

**Jacobson Consulting Inc.**

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# **Jacobson Consulting Inc.**

## **Corporate Profile**

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# Jacobson Consulting Inc.

## ABOUT JCI

As owner of Jacobson Consulting Inc., Paul Jacobson has over 35 years of experience as a consultant. Jacobson Consulting was founded by Paul Jacobson in 1992, after 20 years of experience with Informetrica Limited in Ottawa, to provide consulting services to business and government. Areas of emphasis have included labour economics, industrial studies, health economics, model building and forecasting.

## PAUL M. JACOBSON – PRESIDENT JCI

### *EDUCATION*

- M.A., Economics, Queen's University (1973)
- B.A., Economics, McMaster University (1971)

### *PROFESSIONAL PROFILE*

- February 1993 — commenced private practice as principal of Jacobson Consulting Inc.
- May 1973 – January 1993 — a senior consultant at Informetrica Limited, positions included:
  - Director, Research Projects Group
  - Chief, Regional Industrial Analysis Group
  - Chief, Quantitative Applications Group
- At Informetrica, Mr. Jacobson's responsibilities included the management of consulting activities, various forecasting services and model development.

## VENDOR INFORMATION - JACOBSON CONSULTING INC.

Paul M. Jacobson, President  
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Private Ontario Corporation incorporated November 26, 1992 with Ontario Corporation Number 1004186

Website: [www.jacobsonconsulting.com](http://www.jacobsonconsulting.com)

## RECENT INDUSTRIAL EXPERIENCE

Mr. Jacobson has substantial experience with the preparation of industry studies. Assignments relative to various industry studies, particularly the distributive trades and manufacturing, for Industry Canada, HRSDC and the Retail Council were undertaken since the inception of the firm. Specific details of these projects are available on request. Many of

the industrial studies involve specific consideration of the strengths, weakness, opportunities or threats faced by the sector.

In 2005, Mr. Jacobson completed a study on the structure of the retail sector that incorporated Labour Force Survey (LFS) analysis as well as Workplace and Employee Survey (WES) data. The latter study is available on Industry Canada's web site. In 2005-8, Mr. Jacobson was involved in several studies for Industry Canada looking at the role of specific service-sector occupations in the industrial structure of Canada and the U.S. as well as purchased services in a number of countries. The initial study focussed on the broad range of service inputs to manufacturing.

In 2007, Mr. Jacobson finished work with Industry Canada on a study of the industrial design function in the economy. In 2007, Mr. Jacobson completed a study of the EI Illness benefit for HRSDC involving WES and Survey of Labour Income Dynamics (SLID) data.

In 2008, Mr. Jacobson completed data studies for the Retail Council of Canada and also developed a methodology for estimating the contribution of aboriginal workers to GDP for Indian and Northern Affairs Canada.

In 2009, Mr. Jacobson completed a study on knowledge-intensive activities in Canadian industries for Industry Canada. For HRSDC and the Retail Council in 2009, in conjunction with the Innovative Research Group, Mr. Jacobson completed a study on the workplace environment for retail. Mr. Jacobson continues to provide statistical support and data products for the Retail Council. In 2010, this included continued supply of the statistical publication Retail Fast Facts as well development of detailed provincial statistical material.

## HEALTH AND SOCIAL SERVICES PROJECTS

In 2006, Mr. Jacobson completed studies on chronic disease issues for Health Canada. He led a study on Aboriginal chronic care approaches focussing on approaches tried in other jurisdictions including the US, Australia and New Zealand. He authored a study dealing specifically with Aboriginal diabetes for Health Canada.

In 2007, Mr. Jacobson completed a study for Alberta Health and Wellness on measuring healthcare productivity. In 2007, Mr. Jacobson completed a study of the EI Illness benefit for HRSDC involving WES and Survey of Labour Income Dynamics (SLID) data. In 2008, Mr. Jacobson prepared a report on the feasibility of evaluating a Chronic Obstructive Pulmonary Disease (COPD) program for the North of 60.

In 2008, Mr. Jacobson completed a literature and data review on chronic disease and disability trends for a consortium of rehabilitation hospitals in Toronto. This paper explicitly looked at chronic disease, injury and key disease trends for the Toronto area that would impact the demand for rehabilitation services.

In 2009, the major LHIN strategic study, by JCI, was utilized as input to the Integrated Health Services Plan. It highlighted key service trends in TC LHIN and identified strategic issues for the LHIN including the high patient inflows. Planning and funding challenges as well as issues of equity and accountability were also studied in the report. In addition, TC LHIN commissioned JCI to prepare a paper summarizing some European trends in integrated health care to inform discussions within the LHIN about integrated care and care management.

As well as the projects outlined above, during 2009, Mr. Jacobson, as a subcontractor to Informetrica Limited, created an economic cost projection model for diabetes mellitus.

In 2010, Mr. Jacobson collaborated with Informetrica Limited to develop a funding model for the Child Welfare Sector in Ontario.

Earlier health care projects include reviews of health care funding and sustainability for provincial governments, value for money studies for a provincial government, reviews of chronic disease management issues and other strategic questions for a major complex continuing care facility in Toronto.

## PUBLICATIONS

Mr. Jacobson has published two articles on health care policy and insurance in *Policy Options* (August 2004, September 2005). One of his recent retail industry studies is available on the Industry Canada web site.<sup>1</sup> Links to this material are on the JCI web site. The web site also contains recent reports prepared for the Toronto Central LHIN, and for the Retail Council.<sup>2</sup>

## AREAS OF EXPERTISE

Paul M. Jacobson, President of Jacobson Consulting Inc. has more than 35 years of professional experience as an economist and consultant. Among other responsibilities, he led policy-related consulting studies for Informetrica Limited in Ottawa for the first 20 years of his career before creating an independent practice to facilitate a move to Toronto.

## *PLANNING AND POLICY ANALYSIS*

Many of Mr. Jacobson's assignments have been directed at specific policies. For example, in 2006, Mr. Jacobson analyses policy issues with respect to income replacement for long-term illness for HRSDC. In 2010, Mr. Jacobson analyzed the economic impact of a specific program for Indian and Northern Affairs. These studies all required the preparation of specific reports and presentation material. In 2007, Mr. Jacobson prepared a study of the measurement of health care productivity for the Alberta government and the results were presented at a seminar in Edmonton in 2008. In 2009, many of Mr. Jacobson's assignments were focussed on health care including a strategic planning report for the Toronto Central Local Health Integration network. In 2010, the policy studies included work on a funding model for child welfare in Ontario and the economic analysis of the residential schools settlement.

## *RESEARCH*

Mr. Jacobson's principal focus as a consultant has been on the delivery of specific research to support policy development and strategic planning. Recent analysis has focussed on two areas, health care and labour. In 2007, Mr. Jacobson prepared a study of the measurement

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<sup>1</sup> [http://www.ic.gc.ca/epic/site/retra-comde.nsf/en/h\\_qn00134e.html](http://www.ic.gc.ca/epic/site/retra-comde.nsf/en/h_qn00134e.html)

<sup>2</sup> [http://www.jacobsonconsulting.com/jver3/downloads/cat\\_view/24-selected-jci-articles](http://www.jacobsonconsulting.com/jver3/downloads/cat_view/24-selected-jci-articles)

of health care productivity for the Alberta government and the results were presented at a seminar in Edmonton in 2008. In 2008, Mr. Jacobson prepared a research report for the complex care hospitals in Toronto related to the requirements for the complex and rehabilitation care in Ontario. As noted above, Mr. Jacobson has undertaken methodological research on the estimation of the contribution to GDP of aboriginal workers as well as a number of detailed studies of the role that key service activities and occupations play in the Canadian economy. The latter work was undertaken for Industry Canada.

Over the years, Mr. Jacobson has created many statistical studies and presentations for the Retail Council of Canada. The most recent in 2009, focussing in detail on the structure of the retail labour market, was prepared for an RCC project sponsored by HRDC. The report is available on JCI's web site.

Mr. Jacobson also prepared research on the structure of retail labour markets in specific areas for a large legal firm and appeared numerous times as an expert witness in legal proceedings associated with that material.

Other research clients have included Citizenship and Immigration Canada, Health Canada as well as industrial clients such as INTERAC and the Offord Group.

All of these studies require a substantial knowledge of both statistical data and presentation. Mr. Jacobson regularly processes very large databases using various relational database systems as well as statistical software. Mr. Jacobson maintains current copies of a number of large Statistics Canada datasets including the major population surveys (SLID, CCHS, NPHS, GSS). Mr. Jacobson regularly commissions highly-detailed special tabulations from Statistics Canada, other government agencies as well as the authorities in other countries.

### *FORECASTING*

At Informetrica Limited for the first 20 years of his career, Mr. Jacobson led the development of the major forecasting models. He has undertaken numerous employment forecasting studies, many for the Canadian Occupational Projection system (COPS) work at HRDC and its successor departments. Some years ago, Mr. Jacobson completed a review of employment forecasting approaches for COPS.

Recent forecasting experience includes the development of an economic cost of diabetes model and forecast for the Canadian Diabetes Association as a subcontractor to Informetrica Limited in 2009. This model focussed on the costs to society and to the health care system of diabetes and its associated co-morbidities. Mr. Jacobson developed a substantial revision of this model with an expanded treatment of co-morbidities and social costs. The results of this work were presented as conference paper at the recent Canadian Association for Health Services and Policy Research (CAHSPR) conference in Toronto in May 2010. Currently, Mr. Jacobson is engaged in an economic forecasting study of a major aboriginal grant program using the Informetrica econometric model (TIM) as well as detailed Census tables.

### *STRATEGIC PLANNING*

Strategic planning requires a good environmental scan along with a thorough analysis of issues. Many of Mr. Jacobson's studies have been specifically oriented to strategic planning. Specifically, the work on chronic disease, integrated care and the strategic white paper

prepared for the Toronto Central LHIN contains very significant environmental scan components incorporating detailed literature and data reviews to identify key issues for the client. This study also required detailed interviews with senior executives in the health care sector in Toronto. This material is available on JCI's web site.<sup>3</sup>

## WORKING WITH JCI

### PROJECT MANAGEMENT

JCI maintains a public web site as well as a private secure web-based system for project management. The latter is based around the open-source PHProjekt system. The system was used for larger projects such as the one with Alberta Health and Wellness among other clients to provide secure exchange of files, notes and other project information as well as resource tracking.

### JCI GUIDING PRINCIPLES:

- Embrace a system/ province-wide perspective
- Adhere to evidence and best practices
- Design for sustainability of services and initiatives
- Define strategic options that can be realistically implemented within defined timeframes and resources available
- Leverage and align with existing initiatives to capitalize on their momentum and success
- Communicate broadly

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<sup>3</sup> [http://www.jacobsonconsulting.com/jver3/downloads/cat\\_view/24-selected-jci-articles](http://www.jacobsonconsulting.com/jver3/downloads/cat_view/24-selected-jci-articles)

## SELECTED RECENT PROJECT SUMMARY

Selected projects are outlined below with references. Details of other projects listed in Mr. Jacobson's CV are available on request.

Selected Projects for Paul Jacobson	
Organization	Description
Industry Canada - 2006	Services and Manufacturing
Industry Canada - 2006	The Logistics Role in the Canadian Economy
Industry Canada - 2007	Design Sector in the Canadian Economy
Industry Canada - 2009	The Role of Knowledge-Intensive Business Services As an Input to Other Sectors
Retail Council of Canada 2005 and ongoing	The Structure of Retail Trade in Canada in 2005 and ongoing statistical and data presentations
Retail Council/HRSDC - 2009	Retail Sector Statistical Overview – prepared as part of a broader situational overview with the Innovative Research Group
Commission for the Promotion of Sustainable Child Welfare - 2010	A Funding Model For Child Welfare – prepared in conjunction with Informetrica Limited
Indian and Northern Affairs - 2010	Indian Residential Schools Settlement Agreement: Economic Impact
Toronto Central LHIN 2009	Integrated Care Notes; A Discussion Document using European Examples to Inform Thinking on Integrated Care and Care Management - <a href="#">available on JCI web site</a> A paper summarizing some European trends in integrated health care to inform discussions within the LHIN about integrated care and care management
Toronto Central LHIN 2009	Strategy White Paper – <a href="#">available on JCI web site</a> The paper, a major LHIN strategic study, was utilized as input to the Integrated Health Services Plan. It highlighted key service trends in TC LHIN and identified strategic issues for the LHIN including the high patient inflows. Planning and funding challenges as well as issues of equity and accountability were also studied in the report.
Informetrica Limited for the Canadian Diabetic Association -2009	Economic Costs of Diabetes – A model was developed which forecast incidence and prevalence of diabetes and associated economic costs.
Toronto Rehab Hospitals - 2008	Rehabilitation and Complex Continuing Care - <a href="#">available on JCI web site</a> This paper was a literature and data review on chronic

	disease and disability trends for a consortium of rehabilitation hospitals in Toronto. This paper explicitly looked at chronic disease, injury and key disease trends for the Toronto area that would impact the demand for rehabilitation services
Alberta Health and Wellness – 2007	The study <i>Opportunities and Issues with Measuring Healthcare Performance and Productivity</i> focussed on the measurement of government productivity in the national accounts but also reviewed general performance measurement of government activities at the aggregate level.
Health Canada – Aboriginal Projects - 2006	JCI led a study entitled <i>Chronic Disease Prevention: A Review of the Effectiveness Literature</i> and sole authored a study entitled <i>Expanding the Understanding of the Impacts of Aboriginal Diabetes Prevention Activities</i> .
Health Canada 2008	Feasibility of Cost-Benefit Analysis of the Respiratory Health Framework in North of 60 Canada
Retail Council/HRSDC - 2009	Retail Sector Statistical Overview – prepared as part of a broader situational overview with the Innovative Research Group
HRSDC - 2006	An Analysis of the Relationship between Employment Insurance Illness Benefits and the Private Sector Options
Indian and Northern Affairs – Canada, 2008	A Methodology for Estimating the GDP Contributed By Aboriginal Workers in the Labour Force
Support to Strategic Planning – Bridgepoint Health (2004, 2005 and 2006)	This is an ongoing project to provide literature and trend analysis about processes, procedures and care trends relevant to Bridgepoint Health. Issues addressed have centered on Chronic Disease Management but have also covered quality and other issues.
Health Care Human Resource Modeling and Data Summary – prepared for Health Canada (ARAD) 2002	A review of employment forecasting data and literature relevant to health care human resource modeling.
Value-For-Money Review-Ontario Government 2001-2	participation in a comprehensive program review of Ontario government healthcare activities

## CURRICULUM VITAE— PAUL M. JACOBSON

### *EDUCATION*

Paul M. Jacobson, a consulting economist with more than 30 years experience in economics, econometrics and information processing

- M.A., Economics, Queen's University (1973)
- B.A., Economics, McMaster University (1971)

### *AREAS OF PRACTICE*

Health Economics	Labour economics
Industry analysis and models	Policy analysis
Demographics	Financial Modelling and Analysis
Social and health policy analysis and modelling	Forecasting
Econometric and Statistical Analysis	Software and Database Development
Regional Analysis	Taxation and General Government Policy
Policy and Program Evaluation	Input-output analysis
Value-For-Money Audits	

### *PREVIOUS CONSULTING ASSIGNMENTS*

Industry studies, market research, policy impact studies, economic impact analysis, software development

### *PREVIOUS CLIENTS*

Most major federal departments, crown corporations, private utilities and provincial departments in Ontario, Quebec, Alberta and other provinces

### *PROFESSIONAL PROFILE*

- February 1993 — commenced private practice as principal of Jacobson Consulting Inc.
- May 1973 – January 1993 — a senior consultant at Informetrica Limited, positions included:
- Director, Research Projects Group — management of:
  - the development of the national forecast,
  - all major Informetrica databases,
  - all of Informetrica's models,
  - policy studies, reference outlooks, and
  - the marketing and delivery of significant consulting projects
- Chief, Regional Industrial Analysis Group — management of:
  - the Provincial Forecast Service,
  - the Construction Forecast Service,
  - Canadian Capital Projects,
  - the development of Informetrica's Regional-Industrial Model, and
  - the marketing and delivery of significant consulting projects
- Chief, Quantitative Applications Group — management of:
  - all major Informetrica models and data services, and
  - many large consulting projects.

*SOME SELECTED PROJECTS*

- The following list of selected external consulting studies presents an overview of the experience of P.M. Jacobson:
  - A Funding Model For Child Welfare in Ontario
  - Indian Residential Schools Settlement Agreement: Economic Impact
  - Integrated Care Notes; A Discussion Document using European Examples to Inform Thinking on Integrated Care and Care Management
  - TC LHIN Strategy White Paper
  - Rehabilitation and Complex Continuing Care
  - The Role of Knowledge-Intensive Business Services As an Input to Other Sectors
  - A Methodology for Estimating the GDP Contributed By Aboriginal Workers in the Labour Force
  - Feasibility of Cost-Benefit Analysis of the Respiratory Health Framework in North of 60 Canada
  - Opportunities and Issues with Measuring Healthcare Performance and Productivity Health Expenditure Deflation
  - An Analysis of the Relationship between Employment Insurance Illness Benefits and the Private Sector Options
  - Design Sector in the Canadian Economy
  - Chronic Disease Prevention: A Review of the Effectiveness Literature
  - Expanding the Understanding of the Impacts of Aboriginal Diabetes Prevention Activities
  - The Logistics Role in the Canadian Economy
  - Services and Manufacturing
  - Strategic Planning with respect to Chronic Care
  - Review of Health Care Sustainability
  - Sector studies on retail trade
  - Study of Health Care Sustainability
  - Review of education and training evaluation plans
  - Human Resource Sector Council feasibility for Retail
  - Several policy and evaluation studies on immigration
  - Fraud, Waste and Abuse in the Health Care System
  - Value for Money analysis of segments of Ontario's health system
  - Health human resource demand
  - Health technology trends
  - Retail labour market analysis
  - Immigrant mobility and labour market activity
  - Labour market analysis
  - Comparison of international input-output tables
  - Analysis of potentials for employment projections
  - Automation of financial research
  - Small area market data for a financial product
  - Pricing decisions for a new communications technology
  - An analysis of selected issues of tax administration
  - Development of financial instrument models
  - An analysis of issues related to the enforcement of selected excise taxes
  - Employment impacts for a major environmental initiative
  - Employment impact of a new communications technology
  - Studies and forecasts of the market for electronic payment
  - Sector studies on wholesale and retail trade
  - Several studies on the demand for tobacco products and smoking trends and behaviour

- Sector studies on retail trade, infrastructure construction and the plastic-recycling sector
- An analysis of inter-provincial construction wage differentials
- An efficiency analysis of a departmental statistical data section
- An analysis of the tax implications of the underground economy
- An analysis of the determinants of consumer sentiment
- An analysis of federal government spending on tourism