Film Commission, *Economic Impact Analysis of the BC Film & Television Industry,* PWC (2009);
- Malatest Estimates using EP Canada and Cast & Crew payroll data (2010);
- BC Interactive Task Force, *Impact Analysis of the Video Game Industry,* PWC (2009);
- Data from Industry Committee members (for Animation and Visual Effects) (2010).

The industry has a wide and complex range of employment relationships. While the employment relationship in the Games sector is primarily one where employees have ongoing jobs (over 90% of employees), in the Animation & VFX sector, over 70% of workers are on a term contract with the employer. In Film & TV, over 95% of the workforce is on contract, and the majority of employment is provided by Los Angeles-based producers requiring service from local talent. Workers in the Film & TV sector are predominantly unionized, whereas there are few unionized workers in Animation & VFX, and no unionized employees in the Games sector.

As would be expected based upon the differing maturity levels of the 3 sectors, each sector has a different demographic age profile of workers. Table 1 shows the predominant workforce cohort in each sector. Video Games has a predominantly younger workforce; Animation & VFX has a blend of younger and more mature workers; and Film & TV has workers spanning all of the demographic age groups with a significant portion of its workforce (23%) nearing retirement.

TABLE 1

AGES	Video Games	Animation & VFX	Film & TV
	25 to 39 = 29%	40 to 54 = 48%	55+ = 23%

The next few years show promising growth for the Industry. The Games sector in particular, is being driven by new technologies, better graphics and improved interactive experiences resulting in significant forecasted growth.

While the recent economic downturn has impacted all three Sectors, recent decisions to locate new studios in Vancouver demonstrate the markets' long-term expectations of growth in the industry[2]. Research conducted earlier in this project forecast employment in the BC industry will grow by 22% overall over 3 years.

Table 2 shows sector employment growth projections[3] from 2009 to 2012, ranging from 6% for Film & TV to 140% for Animation & VFX. The Video Games growth rate was moderated from an originally higher projection because of competitive pressures from other jurisdictions.

TABLE 2

NUMBER OF EMPLOYEES	Film & TV	Animation & VFX	Video Games	Total
Employment 2009	16,500	900	3,400	20,800
Employment 2012	17,500	2,200	3,900	23,600
Employment Growth	6%	140%	15%	13.5%

Overall, these forecasts reflect an overall 13.5% growth rate – an impressive 4.5% per year – and 2,800 new jobs. It should be noted that the number of employees are estimates only and are based upon data from a number of industry sources and studies.

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2 Growth Forecast Assumptions:
  • BC tax credit policy remains competitive with other jurisdictions;
  • An adequate supply of workforce skill is available to meet the demands of industry growth;
  • Industry market growth occurs as forecasted.

3 R.A. Malatest & Associates, June 2010; and Industry sources (2011).

3. CHALLENGES & ISSUES

3.1   STRENGTHS, WEAKNESSES, OPPORTUNITIES & THREATS

As an industry, screen-based media in BC has a number of challenges as it strives to strengthen its competitive position and share in the growth projections of the industry worldwide.

The current industry situation can be summarized in the following strengths, weaknesses, opportunities and threats:

STRENGTHS
- Leader in all 3 sectors
- History of Film & TV production
- Infrastructure
- Skilled talent
- Critical mass
- Competitive tax credits
- Project track record
- Proximity to West Coast & same time zone as California
- Moderate climate, metropolitan location, diverse topography

WEAKNESSES
- Reliance on foreign service business and publishers
- Current domestic production under stress
- Small Canadian capital market
- Limited IP rights
- Lack of top creative and management talent
- Nature of project work creates less stable workforce
- Relatively high cost of living
- Lack of an industry strategy or HR strategy

OPPORTUNITIES
- Industry growth forecasts
- Affinity with West Coast & Asia
- Great foundation to attract more talent
- Vancouver as one of the top cities in the world in which to work and live
- Greater collaboration and communication among Film & TV, Animation & VFX, and Video Games

THREATS
- Stronger Canadian dollar
- Uncompetitive tax incentives
- Greater competition with other jurisdictions
- Talent loss
- Not staying current on technology
- Eastern centricity of domestic business
- Barriers to recruitment of foreign workers and immigrants

While the industry needs to be competitive with other jurisdictions in terms of the cost of production and cost of living, attracting capital, and increasing intellectual property rights, it is clear that high quality talent - at senior leadership levels, among mid-level management, in creative disciplines, and in technical roles - is and will continue to provide a significant competitive advantage to the BC industry. The industry today has a strong foundation in a workforce that has demonstrated success in a large number of outstanding projects. However, to continue this success, there are a number of human resource challenges that need to be addressed to ensure there is a sustainable supply of highly talented, high performing people to meet the anticipated demand in the business.

3.2 IMPACTS OF BROAD PROVINCIAL DEMOGRAPHIC CHANGES

The changing demographics of the Canadian population are currently, and will increasingly have greater impacts on all industries including screen-based media. The two main demographic trends in B.C. are a significant number of baby boomers reaching retirement age, and too few new entrants to the labour market. For businesses employing people, the main implications of these demographic shifts are:

- The loss in BC of 676,000 workers due to retirement and death over the next decade
- A shortage of skilled labour to fill vacant positions. BC is forecasted to have between 80,000 and 160,000 unfilled positions over the next 10 years.
- An increasing reliance on immigration for supply of labour as one-third of jobs will be filled from outside the province.
- For the first time, workforces will have five generations of employees with different values and motivations.
- New generations of workers who look for employers with strong social and environmental responsibility agendas.
- Increasingly diverse workforces across genders and cultural backgrounds.
- Despite the increased aging and retirements, retirement patterns are also changing, due to economic imperatives, lifestyle changes, better health, and elimination of mandatory retirement.

## 3.3 KEY HUMAN RESOURCE CHALLENGES FOR THE INDUSTRY

- **Labour and skill shortages exist in critical positions today.** There is a deficit both in a sufficient number of workers and workers with the right kinds of skills. These shortages will continue to increase as competition for skills increases based upon demographic trends.
- **Specific skills gaps need to be identified.** While the research leading up to this Strategy identified some occupations and skill sets that are difficult to fill, a more comprehensive analysis of current and expected skill shortages in the industry is needed.
- **More experienced and skilled talent is required in many roles.** These include senior leaders that understand the business and are known in the industry; business leaders that have deeper general business and marketing skills; management leaders that have enhanced people management skills; and creative talent that effectively uses new technologies.
- **Technological advances are significantly changing work.** Rapid and continuous introduction of new technologies constantly change work processes, requisite workforce skills, and job structures. Technological changes in turn affect the flow of work and increase challenges in efficiently scheduling and organizing work.
- **Available training and education needs to keep pace with industry needs.** The curriculum and processes to train entry-level workers as well as upgrade the skills of seasoned workers is inadequate. As a result, graduates do not always meet employers' requirements, and lack job readiness.

- **Minimal succession plans are in place to transfer key industry knowledge.**
  A significant number of Film & TV workers are retiring from the workforce and the
  need to transfer knowledge to younger workers is critical.
- **There is a lack of formal career paths and development plans.** There are few formal
  career paths for advancement, lessening the attractiveness of the industry for new
  entrants, and inhibiting career growth for existing employees.
- **Employee retention is at risk.** Work in the industry is 'project-based' which creates
  a lack of secure employment, negatively impacting employee loyalty to organizations.
  Turnover within and between sectors and jurisdictions is increasing.
- **The transition of existing and older workers needs to be supported.** Part of the
  retention challenge is facilitating the transition of existing workers into other jobs
  that make use of their talents and enable them to continue to work.
- **Many employers are small.** Many companies do not have the capacity or resources
  to make needed investment in their employees.
- **The industry must attract and retain a diverse workforce.** Employers in the industry
  need to draw from a broader pool of potential talent and reflect the diversity of the
  workforce by attracting, supporting and retaining women, visible minorities, new
  Canadians, and Aboriginal people.
- **Foreign worker/immigration policy is not meeting needs across all the sectors.**
  The ability to import talent from outside Canada into critical skilled jobs with skill
  shortages in Animation & VFX and Video Games is critical. Senior external talent
  is often a prerequisite to secure projects for BC.

4. HUMAN RESOURCE STRATEGIC FRAMEWORK

A best practices human resources strategy is an integral component of an industry's or company's business strategy, along with a focus on customers' needs, strong financials, and effective organizational processes. It is well understood in business today that the 'people' (human resources) component is the most significant source of competitive advantage particularly in service and production industries that rely almost exclusively on the strength of its workforce for creativity, skills and innovation.

FIGURE 2

EXTERNAL DRIVERS   BUSINESS STRATEGY AND PLAN
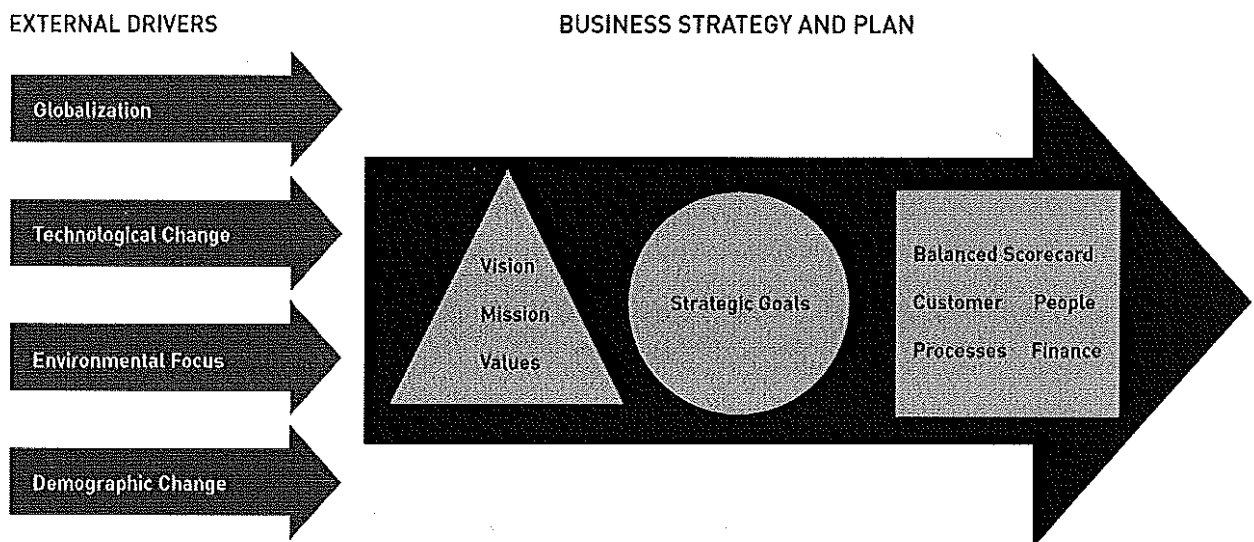
The foundation of a human resources strategy is a planning framework centred around a long-term vision and mission. It allows stakeholders to react to short-term immediate priorities while at the same time enabling longer term planning that responds to ongoing changes in the business environment. This framework enables:

- **Integration** – So that various stakeholders have a common understanding and are able to 'work off of the same page', enabling economies of scale in effort, and effective synergies between stakeholders.
- **Scalability** – At all levels – industry, sector, and organizational. Enables not only large-scale strategies at the industry level but also each sector and organization to work on specific strategies that support larger goals.
- **Balance** – Between the needs of people and the needs of the business. While it is implicit that it is the business that drives the need to have employees, successful organizations know that more than any other business driver, it is its people that are the source of competitive advantage.
- **Holistic perspective** – Includes all of the people practices in the workplace, and creates understanding that the practices are interdependent and impact one another.

PEOPLE PRACTICES

A strategy to attract, develop and retain talent includes several elements. However, it is important to note that not all of the factors in the above diagram will come into play to the same extent or at all in this HR Strategy because some may not apply or be relevant to the industry or they may not represent gaps or priorities.
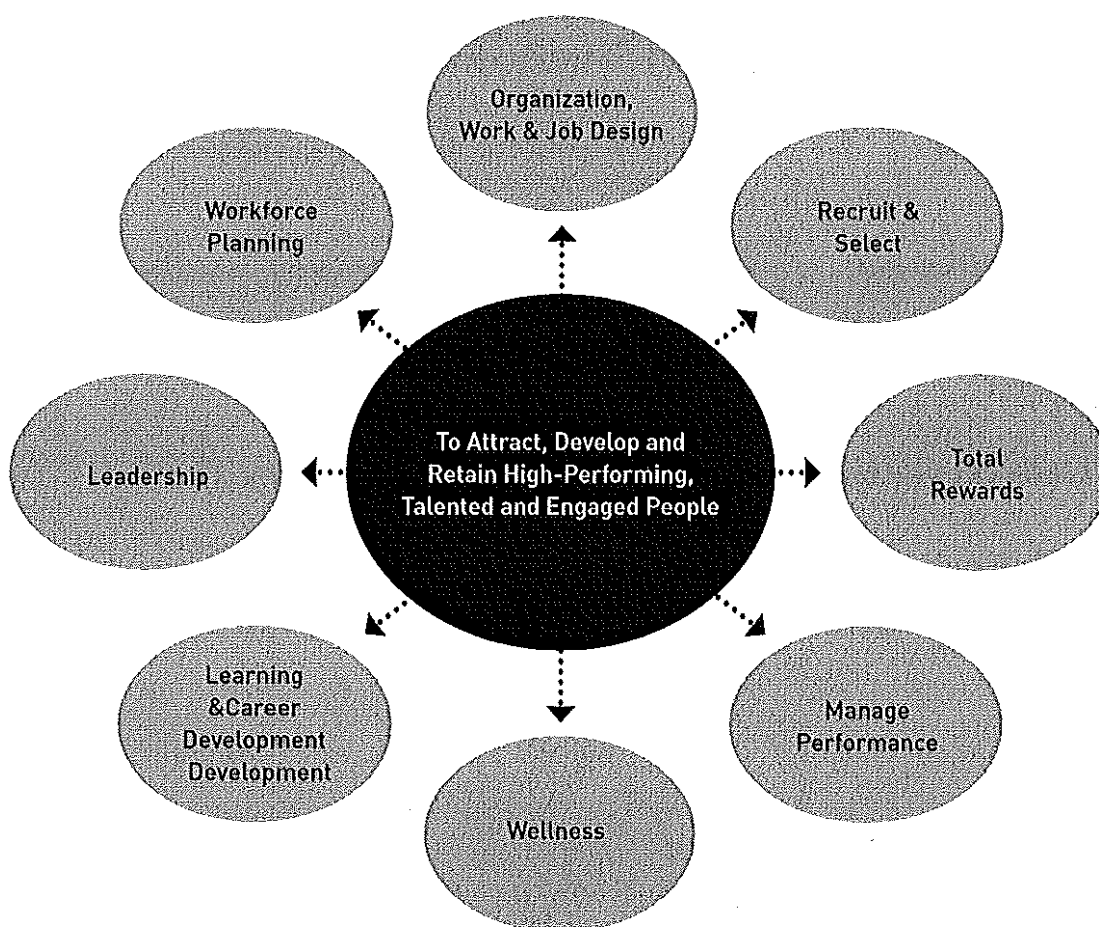
Each of the elements is briefly defined below.

Workforce Planning	Analyze, forecast, and plan workforce needs.
Organization, Work, Job Design	Design organizational structures, how work gets done, and specific job profiles.
Recruit and Select	How and who to attract, assess, select and hire.
Total Rewards	Compensation structures, benefits, recognition, tangible rewards, time off provisions.
Manage Performance	Goal setting -- individual & team based, career planning, feedback mechanisms.
Wellness	Health, safety, work/life balance.
Learning & Career Development	Training, mentoring, career development.
Leadership	Leadership -- personal, team, organization.

5. THE HUMAN RESOURCE STRATEGY

Using the framework outlined in Section 4, the Industry has undertaken the process to develop an HR strategy in order to ensure there is superior talent over the long-term, enabling the Industry in BC to capture a significant share of growth forecasted worldwide.

5.1   VISION

While the Industry has not yet committed to the development of an industry-wide business strategy, which would include a vision, mission, values, strategic goals, and plans, the following proposed high-level vision for the BC Industry serves as an anchor for the HR Strategy:

BC Screen-based Media is a worldwide leader in high value screen-based entertainment.

5.2   MISSION

The Committee has adopted the following long-term mission for this Human Resource Strategy:

To attract, develop, and retain high performing, talented, and engaged people.

While some of the sectors in the industry do not currently have challenges in attracting workers, with the forecasted shortage of labour due to demographic shifts, proactively promoting the industry and sourcing new entrants will be critically important in the future.

A strong commitment to development, both as part of the employment offer, and to enable new skills, is fundamental for this industry.

A focus on retaining workers within the BC industry has also been identified as important by the Committee. There is worldwide competition for the talent, and with the growth prospects in the industry and the cost to replace, high-performing people, access to talent will be a critical success factor.

A high-performing workforce that is passionate and engaged – that works every day to go 'above and beyond' – will set BC apart from other jurisdictions in screen-based media.

5.3   PRINCIPLES

Principles that have been kept in mind in designing this Strategy include the following:

- Learning from past experiences (e.g. lessons learned from the BC Institute of Film Professionals);
- Transferability of skills and talent across the 3 sectors (i.e. facilitating cross-sector labour mobility and developing an industry-wide pool of talent);
- Systematization of effective practices (building on "one-off" successes to expand sector- and industry-wide);
- A comprehensive approach (in the long-term adopting and implementing a wide range of HR strategies across all sectors and key occupational categories and skill sets);
- More systematically supporting women in the screen-based media industry, and generally fostering workforce diversity;
- Adapting to technological change through workforce training, supporting worker transition, and adjusting work flows;

- On-going short- and long-term business and HR planning industry-wide and within each sector.

5.4   GOALS

The goals below represent the high-level priorities that the Committee believes are most critical to respond to key challenges facing the industry now, while supporting the long-term mission *to attract, develop, and retain high performing, talented and engaged people.*

The Goals are:

1. Identify and implement a mechanism to lead the human resource strategy.
2. Plan for immediate and long-term workforce needs.
3. Attract, recruit and retain the best talent.
4. Enhance current and develop new education and training programs.
5. Develop and promote career paths and enable career development
6. Strengthen industry leadership capacity.

While this Strategy focuses on cross-sector initiatives, it is recognized that individual strategies will be needed to address specific sectoral issues.

Each goal is discussed below, including the current challenges and issues being experienced, and potential strategies to achieve the goal.

GOAL 1- IDENTIFY & IMPLEMENT A MECHANISM TO LEAD THE HUMAN RESOURCE STRATEGY.

The purpose of this goal is to ensure there is an entity in place to oversee, lead, champion, and coordinate the implementation of the HR Strategy among the various stakeholders in the Industry.

CHALLENGES AND ISSUES

- The employment structures in the Industry are complex and diverse. There is no centralized or existing group that adequately coordinates all interests. The Industry is comprised of three sectors with a multitude of employers ranging from large (over 1000 employees) to small (1 to 5 employees). Much of the talent in the workforce is freelancers, or persons on contract to organizations to provide service.
- Moving forward on the priority goals will require significant effort from many stakeholders and with many partners. Resources and funding will need to be identified for each goal priority, and progress tracked and reported to Industry.
- Developing a sustainable business model and tangible industry commitment.

STRATEGIES

1.1 Establish an industry-driven sector body (i.e. an HR Sector Council) by building on existing industry groups to be responsible for leading and coordinating the HR strategy. It could be part of an existing organization such as BC Film or other industry groups.

    1.1.1 Develop a business case for creation of the sector body.
    1.1.2 Initiate discussions with the Ministry of Jobs, Tourism and Innovation, and the Ministry of Community, Sport and Cultural Development.
    1.1.3 Create an Industry Education and Training Advisory Committee, to advance the needs of the industry and maintain dialogue with the Ministry of Jobs, Tourism and Innovation, Ministry of Advanced Education, and the education institutions. This will also support Goal 4.

1.2 Identify and pursue possible funding sources for implementation of the HR Strategy (from employers, unions, and government), including developing a viable business model in the long-term.

GOAL 2 - PLAN FOR IMMEDIATE AND LONG-TERM WORKFORCE NEEDS.

The emphasis of this goal is to ensure that the industry takes a long-term approach to identifying future human resource needs based upon its business strategy, and to ensure the right people with the right skills are in the right roles when needed. There are also opportunities for the industry to seize in the immediate/short term.

CHALLENGES & ISSUES

- Workforce planning is not being done at the industry and sector levels. This is due to a lack of understanding of an appropriate Industry definition, identification of key occupations, scope and size of the Industry, and a methodology for data collection.
- The project-based nature of the business, and the complexity and number of employment structures across all Sectors, makes it challenging to gather and compare data.
- Lack of an industry-wide strategic business plan endorsed by industry and government.

STRATEGIES

2.1   Advocate for improved Labour Market Information (LMI) for the Industry

    2.1.1   Identify key data metrics

    2.1.2   Engage with Statistics Canada to develop effective measurement tools that benefits both government and Industry. Engage with Statistics Canada and BC Stats to explore possibility of creating a 'satellite' Industry category.

    2.1.3   Engage the Ministry of Jobs, Tourism and Innovation and the Ministry of Community, Sports and Culture in developing short-term improvements in screen-based media specific LMI.

    2.1.4   Influence the collection of data at the BC and federal level

2.2   Undertake an engagement survey process to better understand key drivers of workers' needs and levels of engagement.

2.3   Develop transition planning for key positions/people in the Industry

    2.3.1   Identify key positions and people in each sector that are most at risk of job loss due to changes in technology.

    2.3.2   Identify jobs and individuals that would be candidates for retraining, transitioning and upgrading into other jobs within sectors or across sectors.

2.4   Develop succession plans to transfer critical knowledge from 'near to retirement' workers

    2.4.1   Identify critical roles across the sectors

    2.4.2   Identify individuals in critical roles that are nearing retirement

    2.4.3   Assess knowledge that needs to be transferred to others in the sector

    2.4.4   Develop mechanisms to transfer knowledge

2.5   Develop workforce plans that forecast future workforce requirements (numbers, skills, etc.), analyze current workforce data, and identify gaps that need to be addressed.

GOAL 3 – ATTRACT, RECRUIT AND RETAIN THE BEST TALENT.

This goal includes the human resource practices related to promoting employment and careers in the industry, to acquiring high-performing talent for employers, and ensuring there is a pool of talent in BC necessary to draw on as projects emerge.

CHALLENGES & ISSUES

- Shortage of people for critical roles.
- Lack of senior talent in some sectors of the industry.
- Insufficient depth of talent to meet Industry growth forecasts.
- Sub-optimal marketing of employment and careers in the Industry.
- Disconnect between Industry and training providers on career promotion.
- Uncertainty about long-term employment (i.e. subject to project-based work, cycles, volatility).
- Immigration process is slow & focuses too much on educational qualifications.
- Immigration and foreign worker options have not been fully explored and pursued; and international recruitment is expensive.
- Employers are poaching from one another – both between and within sectors.
- Lack of an explicit value proposition for BC industry – what does BC offer (i.e. competitiveness in attracting qualified talent)?
- Lack of assessment tools to hire the most qualified talent.

STRATEGIES

3.1   Develop an employment brand for the industry and region that is compelling to the labour market and promotes the positive aspects of working in BC.

3.2   Develop a marketing strategy to promote the employment brand and opportunities in the Industry.

    3.2.1   Use social media extensively to connect with younger generations

3.3   Actively recruit superior and senior talent to Vancouver.

3.4   In occupations where gaps exist, advocate that government consider easing residency requirements in longer term employment opportunities for foreign workers.

3.5   Build a larger pool of talent.

    3.5.1   Encourage the training and employment of Aboriginal people and visible minorities.
    3.5.2   Conduct further focused research on increasing the employment and retention of women.

3.6   Share information about best practices, projects/activities/resources among industry stakeholders so that key resources can be shared and retained within the industry.

3.7   Advocate for immigration policies that enable industry to expeditiously import skilled workers in specialized technical and creative job categories.

3.8   Explore in the longer term other immigrant and foreign worker recruitment strategies (e.g. International students, Working Holiday Program, etc.)

GOAL 4 – DEVELOP TALENT BY ENHANCING CURRENT AND CREATING NEW EDUCATION AND TRAINING PROGRAMS.

This goal encompasses practices that ensure that the industry, across all sectors and at all levels (industry, sectors, and organizational) is developing the creative, management and technical talent to meet current and future business requirements. The industry will work with training institutions to ensure this goal is industry-led.

CHALLENGES & ISSUES

- Educational programs in BC do not always meet the needs of the industry.
- A large number of public and private institutions, and related industry programs exist, therefore creating challenges to effectively engage them.
- Lack of clear, consistent communication/feedback channels between the Industry and post-secondary institutions and schools.
- Existing programs are often developed without the adequate involvement of experienced senior people from the industry.
- Currently, all sectors are looking beyond BC's public and private educational institutions in BC to fill vacancies.
- Perception that schools in Eastern Canada and the US are producing higher skilled graduates.
- Graduating students are often not 'job ready' because existing programs have little or no practical training component.
- Due to the significant proportion of freelance workers in some sectors, access to training and educational funding is limited or non-existent.
- Educational programs both within BC and elsewhere adhere to different occupational and program standards.

STRATEGIES

4.1   Review and influence the enhancement of existing learning programs:

    4.1.1   Compare and assess existing BC programs against world class programs in other jurisdictions identifying best practices and gaps.

    4.1.2   With support of the Ministry of Advanced Education and the Ministry of Jobs, Tourism and Innovation, encourage education institutions to be world-class leaders in education in this Industry.

    4.1.3   Review training offered through unions/guilds to ensure programs are comprehensive and current.

    4.1.4   Work with the provincial government and the post-secondary educators to create industry-appropriate Classification of Instructional Program (CIP) codes.

4.2   Work with the post-secondary education system to create new training for critical occupations within the Industry.

4.3 Pursue new approaches to training in order to ensure curriculum matches work and skill requirements as technology evolves.

    4.3.1 Consider the creation of an 'incubator' studio environment (e.g. Sundance or CFC) that would not only drive superior emerging creative talent and become a foundation resource for the Industry but drive research and development of new technologies, methodologies, and processes in entertainment.

    4.3.2 Collaborate on creating one-of-a-kind leading edge conferences that would showcase new technologies and emerging works that would draw new talent to BC.

    4.3.3 Create a cross-sector employers' forum for dialogue in order to share knowledge of successful strategies as well as create cross sector opportunities for high potential individuals who would benefit from deeper understanding of the intersection points between the Sectors.

4.4 Develop comprehensive mentoring, job shadowing, and work experience programs so that new recruits into the industry as well as employers are able to assess their suitability and fit, as well as expedite the time from 'new' to 'fully performing'.

4.5 Develop a proposal for increased government incentives to support worker training including freelancers (e.g. training and development grants and tax credits to employers, funding to individuals for self directed learning).

4.6 Reward and recognize senior players in the Industry for participating in mentoring programs.

4.7 Partner with educational institutions and government to expand and improve access to pre-employment training to individuals interested in the Industry.

4.8 Partner with the Ministry of Education to advocate for the development and inclusion of industry-related content in the K-12 curriculum as a means of ensuring long-term growth of creative and technological talent within the province.

4.9 Assist the reskilling/retraining of individuals identified in positions at risk of job loss due to changes in technology. (See 2.3.1 and 2.3.2)

In addition, Strategy 1.1.3 – forming an Industry Education and Training Advisory Committee - will support achievement of this objective.

GOAL 5 – DEVELOP CAREER PATHS AND ENABLE CAREER DEVELOPMENT.

This goal includes the structures and pathways that support the development of careers within the industry as people enter and gain experience. It also includes how jobs and career paths evolve as advancements in technologies impact work in the industry.

This is both a "reality and perception" issue. In some cases career pathways exist but need to be clarified and promoted; in the case of other occupations, pathways need to be developed by filling gaps and "connecting the dots", and then promoted.

CHALLENGES & ISSUES

- Lack of career paths from one job to another.
- Lack of awareness of career options for both external labour market and workers in the Industry.
- Lack of career development activities occurring within the Industry.
- Need to understand/be ahead of the curve on how technology change affects jobs.
- Jobs are project-based which limits opportunities to pursue careers, makes retention a challenge and increases risk of losing investments in workers.
- Qualifications for jobs are not standardized/agreed upon.
- Significant amount of work is freelance which limits career advancement.

STRATEGIES

5.1 Develop 'agreed to' standards for jobs as defined by Industry (e.g. creative, technical, above the line, below the line, management, etc.).

5.2 Define junior, mid, and senior levels for jobs enabling skill development & career progression, while ensuring entrepreneurship & flexibility is maintained.

5.3 Create opportunities for lateral movement between jobs.

5.4 Create clear pathways within and between job families.

5.5 Provide support (education programs, experience opportunities, mentorship) for employees to develop their careers.

5.6 Communicate and promote careers within the industry to the current workforce as well as the external labour market.

5.7 Develop and implement a strategy to create awareness of careers in the Industry in the K-12 education system.

GOAL 6 - STRENGTHEN INDUSTRY LEADERSHIP CAPACITY.

This goal includes ensuring that the Industry, across all sectors and at all levels (industry, sector, and organizationally) has the leadership capacity to ensure the industry is a world leader.

CHALLENGES & ISSUES

- Gaps in executive leadership skills in the area of policy, business, marketing and negotiating can make it challenging to compete with large multi-national companies for business.
- Gaps in leadership and management skills within organizations create challenges in leading project teams and employee relations.
- Significant portions of the industry (all sectors) are small organizations that have minimal opportunities for people to develop leadership and managerial skills.
- Lack of clearly defined leadership responsibilities within some jobs that have responsibility for leading teams.
- Promotions to higher-level positions with sectors are largely based on an individual's rise through the technical ranks and not based on leadership aptitude and skills.

STRATEGIES

6.1   Identify leadership requirements for key positions and gaps.

6.2   Research and implement educational opportunities for individuals with leadership potential through adapting existing programs and developing new ones.

    6.2.1   Implement a sector-specific mentoring program, including the identification of mentors and mentees.

    6.2.2   Liaise with educational institutions to create an industry/sector management program for junior incumbents.

    6.2.3   Implement an executive coaching program for existing and potential executives.

    6.2.4   Create cross-sector management internship programs.

6. MOVING FORWARD

6.1   STRATEGY IMPLEMENTATION – NEXT STEPS

The Committee has agreed to this HR Strategy and identified the priority goals and strategies for the industry. Subsequently, the industry has provided feedback on a draft Strategy and endorsed it with minor changes.

Now that the HR Strategy is finalized and is supported by the industry, more detailed action plans, including clear accountabilities, timelines, and performance measures/ targets will need to be created as part of the implementation planning phase of this project. The following high-level steps will be taken as part of an implementation-planning phase:

1. Industry leaders who will champion the strategy will be confirmed.
2. Meetings will be held with Provincial government officials to obtain their support for an Industry HR Sector Council as part of an existing organization(s), to lead the implementation of the HR Strategy.
3. Sources of funding to implement the HR Strategy will be identified.
4. The HR Sector Council that will take lead responsibility for strategy implementation and oversight will be created. On a transitional basis, the entity could be the Screen-Based Media Human Resources Committee.
5. Detailed implementation planning will be initiated, led by the HR Sector Council. This step will include detailed project plans for each strategic initiative. The project plans would identify roles and accountabilities, timelines, resources, specific actions, and key measures to move forward on the strategies within each strategic objective.

Simultaneous with next steps on an industry HR Strategy, we strongly urge industry groups and governments to work together and develop an industry-wide business strategy.

6.2   IMMEDIATE/SHORT-TERM PRIORITIES

With the release of this Human Resource Strategy, the Committee will pursue the following immediate or short-term actions:

1. Establish an interim Screen-Based Media HR Council, administratively linked to/ supported by BC Film, including a transition plan for the creation of a permanent Council.
2. Hold a meeting with senior representatives of public and private post-secondary education institutions; after which, develop and implement a terms of reference for a Screen-Based Media Industry-Education Council to advise the HR Council on post-secondary matters.
3. Work with industry associations and Vancouver Economic Development Commission to develop a web-based source for industry and employment information.
4. Meet with the Ministry of Jobs, Tourism and Innovation to develop the terms of reference for a project to develop a value-added labour market profile of the BC screen-based media industry; subsequently implement the project.

5. Meet with Statistics Canada and BC Stats to start a process for modifying national industry and occupational classifications to better reflect the BC screen based media industry.

6. Meet with the Ministry of Jobs, Tourism and Innovation and industry associations to identify an action plan for streamlining foreign worker programs/processes (i.e. Temporary Foreign Worker Program, Federal Skilled Worker Program and Provincial Nominee Program) for employers in the Animation & VFX and Video Game sectors.

6.3 STRATEGY OUTCOMES

By achieving the following outcomes, this Human Resource Strategy will support the growth and competitiveness of BC's screen-based media industry by increasing the talent quantity and quality in BC. Specifically, it will:

- Improve cooperation between industry sectors and the ongoing sharing of best practices;
- Increase the number and diversity of people choosing Screen-based Media as a career;
- Increase the number and diversity of people completing industry-focused education programs and being hired into roles within the Industry;
- Assist employers and unions to embrace technological change so that work processes and jobs continually evolve to meet industry needs;
- Ensure highly skilled workers are available to fill critical positions;
- Establish BC as the jurisdiction of choice for productions because of its superior creative, technical and managerial talent.

6.4 CONCLUSION

Each of the sectors of the screen-based media industry in BC has had significant levels of success, and is seen as competitive leaders within their own markets. While there are many reasons for these successes, one that has greatly contributed in all three sectors is the **talent** of their workforces.

Advances in digital media technology are driving the convergence of the Film & TV, Animation & VFX, and Games businesses. As well as the challenge of an increasingly critical need for access to a highly skilled and engaged talent pool, the sectors share a rare opportunity to collaborate. By leveraging their creativity and taking action ahead of other competitors, they will increase their chances of continuing to have a highly skilled talent pool to meet current demands for talent as well as meet the growth projections for the Industry.

Through successful planning, developing and implementing the strategies within this shared HR Strategy for the Screen-based Media Industry in BC, the industry will continue to be recognized as a significant player within each of the three sectors; and ultimately has the potential to leverage itself as one of the world leaders in the production of screen-based entertainment.

It's all about the talent...

While some may question the cost of this investment, the Strategy suggests the cost of not taking collective action will be much higher.