



Rainforest Alberta Calgary 2021

2021 Scorecard Results and Report



Table of Contents

04	Key Takeaways
11	2021 Scorecard Results
14	Culture
18	Leaders
22	Policy & Infrastructure
26	Resources
30	Role Model
34	Engaged Activities
38	Diversity, Equity and Inclusion
55	Study Details
69	Appendix

PERCEPTIONS OF RAINFOREST

"Over 5 years Rainforest has inspired the entire province. The words innovation ecosystem exists because of Rainforest."

-Founder/Entrepreneur/Investor/Ecosystem Builder/Educator/Freelancer, More than 10 years

KEY TAKEAWAYS

Rainforest Alberta Calgary scored 661, with increased engagement from the ecosystem

Gaps identified in Culture allows for opportunities to improve

There was increased engagement from the ecosystem as the pool of respondents increased, many of which were new respondents (70% had not participated in the Scorecard last year).

The 2021 score dropped 23 points compared to 2020, which was largely driven by a decrease (-14 points) in the Culture pillar's score.

The main contributing issues that participants mentioned included a lack of acceptance around failure, and that outside of the broader tech community, there is a perceived lack of trust and collaboration. Culture scores were lower among Boomers, Women and those in the ecosystem less than 6 months.

KEY TAKEAWAYS

Ample room to increase funding & investment opportunities

Strong appetite for mentorship

Many have experienced and continue to see funding be a major challenge for start ups. Rigid application and funding processes can hinder access and growth for those in the start-up community. There is also a desire for more opportunities for earlier stage companies. Some noted that the pandemic also changed the landscape with many investors shifting to later stage funding instead of pre-seed capital.

Participants saw the value in connecting with role models for advice, however accessibility to this guidance and mentorship proved to be the biggest challenge. Infrastructure could be improved so that entrepreneurs looking for guidance know what mentorship programs are available and that they are well matched to mentors that meet their needs. This would help newcomers navigate the ecosystem and foster more opportunities for leaders to step into a mentorship role. See pages 41-43 in this report for more demographically specific mentorship recommendations related to diversity, equity and inclusion.

KEY TAKEAWAYS

Desire for a central repository of resources

With so many avenues available, participants found it challenging to know which source was the best fit for their needs. This could often be frustrating and overwhelming. Many felt the ecosystem was not clearly mapped out, and that the dissemination of information was often reliant on word of mouth and dependent on one's own network. *"You need to know someone in the ecosystem to grow within it, otherwise it's harder to know what's available."* Conducting more research among the ecosystem will provide insights on what resonates most with participants and what they will find useful and relevant in this repository.

KEY TAKEAWAYS

Growing & Attracting Talent

There is a need to develop and leverage junior talent so they continue to grow and stay within the Alberta community. Many noted rigid hiring processes that focus mainly on experience and credentials are barriers to growing talent among new grads.

Companies are especially feeling the shortage of senior tech talent in the community. Challenges in attracting talent from outside of the province was due to the highly competitive marketplace, and linked to lack of capital in the ecosystem. While many see the expansive changes happening in Calgary's ecosystem (e.g., Platform Innovation Centre) as a welcome start, the view is that more can be done to attract "world class" talent to our doors.

KEY TAKEAWAYS

The critical importance of Diversity, Equity and Inclusion

Diversity, equity and inclusion are critical to both the success of the ecosystem and the individual. Key recommendations include:

- Connect those with extensive experience with newcomers to help navigate the ecosystem. Mentorship and training programs would benefit developing skillsets, networks and perspectives of both parties.
- Ensure equitable representation, which allows for innovation and profitability by leveraging diversity of thought and unlocking new markets.
- Nurture psychological safety, which is a key component to building inclusive and innovative ecosystems.

KEY TAKEAWAYS

The start-up community welcomes more support on the challenges surfaced in this report

Examples include:

- Desire for Rainforest to work with organizations to reduce barriers to government funding opportunities
- Resource repository that maps out the ecosystem (e.g., key players, tools, events etc.)
- Developing and increasing visibility of mentorship, and skills programs
 - Suggestions for partnership (such as InceptionU or the General Assembly Canada to help support displaced workers or individuals looking to up-skill their teams)
- Accessibility to connect or learn from thought leaders and role models in the community (e.g., in-person networking, speaking engagements and events)
- Increase awareness on what's happening in the ecosystem through better communication and targeted marketing, especially for entrepreneurs new to the ecosystem

PERCEPTIONS OF RAINFOREST

"Rainforest has been a great movement and driver for ecosystem development in Alberta - it's a slow wheel to turn but we're getting there."

-Founder/Entrepreneur/Startup Employee/Team Member/Ecosystem Builder, More than 10 years

2021 SCORECARD RESULTS

661 / 1000

Overall score across all pillars

- Culture: 212/300 (71%)
- Leaders: 131/200 (66%)
- Policy & Infrastructure: 89/150 (59%)
- Resources: 92/150 (61%)
- Role Model: 67/100 (67%)
- Engaged Activities: 69/100 (69%)



-23 points

since 2020, largely driven by decrease in Culture score (-14 pts)



+218 participants

70% new respondents in 2021



172 surveys

+57 more surveys completed compared to last year

MEASURING THE PILLARS

When considering creating a lasting iteration of the Scorecard that would provide valuable data, it was imperative that the pillars of the ecosystem, as defined through the historic work of Rainforest Alberta, were maintained.

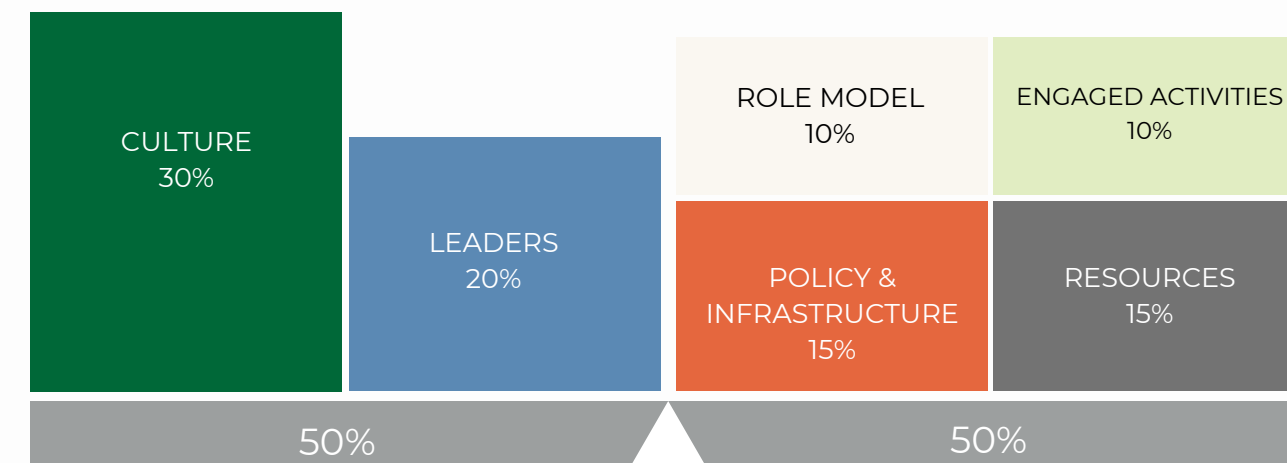
There are six pillars that make up the ecosystem. Like any natural ecosystem, having the right balance is crucial. The index is measured on a scale of 1,000 with each pillar weighted differently.

The Scorecard is a snapshot of the ecosystem in time, describing its strengths, weaknesses, and general condition.

An honest examination of the ecosystem's assets, through the Scorecard Assessment, works to identify opportunities to improve the culture of innovation in Calgary.

The Scorecard asks a series of questions within each pillar which have been thoughtfully adapted from the historical versions of the survey.

Respondents are asked to answer each question on a scale of 0-10 with 0 meaning "I see this less often" and 10 being "I see this all the time" in the ecosystem. Qualitative data is also collected for each pillar via a comment section.



PILLARS 2021 SCORECARD RESULTS

Culture

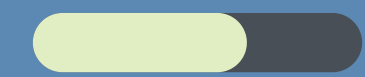
212/300



-14 points

Leaders

131/200



-2 points

Policy & Infrastructure

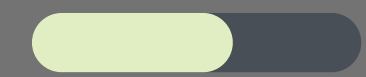
89/150



-2 points

Resources

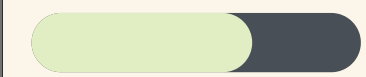
92/150



-2 points

Role Model

67/100



-5 points

Engaged Activities

69/100



no change

Culture

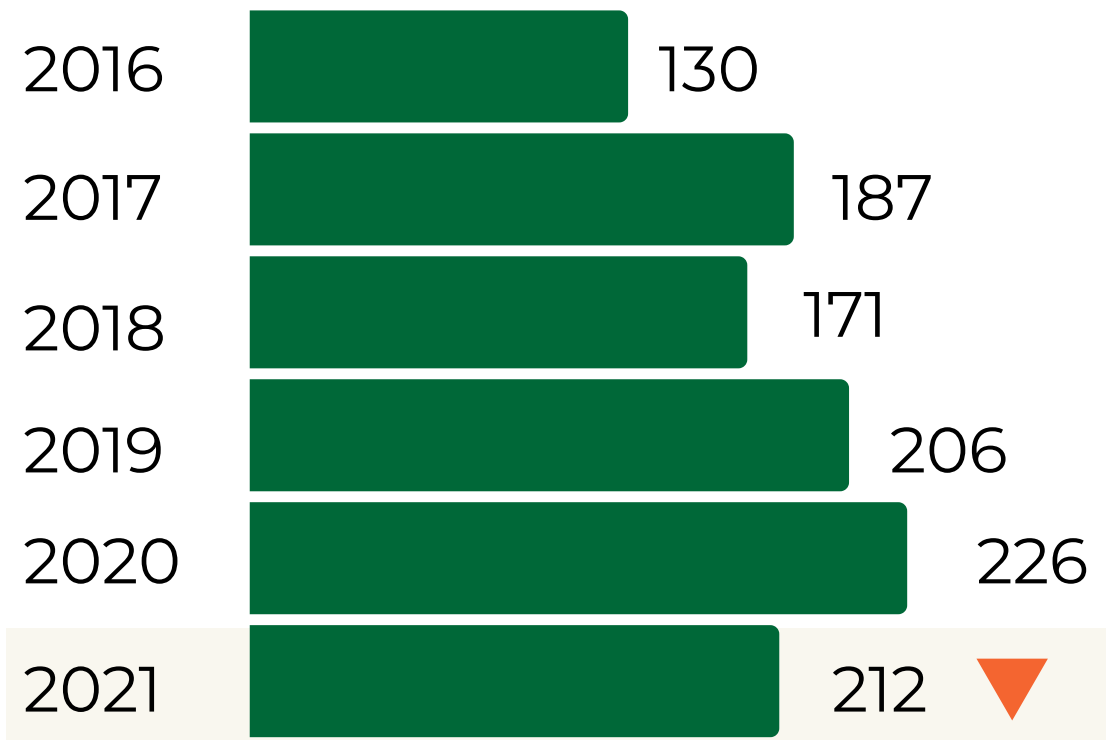
212/300



-14 points

Culture is the foundation of any innovation ecosystem. It is the shared values and actions of ecosystem members which ultimately determine the success of ecosystem initiatives.

YEAR OVER YEAR TRACKING



SUBGROUP DIFFERENCES

New to ecosystem (6-18 months) rated Culture higher (234/300)

CONTRIBUTING THEMES



Failure



Diversity & Inclusion




Trust & Collaboration



Lagging investment culture

Culture

212/300



-14 points

Culture

212/300



-14 points



Failure

Overall, the comments indicated that failure is talked about in the ecosystem but not always accepted in practice, particularly in industries that are not core-tech.



Trust and Collaboration

Thoughts on trust and collaboration were discussed in great detail by respondents. While some commented on improved trust and collaboration over the last 5 years, others shared that the culture of trust is not shared beyond the broader tech community. Trust was lower among Boomers, Indigenous, South Asians, and people that preferred not to disclose their age, sexual orientation or gender information.



Diversity and Inclusion

In relation to comments made around DEI, the sense is that the ecosystem is welcoming but not as diverse and inclusive as it needs be. Comments directly related to the Scorecard Assessment included gratitude for "the forethought and aligning with some [DEI] norms that should be accepted by all".



Lagging investment culture

Lack of helpfulness and perceived higher criticality from VCs was highlighted as an issue. There is a desire to for more funding opportunities for earlier stage companies.

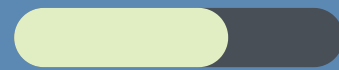
CULTURE

"There is such a high risk aversion culture that few would even admit to failure even though we know that failure within start-ups is probably the only way they learn."

- Founder/Investor, Less than 6 months

Leaders

131/200

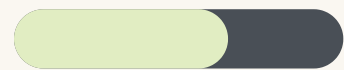


-2 points

Leaders, both formal and informal, are decision makers positioned to realize potential, convey perspectives, and rally groups to influence outcomes for innovation.

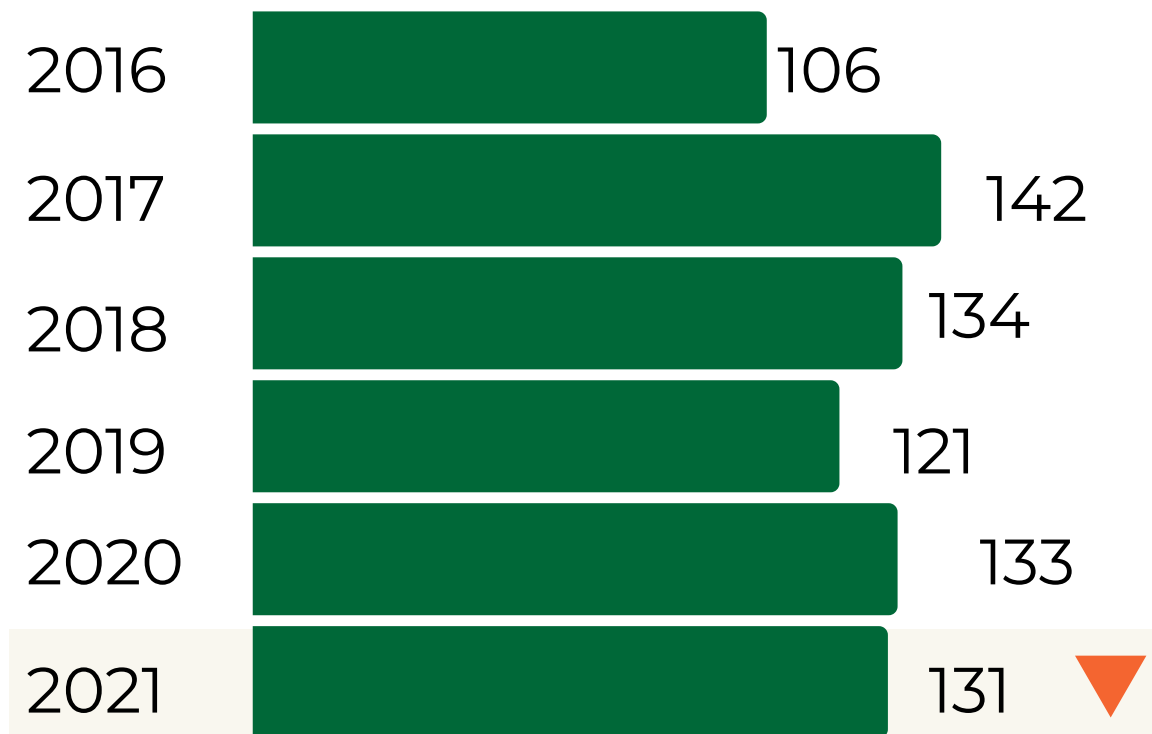
Leaders

131/200



-2 points

YEAR OVER YEAR TRACKING



SUBGROUP DIFFERENCES

Students and those with learning disabilities rated Leaders higher (145/200)

Non-binary/gender nonconforming rated Leaders lower (117/200)

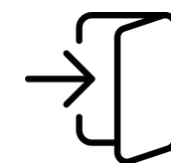
CONTRIBUTING THEMES



Quality



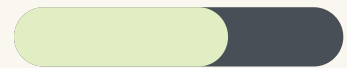
Diversity



Accessibility

Leaders

131/200

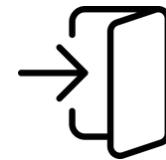


-2 points



Support from Leadership

Perspectives on the quality of leadership ranged from "good leaders" to "leaders not always synonymous with someone I'd look to for advice". Limited resourcing and lack of support from the government was thought to be a potential reason for challenges.



Awareness and Accessibility

Participants mentioned it being challenging to know who the thought leaders are in Alberta. Some found it challenging to connect with leaders especially those who are perceived to be actively gatekeeping newcomers from joining the community because it's the "old boys club".



Diversity

While some have seen improvements in the visible diversity of ecosystem leadership, many agree that there is still a long way to go. Especially more representation of racialized people, women and younger generations within leadership roles. Further, with the perceived shortage of experienced leaders, many felt this could result in an "echo chamber" and be limiting to diversity of thought.

LEADERS

"Alberta has a shortage of experienced founders, and the leaders tend to be on multiple ecosystem boards, limiting diversity of thought."

- Founder/Entrepreneur/Investor/Ecosystem Builder/Startup Service Provider, More than 10 years

Policy & Infrastructure 89/150



-2 points

Policy and Infrastructure is the infinite, non-depleting structural landscape the ecosystem exists within. Actions and interactions between organizations, departments, physical spaces, and policies play a role in supporting innovation.

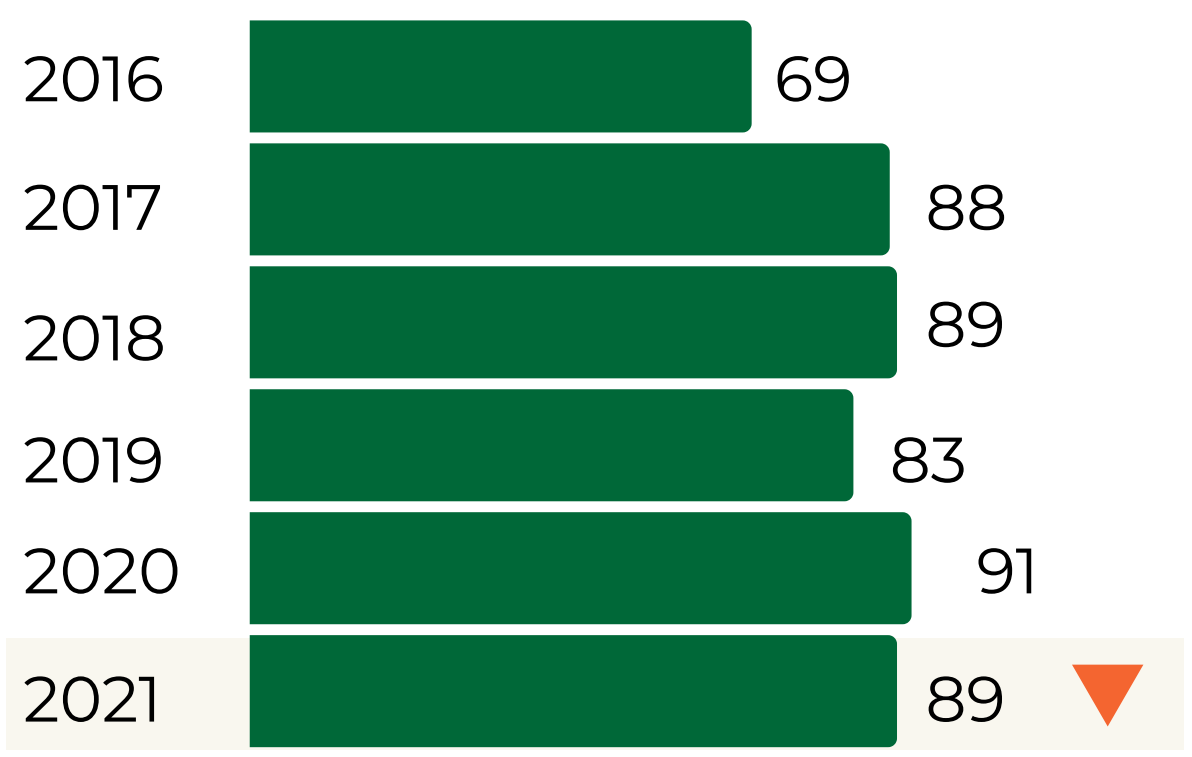
Policy & Infrastructure

89/150



-2 points

YEAR OVER YEAR TRACKING



CONTRIBUTING THEMES



Government & Investor Support



Infrastructure



Communication

SUBGROUP DIFFERENCES

Indigenous groups rated Policy and Infrastructure lower (72/150)

Neurodiverse people and those working in Finance rated Policy and Infrastructure lower (76/150)

Policy & Infrastructure

89/150



-2 points



Government and Investor Support

Overall, the support from the provincial government are viewed as having too rigid of application and funding processes. It's perceived to be too competitive, scarce, slow, and difficult to access, which is found to be detrimental to starting or growing a business. Participants have found the restrictive rules of government grants and funding to be very limiting and is not conducive to the innovation that is needed in entrepreneurship.



Infrastructure

Within the theme of infrastructure, the accessibility of internet in rural areas and the cost of internet are seen as a barriers to innovation. City transportation could also be improved to attract "world-class" talent. Examples include new innovation centres which are seen as a positive infrastructure addition if utilized effectively.



Communication & Awareness

Many agreed there was a lack of awareness and communication surrounding resources, programs, and innovation hubs, especially for entrepreneurs new to the ecosystem. Some felt that information was often spread through word of mouth which caused even more challenges with awareness and accessibility.

"It's improving. There seems to be a wellspring of support. The challenge is having flexible parameters to better address initiatives that don't fit squarely in a box or that fit across several boxes."

- Other (Tourism Marketing & Conference Promotion), Less than 6 months

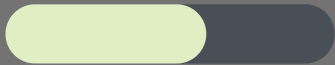


Resources are a critical factor in achieving success. Resources include funding, knowledge sharing, support, organizations and service providers and talent.

A balance of resources available in quality, quantity, and origins can support innovative potential through both generation and implementation.

Resources

92/150



-2 points



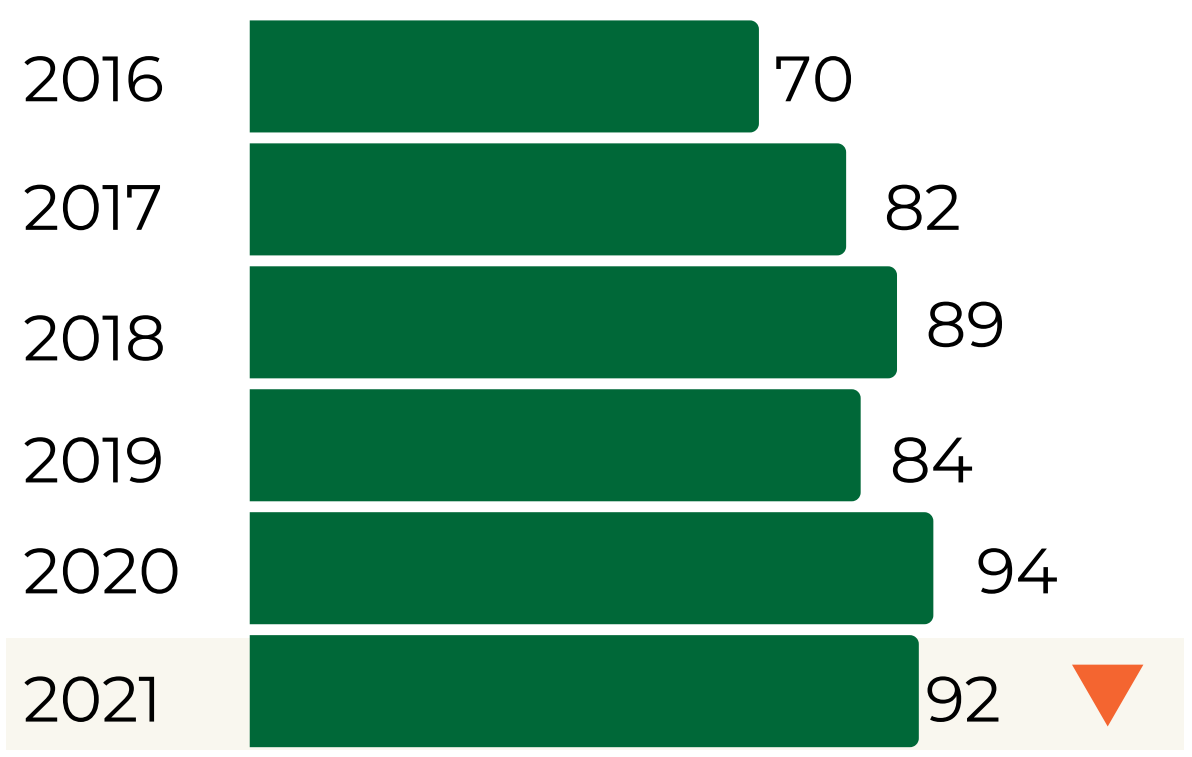
Resources

92/150



-2 points

YEAR OVER YEAR TRACKING



CONTRIBUTING THEMES



Lack of Capital



Lack of Talent



More Specialized Skills Programs

SUBGROUP DIFFERENCES

West Asians rated Resources higher (127/150)

East Asians rated Resources higher (111/150)

Those with mobility impairment rated Resources lower (56/150)

Resources

92/150



-2 points



Lack of Capital

There was a strong response to the lack of, albeit increasing, early stage capital. The pandemic also changed the landscape with many investors shifting to later stage funding instead of pre-seed capital. Many agreed that funding and getting the right resources continue to be a challenge for start-ups. Some also mentioned that they have witnessed funding agencies and VCs supporting the same subset of startups which doesn't support the ecosystem at large in terms of diversity or accessibility.



Lack of Talent

The shortage of available capital was also linked to the lack of talent in the ecosystem, especially that of more senior level tech talent. Challenges in attracting talent from outside of the province was due to the highly competitive marketplace. There is a need to develop and leverage junior talent so they continue to grow and stay within the Alberta community. Many mentioned that rigid hiring processes that focus mainly on experience and credentials is also a barrier to growing talent among new grads.



More Specialized Skills Programs

Many felt there were limited programs available for emerging areas such as data engineering, and for marketing or "soft skills". Some supplemented their skills and training programs from around the world, as they felt the Alberta based programs were lacking. Suggestions for partnership included InceptionU or the General Assembly Canada to help support displaced workers or individuals looking to up-skill their teams.

RESOURCES

"We have courses and people are completing those courses, but the proliferation of still junior but rapidly scaling companies don't know how to incorporate junior talent effectively. With respect to funding, I feel like we should have more early stage broad based funding support to get more companies through validation and onto later stages. Information is out there, but as entrepreneurs struggle to connect to resources, they struggle to connect to information to help them."

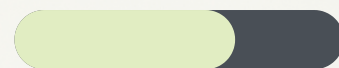
- Ecosystem Builder/Startup Service Provider/Freelancer, More than 5 years



Role models across the ecosystem are builders, influencers, and accelerators who add value to the ecosystem through inspiration; they embody characteristics that others wish to emulate. Role models can be uniquely personal and also general to the community.

Role Model

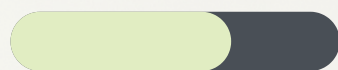
67/100



-5 points

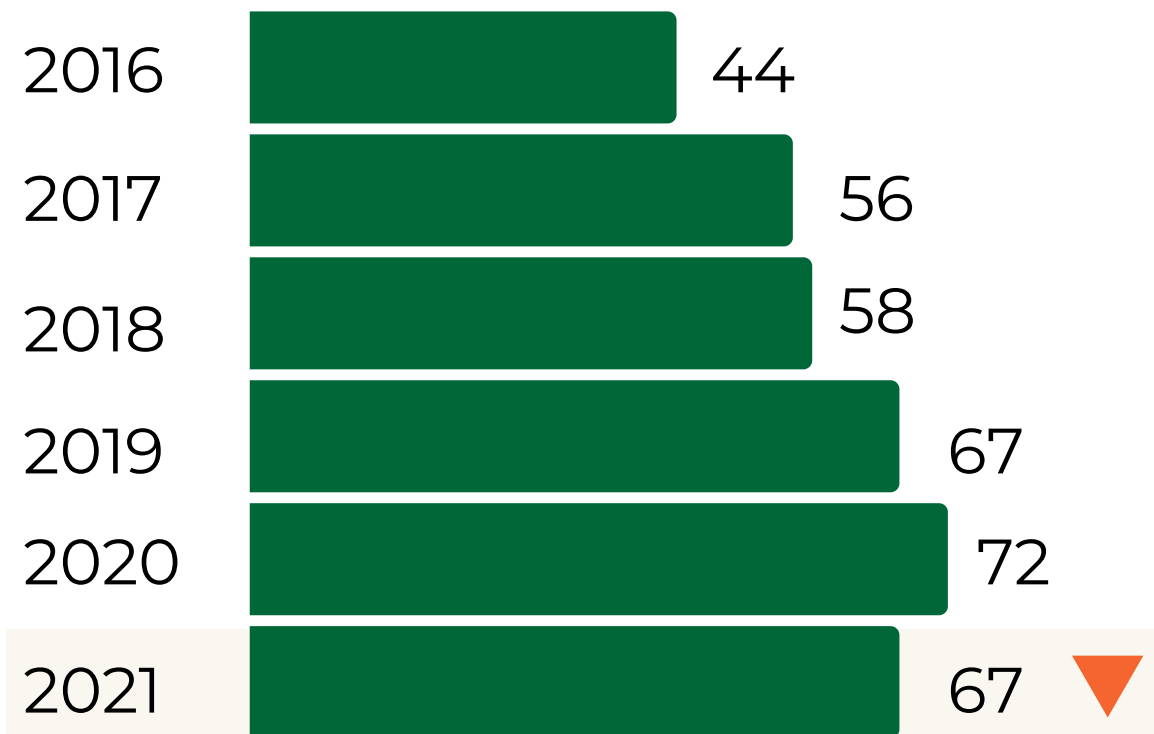


Role Model 67/100



-5 points

YEAR OVER YEAR TRACKING



SUBGROUP DIFFERENCES

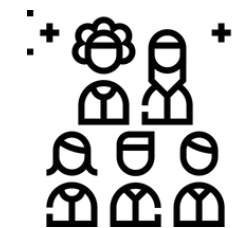
West Asians and East Asians rated Resources higher (127/150, 111/150)

Those with mobility impairment rated Resources lower (56/150)

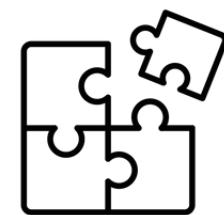
CONTRIBUTING THEMES



Accessibility & Connection



Diversity



Misalignment of fit

TOP ROLE MODELS



Brad Zumwalt
Partner, Zinc Ventures



Jade Alberts
Founder, Peer Guidance



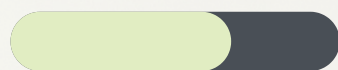
Kylie Woods
Founder & Executive Director, Chic Geek



Neal Isaac
Managing Director, Technology Assurance, Data Science and Analytics, ATB

Role Model

67/100



-5 points



Misalignment of fit

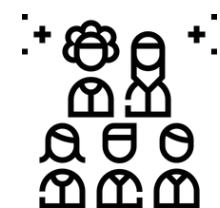
Some desired better ways to evaluate role models in the community, especially those who are not active participants in the innovation ecosystem. This would help ensure a good match and set expectations to ensure role models are meeting the needs of those they are mentoring.



Accessibility & Connection

Infrastructure was mentioned as something needing improvement to increase awareness and easier access to mentors in the ecosystem. Several mentioned they didn't know of any mentorship programs, and saw a large gap for this type of support within academic institutions.

While participants saw the value in connecting with role models for advice, accessibility to this guidance and mentorship proved to be a challenge, especially among the VC industry.



Diversity

Ensuring there is a diverse set of role models in the ecosystem so there are opportunities to support entrepreneurs with different needs. Some mentioned the need to increase and foster opportunities for leaders to become roles models.

ROLE MODEL

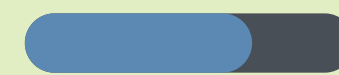
"We don't realize our place of privilege has never put us as an outsider in our own culture like our students face. Until we have walked that feeling of exclusion, we should not be boasting about how we are helping to bring diversity into our teams.

[Some organizations] are going after the root of this problem in new and creative ways collaborating with groups that needs this support which is not handing them unhelpful advise that rotates around telling someone to cold call execs and Sr leaders that only have so much time in their schedule to mentor our entire ecosystem."

- Founder/Entrepreneur/Ecosystem Builder/Educator, More than 10 years

Activities and engagement are helpful tools to foster a vibrant and connected ecosystem. Ecosystem activities should be balanced between organizational drive (top down) and grassroots led (bottom up). Activities may include networking and learning events, job fairs, pitch events, scorecard evaluations, and other forms of collaboration.

**Engaged
Activities
69/100**



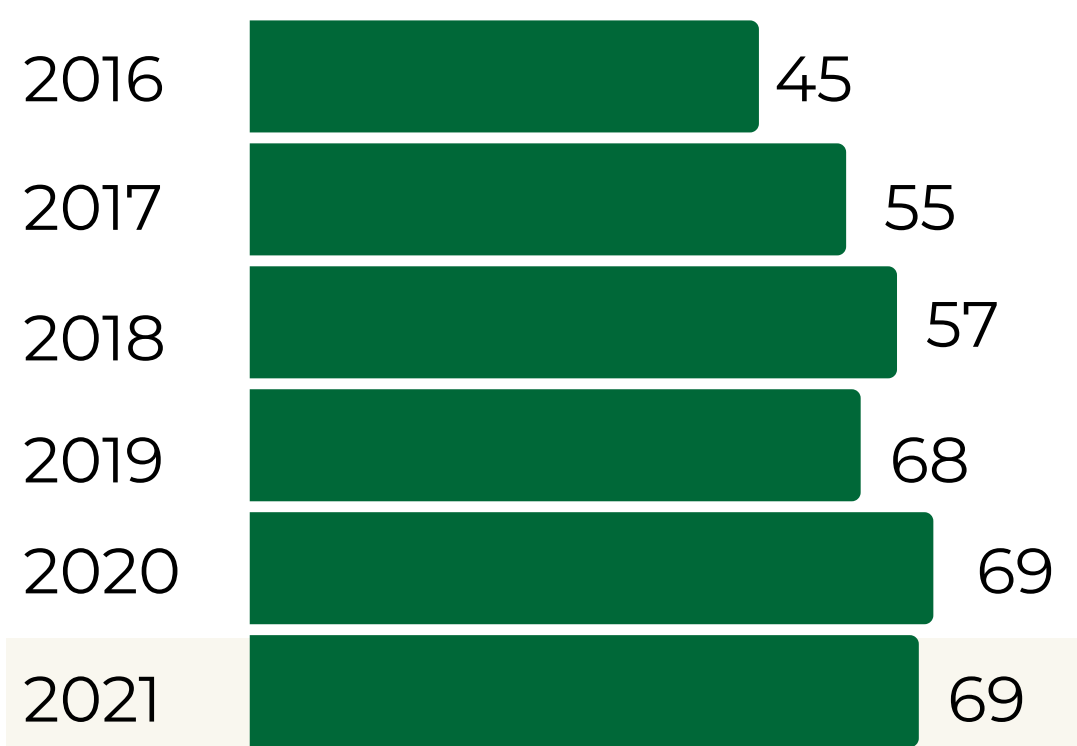
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Engaged Activities 69/100



no change

YEAR OVER YEAR TRACKING



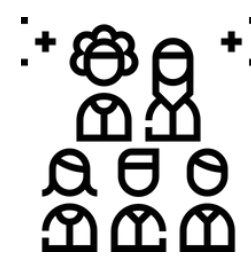
SUBGROUP DIFFERENCES

Those with mobility impairments rated Engaged Activities lower (56/100)

South East Asians and 18-27 year olds rated Engaged Activities higher (78/150)

CONTRIBUTING THEMES

 Content Variety

 Speaker & Audience Diversity

 COVID Restrictions

Engaged Activities 69/100

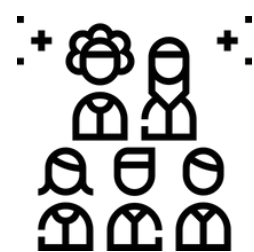


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Content Variety

Respondents desired more "high value" events with more "substance", that didn't solely rely on entertainment. Examples of organizations or events that are doing it well include Startup Calgary, Viatic and Traction. Designing events to feel more customizable and relevant to what resonates most with people in the ecosystem will encourage engagement and participation.



Diversity in speakers and audience

Inviting experts from around the world (especially in tech), and encouraging a wider cross section of people to attend events was recommended. This would encourage cross-pollination of ideas and collaboration for entrepreneurs.



COVID Restrictions

Understandably respondents had issues with accessing activities due to the pandemic. There is hope as things start to return back to normal that more events and activities will happen as restrictions are lifted. A regular cadence of events was desired, especially for IT entrepreneurs.

ENGAGED ACTIVITIES

"I can see we are trying on this one. With COVID folks have had to get really creative and I see the success at these activities related to the energy that people have to put on special events right now. Hopefully when this world comes back to be better place we will see more of these activities."

- Founder/Entrepreneur/Ecosystem Builder/Educator, More than 10 years

Diversity, Equity and Inclusion

Diversity, Equity and Inclusion

There is a gap of 1.19 between the degree to which DEI is important to the individual vs. the perceived importance to the ecosystem.

8.86

Importance to Success
of Ecosystem



7.52

Importance to Ecosystem



8.71

Importance to the
Individual



1.19

the gap between personal
importance and perceived
importance to ecosystem

RECOMMENDATIONS

1 Connect the Experienced with the Newbies

2 Mind the Gap

3 Nurture Psychological Safety

The most common roles identified are:

- Founder, Entrepreneur and Ecosystem Builder.
- Followed by Startup Employee, Investor and Startup Provider

Focusing on these as primary and secondary stakeholder groups when designing strategies, initiatives and communications may bolster meeting the needs of the ecosystem.

RECOMMENDATIONS

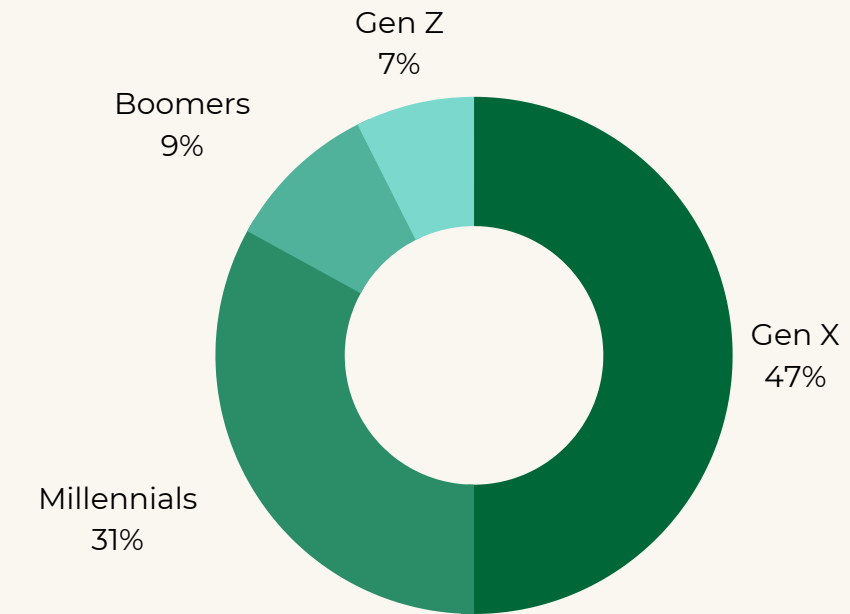
1 Connect the Experienced with the Newbies

Alberta's ecosystem has a unique opportunity to intentionally blend the perspectives, knowledge, and networks of those that are just beginning to blaze a bright future for tech in Alberta with those who have been building a solid foundation for years.

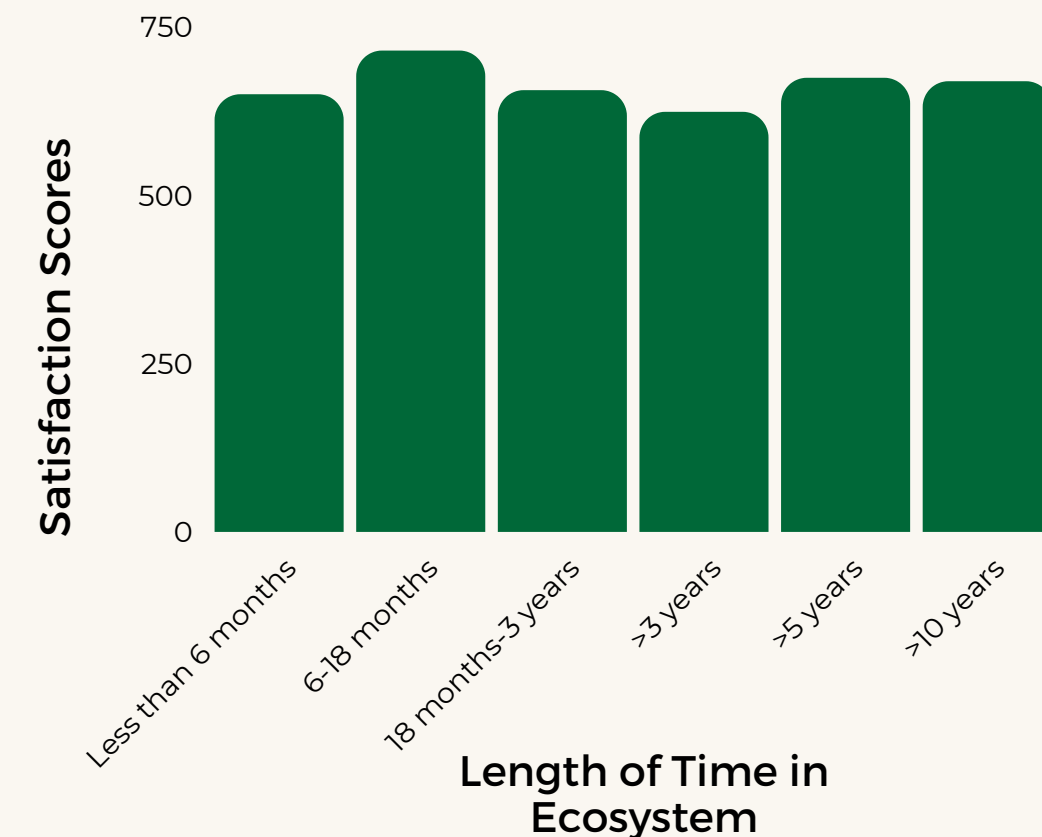
As noted in Canada West Foundation's March 2022 [Work to Live: Alberta Youth Mobility report](#), for the first time since 1988 more of Gen Z has moved out of the province than in. The report found that, "youth in Alberta, Vancouver and Toronto perceive that Alberta does not offer a breadth of career choices, that the province lacks vibrancy and that there is a lack of inclusion of diversity." Alberta's tech ecosystem has a defined opening to honour the values of diversity and inclusion that have become differentiating factors for where Gen Z and Millennials choose to live, work and invest.

By purposefully blending generations, those who are younger (Gen Z) and newer (18 months or less) to the ecosystem will benefit from the meaningful experience of those who are older (Boomers) and have been in the ecosystem for over a decade. In reverse, those who have extensive experience will benefit from the positive energy and fresh perspectives of those who are just getting started and bear the responsibility of carrying the tech sector for years to come.

Participants by Generation



Overall Satisfaction Scores by Length of Time in Ecosystem

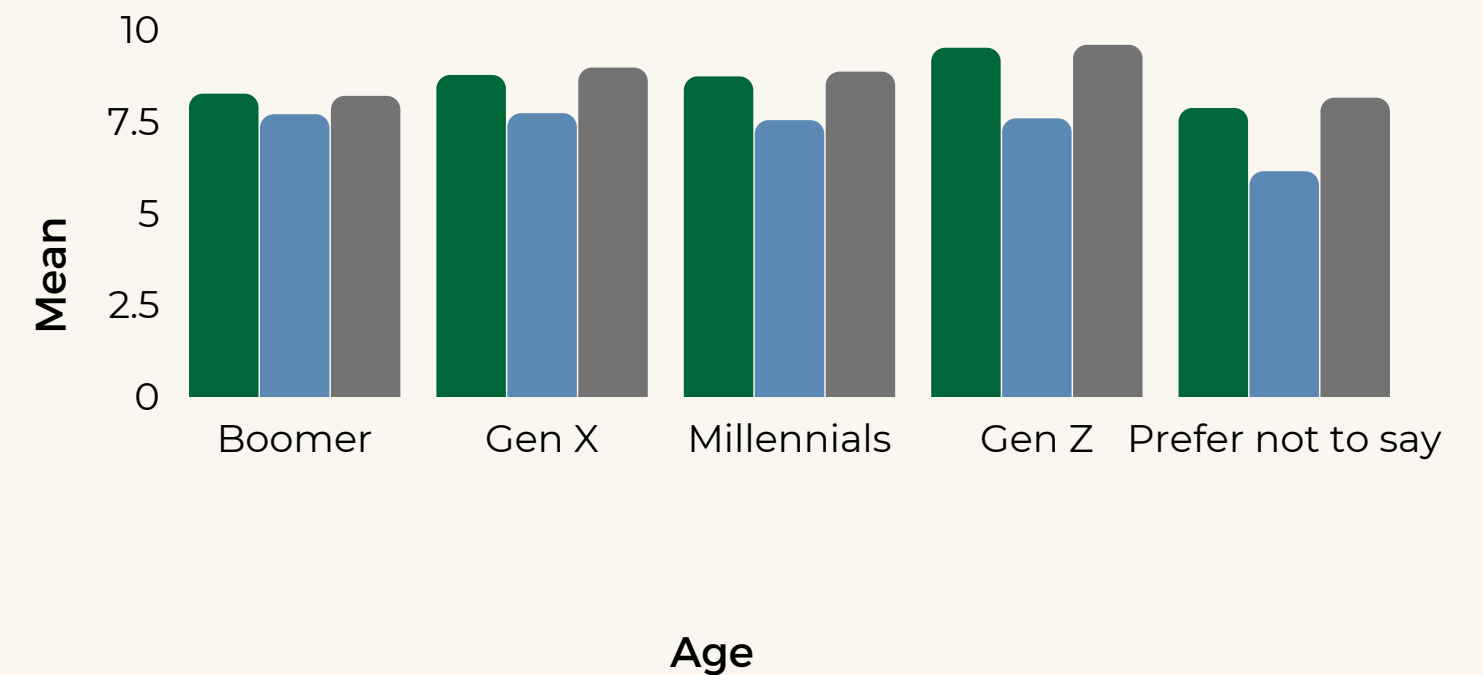


RECOMMENDATIONS

1 Connect the Experienced with the Newbies

As noted in the survey data, in each Diversity & Inclusion related question Gen Z and Boomer respondents counter each other at opposite ends of the spectrum. Gen Z have the highest scores when considering the importance of Diversity & Inclusion paired with the lowest scores when considering support and representation for their demographic - the inverse is true for Boomer respondents.

Importance of D&I



- Importance of both Diversity & Inclusion to you
- Importance of both Diversity & Inclusion to ecosystem members
- Importance of Diversity & Inclusion in building a successful ecosystem

RECOMMENDATIONS

1 Connect the Experienced with the Newbies

Tactics to help action this recommendation include crafting intentionally designed collisions between the Experienced and the Newbies when curating events, filling talent gaps, or building strategies. Mentorship-matching and training programs are also a powerful tool for developing skill sets, networks, and perspectives for both the experienced mentors and newbie mentees.



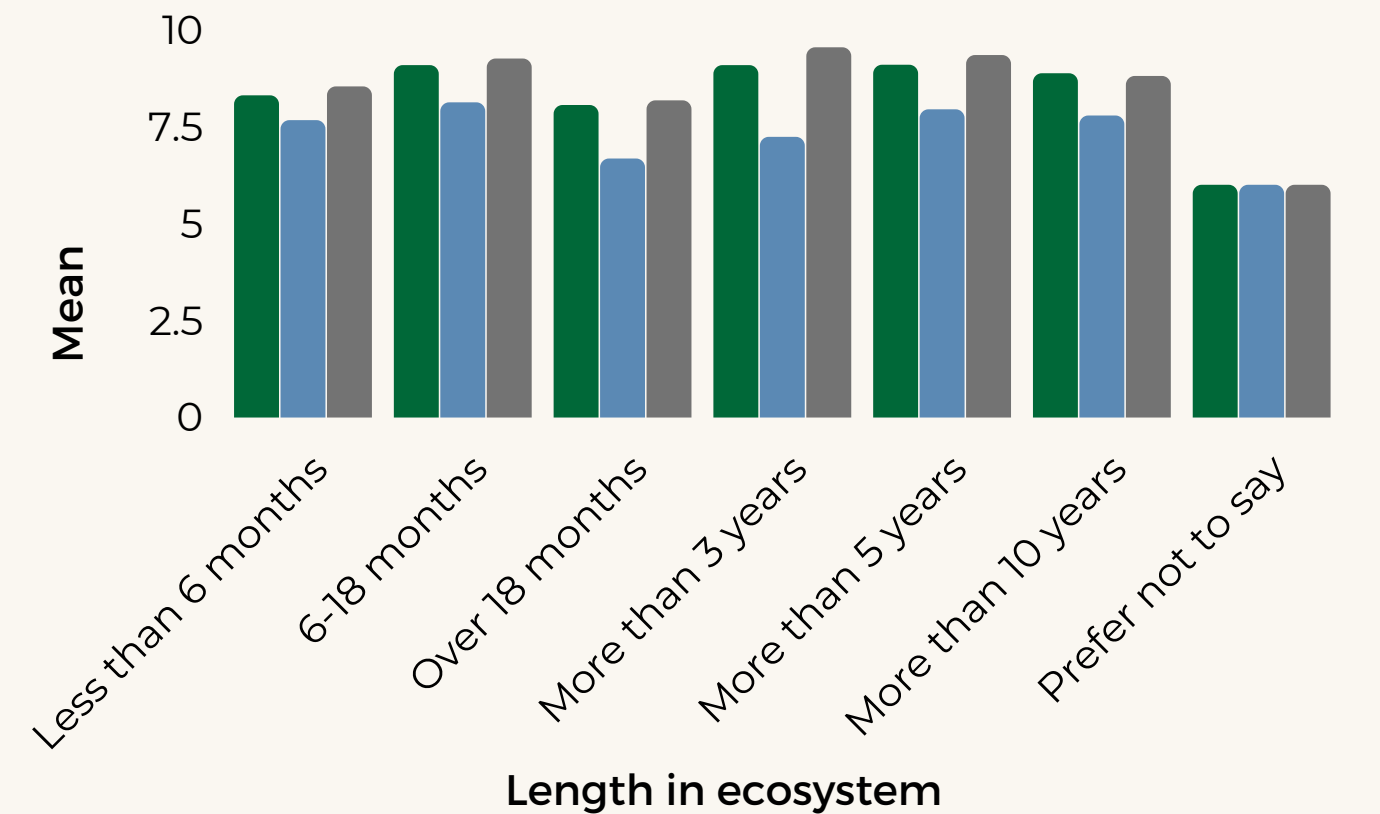
28%

HAVE BEEN IN THE ECOSYSTEM 18 MONTHS OR LESS

24%

HAVE BEEN IN THE ECOSYSTEM OVER 10 YEARS

Importance of D&I

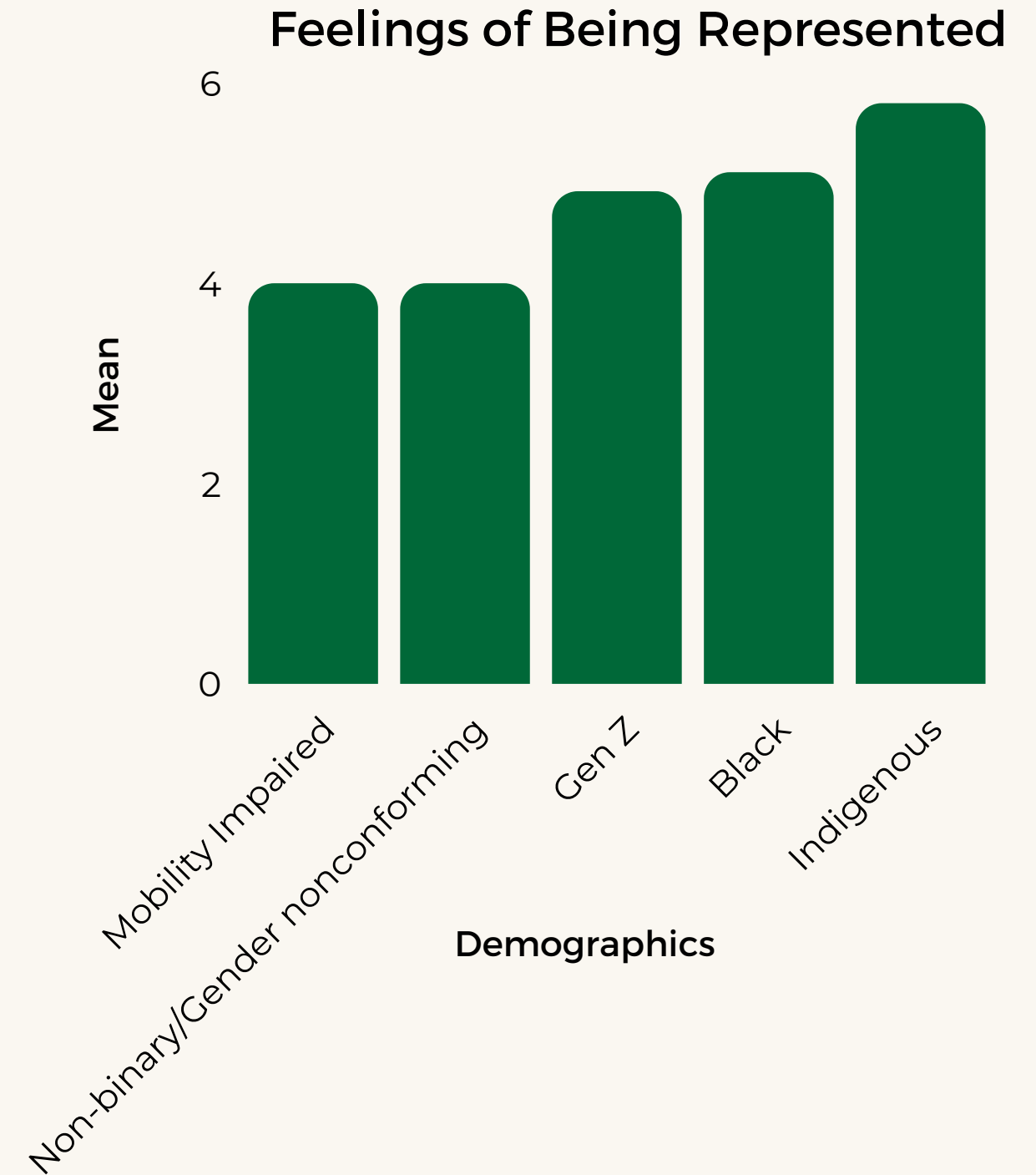


- Importance of both Diversity & Inclusion to you
- Importance of both Diversity & Inclusion to ecosystem members
- Importance of Diversity & Inclusion in building a successful ecosystem

2 Mind the Gap

Equitable representation of demographics is a powerful way to reach more innovative and profitable outcomes by leveraging diversity of thought and unlocking new markets. Additionally, by creating a more diverse and inclusive tech ecosystem Alberta increases its competitiveness for top talent, both in attracting from afar and retaining what we already have. Representation matters!

In a study completed by BCG of 1,700 companies, they used the portion of revenue from products and services launched within the last 3 years as an indicator of innovation and discovered, “Companies that reported above-average diversity on their management teams also reported innovation revenue that was 19 percentage points higher than that of companies with below-average leadership diversity—45% of total revenue versus just 26%.”



5

Groups provided lower than average ratings for feeling their demographic group is being represented in the ecosystem

RECOMMENDATIONS

2 Mind the Gap

Ensuring diverse voices are brought into the fold becomes easier when spaces, events, and tools are designed to service diverse needs - this includes accessible design for people with physical or mental disabilities and inclusive design for wide-ranging cultural perspectives based upon gender, ethnicity, care-giver status, age, sexual identity and beyond.

Focusing on existing bright spots, such as 10% of the respondents identifying as neurodiverse, will create entry points for building momentum. For example, explore how the ecosystem can elevate the experience for neurodiverse people who may struggle to navigate neurotypical norms, processes and expectations. Additionally, when considering the 35% of the ecosystem that identifies as women, how can the community eliminate micro-aggressions and attract even more women of diverse backgrounds into Alberta's tech ecosystem? Bringing these voices directly to the leadership, strategy, and design tables will ensure valuable insights are captured.

"When you design for the extremes you design for everyone"

- Ricardo Wagner,
Microsoft Accessibility Lead

10%

IDENTIFY AS BEING
NEURODIVERSE

35%

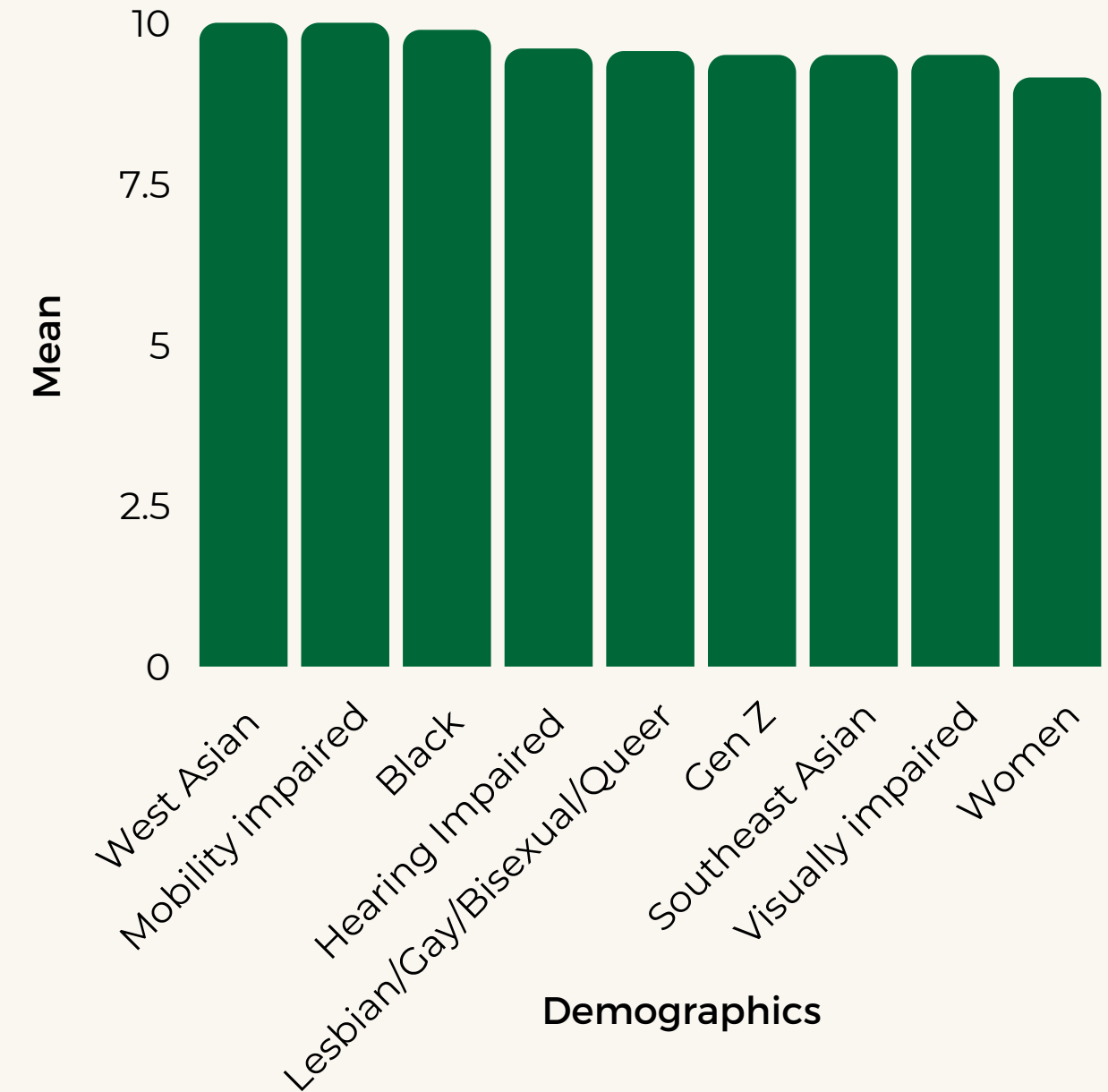
IDENTIFY AS
WOMEN

RECOMMENDATIONS

2 Mind the Gap

Additionally there are several demographic groups that feel particularly strong about the importance of Diversity & Inclusion to them personally and to the success of the ecosystem (chart shown on next slide).

Importance of Diversity & Inclusion to You



9 Groups provided higher than average ratings for feeling that D&I is important to them personally

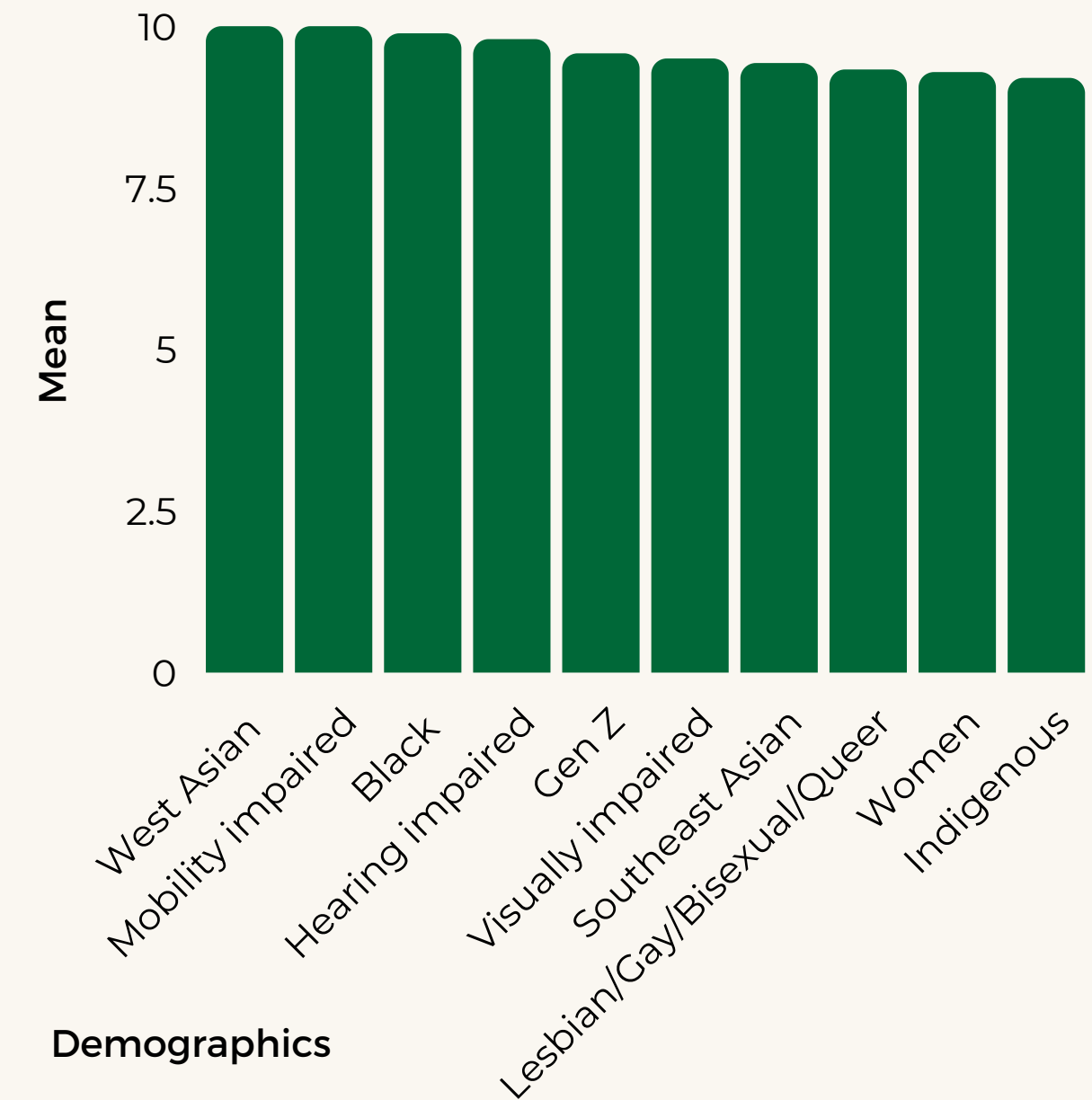
RECOMMENDATIONS

2 Mind the Gap

When considering this data, the ecosystem has an opportunity to make concerted efforts to build symbiotic relationships with organizations that focus their efforts on elevating diverse lived experiences including, [Black Professionals in Tech Network](#), [First Nations Technology Council](#), [Chic Geek](#), [8Bit Cortex](#), [Centre for Newcomers](#), etc.

By taking pro-active steps to connect with diversity-focused organizations the ecosystem's perspective, innovation, resiliency, and talent attraction capabilities will continue to expand.

Importance of Diversity & Inclusion to the ecosystem



10 Groups provided higher than average ratings for feeling that D&I is important to the ecosystem

RECOMMENDATIONS

2 Mind the Gap

When comparing data from the annual ecosystem survey against Alberta census data, representation is lacking from several demographics including: Women, Indigenous, Southeast Asian, and East Asian.

	Alberta Rainforest Study	Alberta*
European	29%	65%
Boomer	9%	29%
Women	35%	50%
Gen Z	7%	14%
Indigenous	3%	8%
Southeast Asian and East Asian	6%	11%

Source: [Stats Canada, Census Profile, 2016](#)

RECOMMENDATIONS

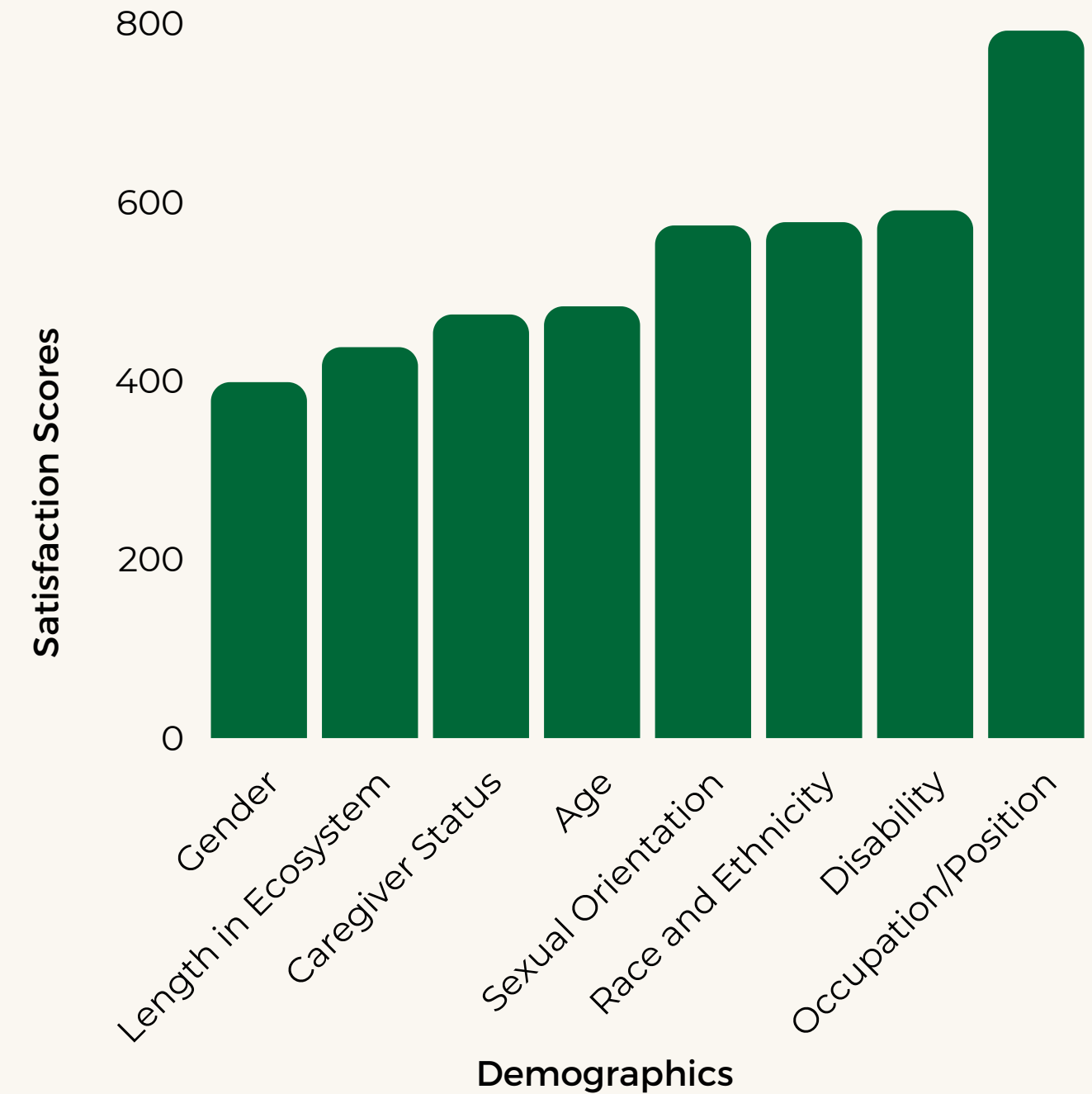
3 Nurture Psychological Safety

A notable outlier throughout the survey were those who chose “prefer not to say” (PNTS) throughout the demographic section of the survey. The overall satisfaction scores for PNTS were the lowest in every demographic category except for Occupation/Position.

"Psychological Safety is a shared belief held by members of a team that the team is safe for interpersonal risk-taking."

- Amy Edmondson,
Harvard Behavioural Science

Overall Satisfaction Scores Among PNTS



RECOMMENDATIONS

3 Nurture Psychological Safety

Additionally, the number of PNTS respondents increased significantly when asked about dimensions of diversity that are often invisible/hidden. Selecting PNTS jumped from an average of 4% to 8% for caretaker status, 9% for disability status, and 10% for sexual identity.

The inclination not to disclose hidden dimensions of diversity indicates there is room for improvement when considering psychological safety throughout the ecosystem. A lack of psychological safety is based on a belief that bringing one's whole self to the community may result in undesirable consequences such as negative judgement, damaged reputation, and/or career limitations.

The proportion of respondents who elected not to share their disability status and sexual identity increased significantly

RESPONDENTS THAT PREFERRED NOT TO DISCLOSE

9%

DISABILITY
STATUS

10%

SEXUAL
IDENTITY

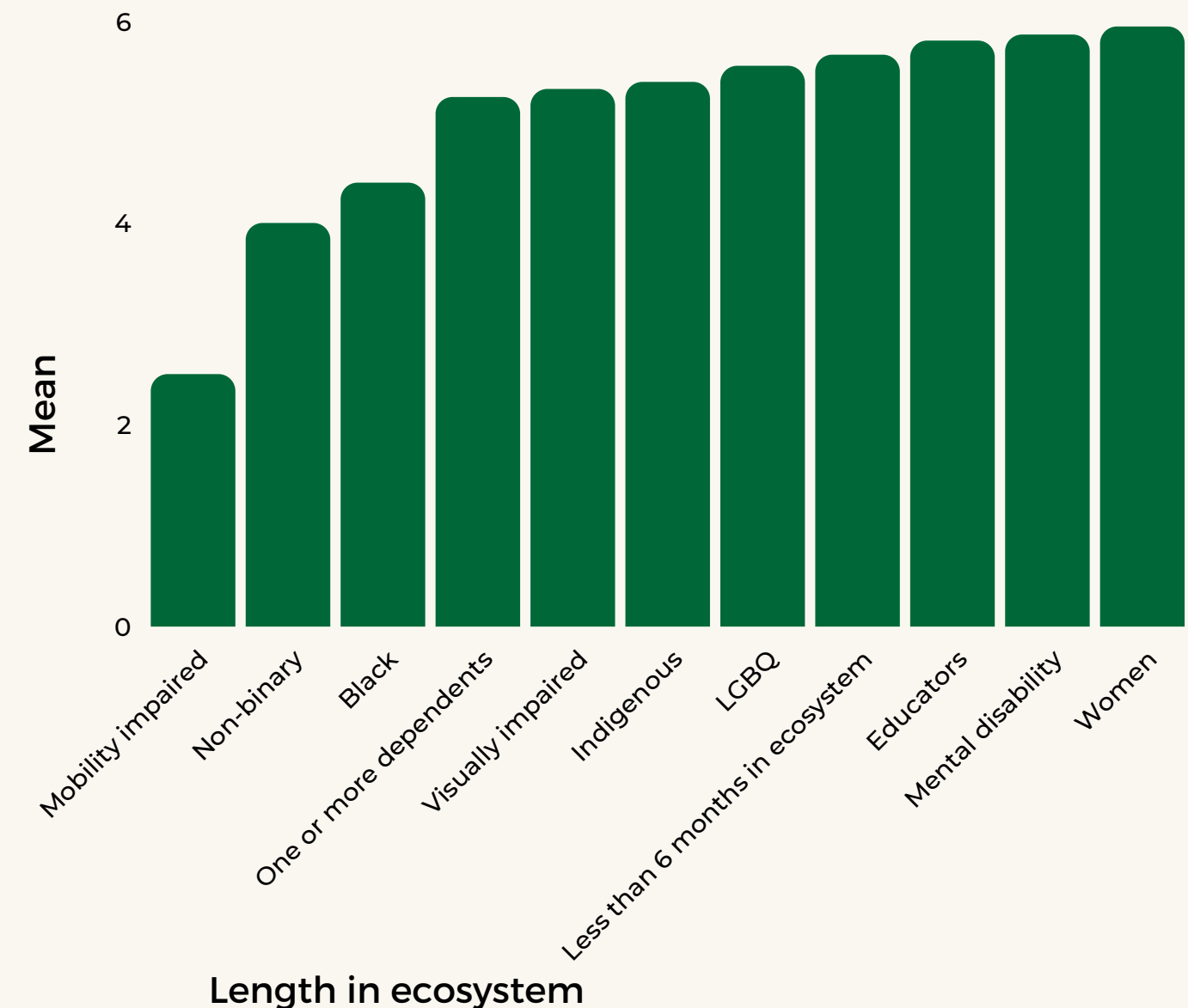
RECOMMENDATIONS

3 Nurture Psychological Safety

Psychological safety is a key component to building inclusive and innovative ecosystems. Without psychological safety the diversity of thought that may exist within the community is suppressed and homogenized to ensure security for the less dominant demographics. Other outcomes of low psychological safety include a loss of innovative solutions, negative impacts to mental and physical health, higher rates of absenteeism and presenteeism, and overall lower engagement and sense of belonging.

Further, there were 11 demographic categories that scored under a 6.00 (on a 10-point scale) when asked if they felt well supported, under the overall average score of 6.76.

Feelings of Being Supported



RECOMMENDATIONS

Showcase

Promoting diverse first-hand storytelling through guest speakers, diversity-focused organizations, and interested team members.

Openness

Normalizing discussion about inclusion related topics and learning opportunities through 'Inclusion Moments' at the beginning of meetings.

Leadership

Building diverse leadership teams.

RECOMMENDATIONS

Motivate

Openly rewarding courageous displays of allyship and honest feedback.

Commitment & Recognition

Making a commitment to understand and practice land recognitions at social gatherings. Genuine land recognitions are a positive step towards decolonizing events and recognizing the original Indigenous caretakers of the lands in which Alberta's tech ecosystem thrives today.

Growth Mindset

Increasing the availability and promotion of Diversity & Inclusion education opportunities. Education can take many forms including: the Intercultural Development Inventory, workshops, guest speakers, the University of Alberta's Indigenous Canada Certificate, as well as actively acknowledging current events and annual historic dates.

PERCEPTIONS OF RAINFOREST

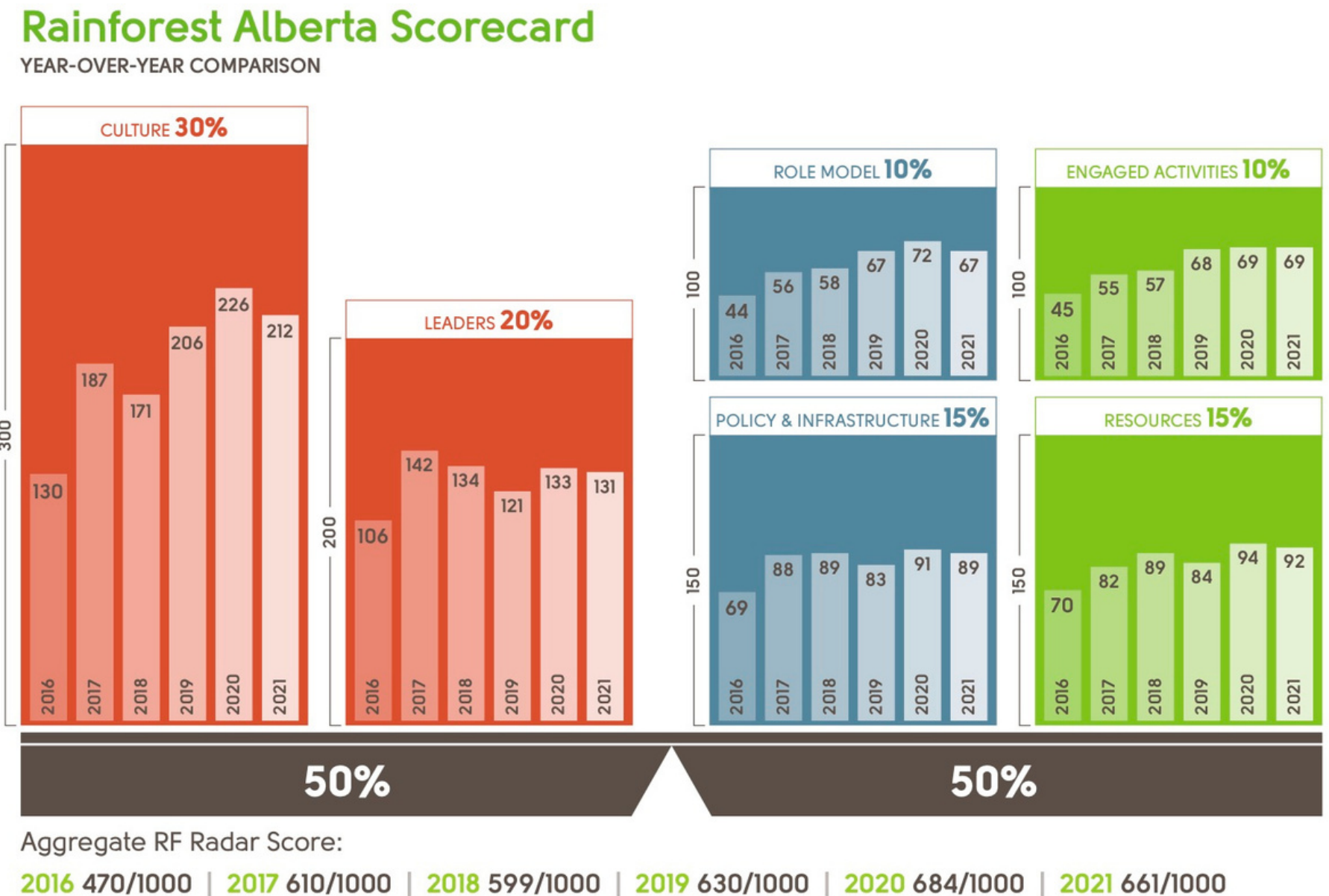
"For me the Rainforest model has facilitated both knowledge of and interaction with the Calgary community and resources. Keep it up!"

-Founder/Entrepreneur, More than 10 years

Study Details

Year-over-year comparison & Target

In previous years a goal had been set to reach a score of 800/1,000 by 2021. The ecosystem did not reach this goal, however, it is encouraging to see an increasingly honest measurement of the ecosystem through an increased sample size and a large number of individuals (70%) who did not participate in the Scorecard last year.



Rainforest Alberta Scorecard History

The Rainforest Alberta Scorecard Assessment was derived from the book, "The Rainforest Scorecard: A Practical Framework for Growing Innovation Potential" by Henry Doss and Alistair Brett. The framework was created to measure the innovation pillars within an organization and was further adapted through the work that Rainforest Alberta undertook with Rainforest Strategies LLP consultants between 2016-2018.

In 2019 it was identified that the Rainforest Alberta movement had evolved beyond the scope of Rainforest Strategies LLP. As a result, a large group within the community undertook a re-tooling exercise to ensure the right questions were being asked in the assessment. This approach, though collaborative, led to an ineffective survey design.

In 2020, Rainforest Alberta worked with a Diversity, Equity, and Inclusion (DEI) expert to include respondent demographics in the Scorecard Assessment, which provided valuable data on how various demographics experienced the ecosystem.



Rainforest Alberta Scorecard History

There was still, however, lower-than-anticipated participation in the 2020 survey.

This led to the 2021 iteration of the survey presented in this report. In order to provide the ecosystem with an effective measurement of the six pillars and valuable data, a psychometrics expert was engaged to redesign a lasting and effective 2021 iteration of the Scorecard.

In this iteration of the Scorecard Assessment, a new DEI section was created and questions throughout the survey were designed to:

- Align with the pillars
- Provide insights by splicing data demographically for questions
- Educate and prime the ecosystem
- Measure gaps between awareness, perception, and desire

The resulting analysis have informed recommendations to increase the score of the six pillars.





Gaps in Scorecard Research & Data insights

Jenelle Morgan, Psychometrics Expert

The goal of the Rainforest Scorecard is to measure the presence and quality of the ecosystem's infrastructure (i.e., the six pillars), in their facilitation of a thriving innovation community in Calgary, Alberta. Whereas the Scorecard has been critical in understanding the state of Calgary's entrepreneurial and innovative capabilities, further improvements in its design and content would provide a more accurate depiction of the ecosystem's performance.

We targeted three main areas in ensuring the Scorecard more precisely measures the ecosystem's infrastructure. The first is reconfiguring the focus to the ecosystem, rather than the community. The previous Scorecard asked respondents to evaluate the "community" on various attributes, which likely resulted in participants examining the Rainforest community, rather than the broader ecosystem that encapsulates it. The written comments provided by previous years' respondents, showed frequent mentions of "Rainforest" in their evaluations rather than the ecosystem. This highlights the importance of being more intentional about the context we want respondents to evaluate.



Gaps in Scorecard

Research & Data insights

Second, we simplified questions that were loaded with multiple concepts to facilitate easier reflection on the part of respondents. For instance, instead of asking participants whether the ecosystem is “welcoming, inclusive and collaborative”, we focus on one of these concepts at a time in our queries. By evaluating a single idea in one question, participants would be less likely to conflate their assessments of multiple concepts.

And relatedly, in our third objective, we further clarified potentially ambiguous terms that are likely interpreted differently by our respondents. For example, if we ask participants to evaluate whether the ecosystem is “diverse”, certain respondents may construe this as a variety in skillsets, whereas others could interpret this as pertaining to ethnicities. By defining what we mean by diversity, we reduce issues with misunderstanding specific issues within the ecosystem.

Overall, these changes are projected to contribute to a more accurate evaluation of the ecosystem’s infrastructure, through creating a shared understanding and assessments of the pillars.



Gaps in Scorecard

Research & Data insights

Research Insights

Several metrics have been developed to evaluate ecosystems' capacities to cultivate, support and advance innovation hubs across communities. Examples of these measures are the Global Enterprise Monitor, and the Entrepreneurial Framework Conditions. Other institutes such as the Kauffman Foundation and Startup Genome, have also conceptualized their own indicators of successful innovation ecosystems.

Collectively, these efforts have pointed to the density of entrepreneurs, market fluidity (i.e., population flux, reallocation of the market, and high-capacity firms), government policies, as well as physical, financial, and academic resources as critical contributors to these systems. Further, human resources are an important consideration, as individuals' skillsets, abilities, talents, and experiences, as well as their access to education and entrepreneurial opportunities are foundational to any effective ecosystem.



Gaps in Scorecard Research & Data insights

These metrics are important for identifying and evaluating objective indicators of successful innovation ecosystems; however, it is the invisible infrastructure that facilitates the trajectory toward this outcome. If innovators are unaware of certain resources or believe that these are inadequate or inapplicable to their own experiences, then this drives a disconnect between the resources that are present, and what innovators *perceive* these to be.

Thus, it is vital to consider ecosystem members' perceptions of the ecosystem as they determine whether their entrepreneurial pursuits would be futile. In other words, questions centered on individuals' evaluation of innovation opportunities and support, and the fears that may be associated with this, ultimately dictate the success of the ecosystem (i.e., whether, and how long, individuals pursue innovation).

The Rainforest Scorecard is positioned as the middle ground of capturing how innovators and entrepreneurs perceive these systems, where these perceptions are used as metrics of the ecosystems' performance.



Gaps in Scorecard

Research & Data insights

What shapes individuals' perceptions are their diverse lived experiences, that go beyond their professional backgrounds. Typically, in the ecosystem, diversity has been evaluated as the extent to which the economy specializes in different areas (see Kauffman foundation). While this is an important metric, we still need to account for how perceptions of the ecosystem's infrastructure change across groups (e.g., race, ethnicity, sexual and gender identities etc.).

What ultimately motivated our focus on intentionally integrating DEI in the revision of the Rainforest Scorecard measure, was that participants were examining DEI questions distinctly from the six pillars. This pattern indicated the need to intentionally measure attitudes toward DEI, the extent to which the ecosystem is representative of individuals from diverse backgrounds and the ecosystem's quality of support in creating equitable opportunities for different groups.

Scholars have pointed to the importance of measuring the infrastructure for different dimensions of DEI (not solely economic specializations) as part of the metric for innovation ecosystem performance 1,2,3. Having a diversity of individuals from different sociocultural backgrounds and skillsets inherently positions the ecosystem to be more competitive 4.



Gaps in Scorecard

Research & Data insights

This is achieved through the variety of ideas and innovations brought to the fore from the diverse groups represented in the ecosystem, which substantively contributes to the ecosystem's growth. Further, by mitigating barriers to different groups' access to the necessary resources for innovation, we can actively participate in the diversification of the economy. This is important for strengthening an ecosystem's resilience against certain risks that would otherwise be damaging if the economy was over-reliant on one or a major source of revenue 4,5.

This is a particularly important consideration for the Canadian context, as the general populace is quite heterogenous, placing the country as one of the most diverse nations in the world 6. Thus, Canada is in a unique position to leverage this resource in scaling and supporting innovation.

Further, immigrants have been consistently linked to contributing to entrepreneurship and innovation evident within certain countries 7. However, with issues such as Canada's policies for innovation/entrepreneurship mainly applying to larger corporations, where only 2% of businesses have more than 5 employees 7, and women-led initiatives receiving less grants/funds 2, point to the need to evaluate these issues more intentionally.



Gaps in Scorecard Research & Data insights

Therefore, in addition to incorporating targeted DEI questions that evaluate the ecosystem's support for these issues, we further specified questions around policy and accessibility to resources. By cross-referencing participants' responses to these items with their demographic information, we can specifically evaluate the extent to which they perceive the quality of ecosystem support, given their own unique experiences.

Meet our experts!

Experts recruited from our local community were paramount in creating an intentional survey design that produced valuable insights

Jenelle is a PhD student in the Industrial-Organizational Psychology program at the University of Calgary. She works in the selection and recruitment lab examining the content and influence of employee voice as expressed in online organizational reviews. As a result, Jenelle has developed skillsets in using machine learning tools, univariate, and multivariate analyses, and has worked previously in survey design and creation. Further, Jenelle teaches undergraduate labs in quantitative and qualitative research analyses and methods, and privately tutors graduate students in the same area.

More generally, her goals are to determine how organizations and systems cultivate climates where persons feel supported, and how feedback can facilitate this process.



Jenelle Morgan

Psychometrics expert



Rachel Wade

DEI expert

Rachel is an award winning Diversity & Inclusion professional. She has been working in the area of Diversity & Inclusion for the last eight years from various perspectives including grassroots, corporate, public, internal and external facing, locally and internationally. Her industry experience includes healthcare, energy, tech, marketing, finance, and non-profit.

Rachel is the Founder and President of Including You Consulting where she partners with small and medium-size businesses to address their Diversity & Inclusion goals. Rachel has her BA in Communications and Culture from the University of Calgary, her MA in Professional Communications from Royal Roads, and is a Qualified Administrator of the Intercultural Development Inventory.

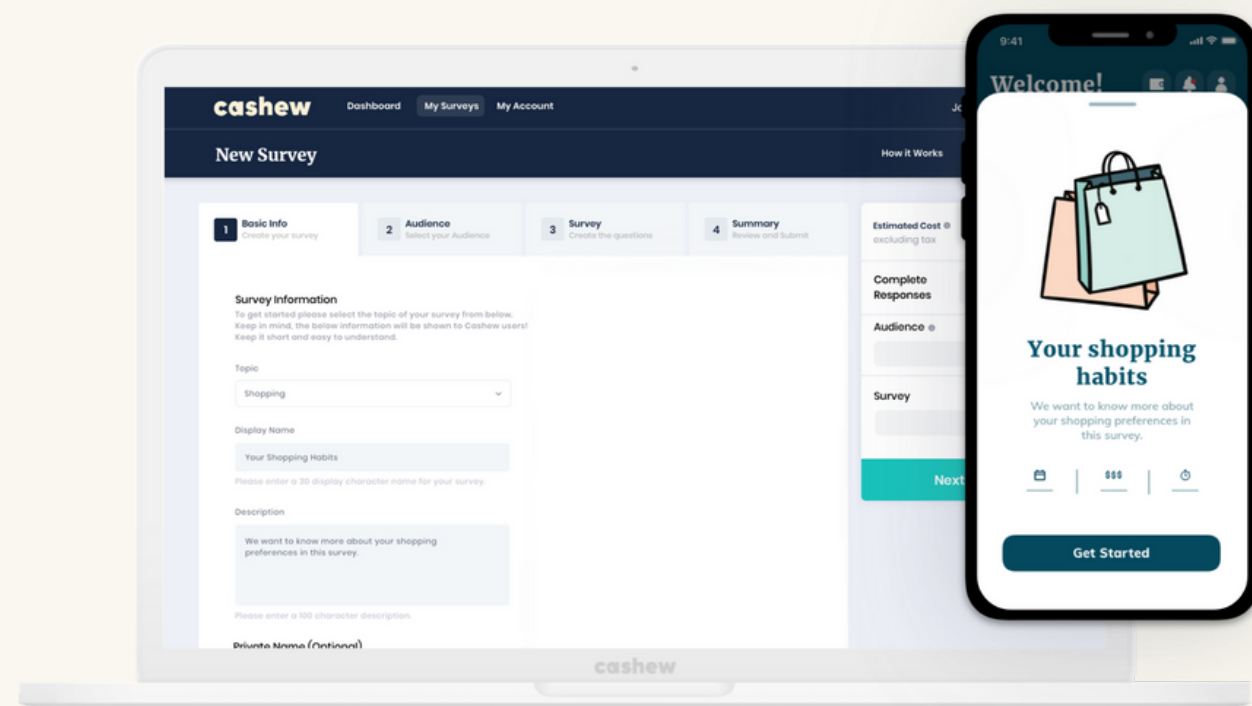
Meet our experts!

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cashew

Cashew makes it easy for companies to gain quality consumer insights. They are a market research technology company based out of Calgary.

cashewlife.com



How Cashew is different:

- Cashew users are paid (via E-transfer) 10X the industry average for participating in surveys
- In-depth profiling among all Cashew users to find your audience easily
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How to work with Cashew:

- With the support of expert researchers, craft your survey and get high quality consumer insights quickly
 - Understanding the attitudes and behaviours of your target audience better
 - Validating your business model
 - Learning how you stack up to your competition
 - Testing messaging or creative concepts for campaigns



What's Next?

Next Steps for the Rainforest Alberta Calgary team include distribution of the 2021 Scorecard Analysis to Calgary Innovation Coalition members, ecosystem leaders, and the broader community. From there we will work to collaboratively implement recommendations and identify areas of improvement among ecosystem stakeholders.

Results will also be added to the analysis currently being undertaken by Rainforest Alberta to refresh the movement's overall strategy.

Stay tuned for further updates and how you can be involved.

Have any questions or looking for more information on the data collected in this report?

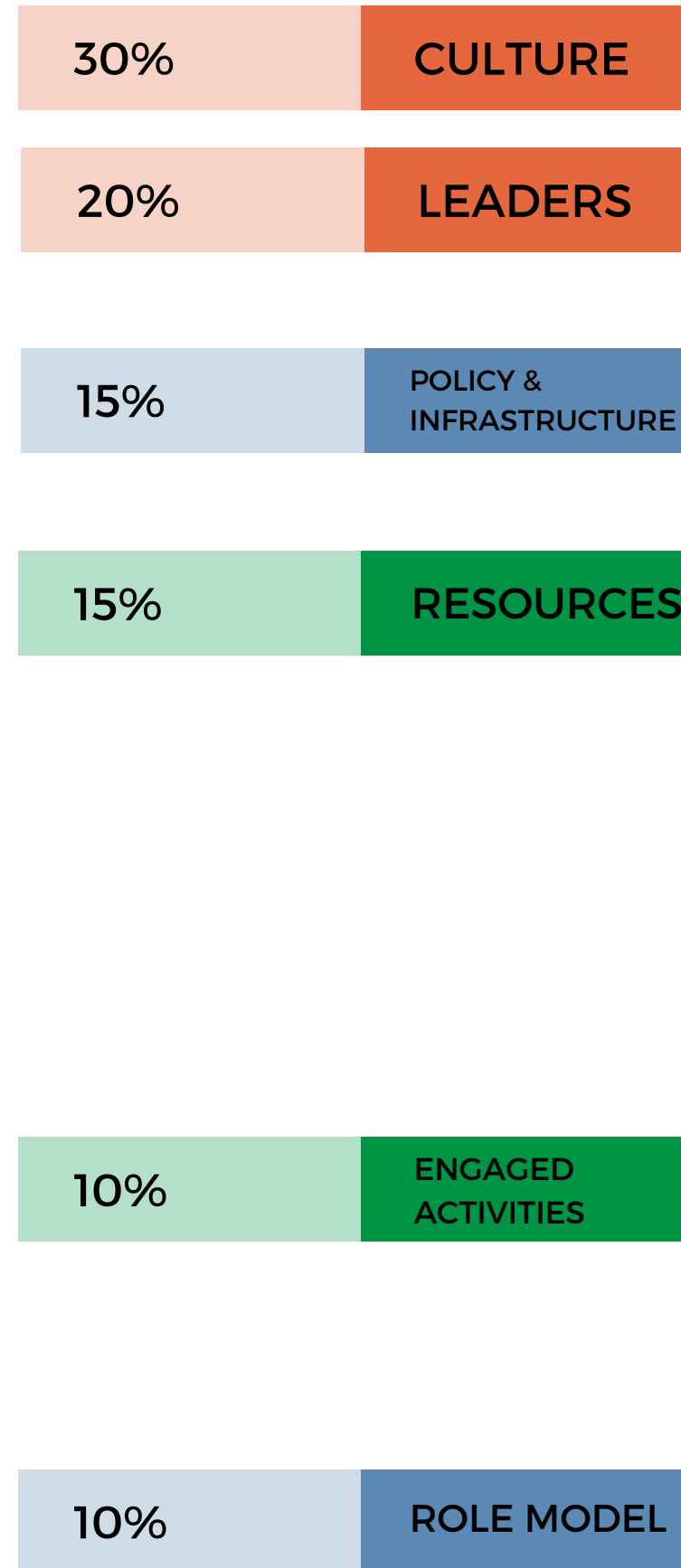
Contact the Rainforest Alberta team.
info@rainforestab.ca

Appendix

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What are the pillars?



Culture is the foundation of any innovation ecosystem. It is the shared values and actions of ecosystem members which ultimately determine the success of ecosystem initiatives.

Leaders, both formal and informal, are decision makers positioned to realize potential, convey perspectives, and rally groups to influence outcomes for innovation.

Policy and Infrastructure is the infinite, non-depleting structural landscape the ecosystem exists within. Actions and interactions between organizations, departments, physical spaces, and policies play a role in supporting innovation.

Resources are a critical factor in achieving success. Resources include:

1. Funding: access to funders, grants, etc
2. Knowledge sharing: publications, patents, databases, Research & Development
3. Support, organizations and service providers: programs, accelerators, incubators, work space
4. Talent: skilled labor pool and powerful networks A balance of resources available in quality, quantity, and origins can support innovative potential through both generation and implementation.

A balance of resources available in quality, quantity, and origins can support innovative potential through both generation and implementation.

Activities and Engagement are helpful tools to foster a vibrant and connected ecosystem. Ecosystem activities should be balanced between organizational drive (top down) and grassroots led (bottom up). Activities may include networking and learning events, job fairs, pitch events, scorecard evaluations, and other forms of collaboration.

Role models across the ecosystem are builders, influencers, and accelerators who add value to the ecosystem through inspiration; they embody characteristics that others wish to emulate. Role models can be uniquely personal and also general to the community.

Survey Questions Pillar: Culture

Culture is the foundation of any innovation ecosystem. It is the shared values and actions of ecosystem members which ultimately determine the success of ecosystem initiatives. Based on your experiences in the ecosystem, to what extent do you see the following occur?

1 = I see this less often 5 = I see this half the time 10 = I see this all the time

- Failure is accepted as part of the path to success, within the ecosystem.
- Individuals within the Calgary ecosystem are willing to help others without expecting something in return.
- The ecosystem actively welcomes and includes people with diverse lived experiences (i.e., gender identity, ethnic/racial backgrounds, Indigenous, sexual orientation, abilities/disabilities, age, etc.).
- Trust among individuals is evident within the ecosystem.
- Individuals within the ecosystem encourage each other to dream big.
- Individuals within the ecosystem act collaboratively instead of competitively.
- Are there any other comments you would like to share about the Culture pillar?

Survey Questions

Pillar: Policy and Infrastructure

Policy and Infrastructure is the infinite, non-depleting structural landscape the ecosystem exists within. Actions and interactions between organizations, departments, physical spaces, and policies play a role in supporting innovation. Based on your experiences with Policy and Infrastructure in the ecosystem, to what extent do you see the following occur?

1 = I see this less often 5 = I see this half the time 10 = I see this all the time

- Government policy facilitates the growth of startups.
- The physical infrastructure (e.g., accessible spaces, internet access, hardware, etc.) within the ecosystem supports innovation."
- Timely decision-making is evident across policymakers in the ecosystem.
- There are effective communication tools/platforms to share data, events, and happenings in the ecosystem.
- Entrepreneurs are able to identify ecosystem supports (e.g., mentorship and funding options) that are applicable to their current stage of growth.
- Are there any other comments you would like to share about the Policy and Infrastructure pillar?

Survey Questions Pillar: Leaders

Leaders, both formal and informal, are decision makers positioned to realize potential, convey perspectives, and rally groups to influence outcomes for innovation. Based on your experiences with Leaders in the ecosystem, to what extent do you see the following occur?

1 = I see this less often 5 = I see this half the time 10 = I see this all the time

- Leaders throughout the ecosystem represent a variety of diverse lived experiences (i.e., gender identity, ethnic/racial backgrounds, Indigenous, sexual orientation, abilities/disabilities, age, etc.).
- Leaders in the ecosystem effectively communicate their visions and objectives to other ecosystem members.
- Leaders in the ecosystem are accessible for guidance and advice.
- Ecosystem members are supportive of leaders' initiatives.
- Leaders in the ecosystem value and encourage diversity of thought from a diverse spectrum of individuals (i.e., gender identity, ethnic/racial backgrounds, Indigenous, sexual orientation, abilities/disabilities, age, etc.).
- Are there any other comments you would like to share about the Leaders pillar?

Survey Questions Pillar: Role Models

Role models across the ecosystem are builders, influencers, and accelerators who add value to the ecosystem through inspiration; they embody characteristics that others wish to emulate. Role models can be uniquely personal and also general to the community. Based on your experiences with Role Models in the ecosystem, to what extent do you see the following occur?

1 = I see this less often 5 = I see this half the time 10 = I see this all the time

- Successful innovators are viewed as role models in the ecosystem.
- There are systems to support high-potential future role models.
- Role models are accessible to the ecosystem for guidance and mentorship.
- Role models in the ecosystem inspire me to be a role model.
- Role Models throughout the ecosystem represent diverse lived experiences (i.e., gender identity, ethnic/racial backgrounds, Indigenous, sexual orientation, abilities/disabilities, age, etc.).
- Are there any other comments you would like to share about the Role Models pillar?

Survey Questions Pillar: Resources

Resources are a critical factor in achieving success. Resources include:

- Funding: access to funders, grants, etc.
- Knowledge sharing: publications, patents, databases, Research & Development
- Support, organizations and service providers: programs, accelerators, incubators, work space
- Talent: skilled labor pool and powerful networks A balance of resources available in quality, quantity, and origins can support innovative potential through both generation and implementation.

A balance of resources available in quality, quantity, and origins can support innovative potential through both generation and implementation. Based on your experiences with Resources in the ecosystem, to what extent do you see the following occur?

1 = I see this less often 5 = I see this half the time 10 = I see this all the time

- There are widely accessible programs to train workers with needed skills for the ecosystem.
- The ecosystem's workforce is talented across a range of skill sets that support market demands.
- There are effective resources provided by organizations to support entrepreneurs through mentorship and education.
- There are helpful programs to inform industries about in-demand skilled workers (e.g., through post secondary education institutes, nonprofits, industry organizations and job fairs).
- Entrepreneurs are able to access funding at the various stages of their entrepreneurial growth.
- Relevant information from a broad spectrum of disciplines is accessible to members of the ecosystem.
- Are there any other comments you would like to share about the Resources pillar?

Survey Questions Pillar: Engaged Activities

Activities and Engagement are helpful tools to foster a vibrant and connected ecosystem. Ecosystem activities should be balanced between organizational drive (top down) and grassroots led (bottom up). Activities may include networking and learning events, job fairs, pitch events, scorecard evaluations, and other forms of collaboration. Based on your experiences with Activities within the ecosystem, to what extent do you see the following occur?

1 = I see this less often 5 = I see this half the time 10 = I see this all the time

- There are activities within the ecosystem that support innovation.
- Ecosystem activities are designed to be inclusive of people with diverse lived experiences (i.e., gender identity, ethnic/racial backgrounds, Indigenous, sexual orientation, abilities/disabilities, age, etc.).
- Activities enable collaboration between ecosystem members from wide ranging professional backgrounds and industries.
- Activities hosted within the ecosystem create value (e.g., through inspiration, calls to action, problem-solving, and learning).
- The ecosystem encourages self-organization of events and activities.
- Are there any other comments you would like to share about the Engaged Activities pillar?

Survey Questions
Pillar: Diversity, Inclusion and Belonging

Rainforest Alberta is committed to supporting a diverse and fully-inclusive ecosystem representative of the communities that we exist within. We understand that your background may be a contributing factor to your experience with the ecosystem and want to learn more about you, your perspectives on inclusion, and your lived experience.

When considering diversity we encourage you to consider a variety of lived experiences including but not limited to: gender identity, ethnic/racial backgrounds, Indigeneity, sexual orientation, abilities/disabilities, and age.

Reminder: All individual responses will remain confidential and will be used to inform our progress, gaps, and opportunities year over year. You may choose “prefer not to say” for any of the demographic questions.

1 = Not quite important to you 5 = Moderately important 10 = Extremely important

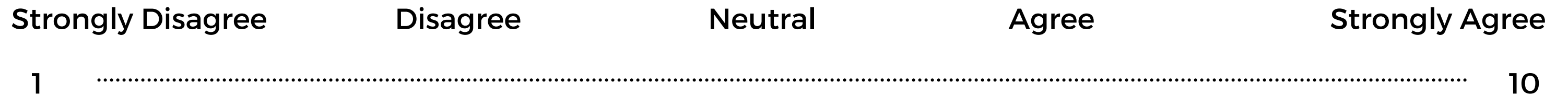
- Importance of both Diversity and Inclusion to you.
- Importance of both Diversity and Inclusion to ecosystem members.
- Importance of both Diversity and Inclusion in building a successful ecosystem.

Survey Questions
Pillar: Diversity, Inclusion and Belonging

Rainforest Alberta is committed to supporting a diverse and fully-inclusive ecosystem representative of the communities that we exist within. We understand that your background may be a contributing factor to your experience with the ecosystem and want to learn more about you, your perspectives on inclusion, and your lived experience.

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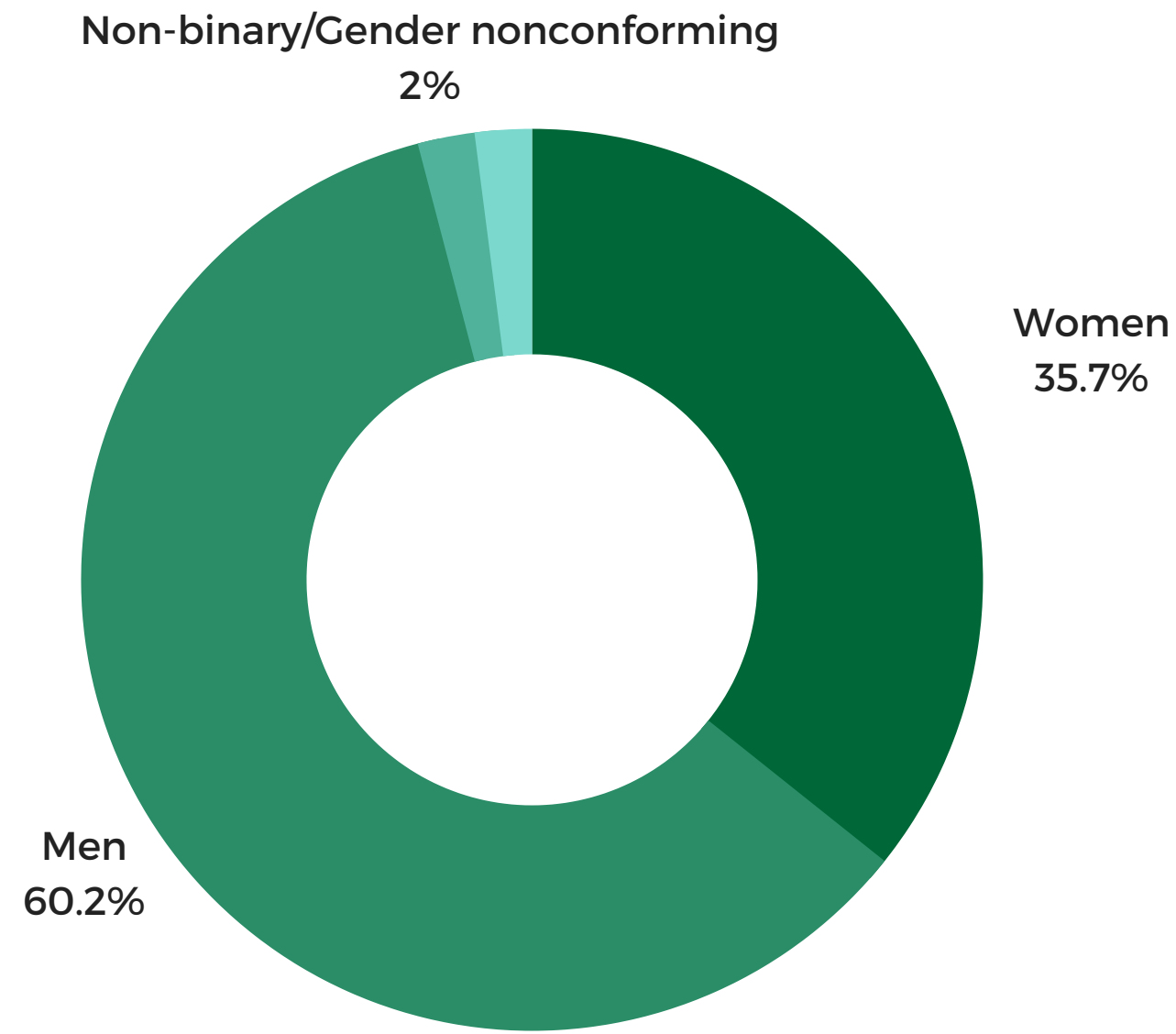


- The ecosystem is both a Diverse and Inclusive community.
- People like me are well represented throughout the ecosystem.
- People like me are well supported throughout the ecosystem.

WHO MAKES UP THE ECOSYSTEM?

Gender

Proportion of Participants



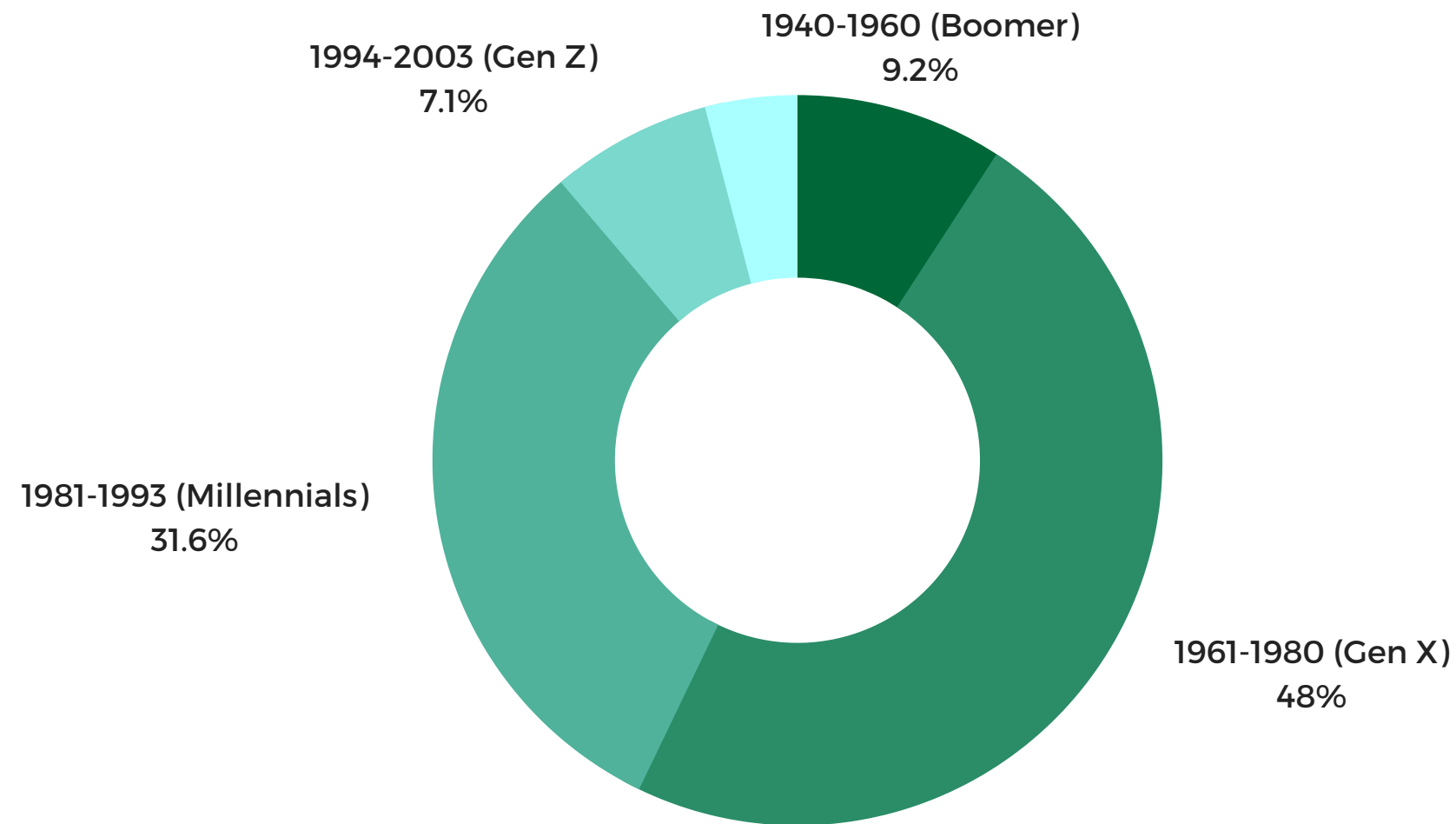
Total Pillar Satisfaction Scores

Men	672.82
Women	652.85
Non-binary/Gender nonconforming	643.83
Prefer not to say	396.84

WHO MAKES UP THE ECOSYSTEM?

Age

Proportion of Participants



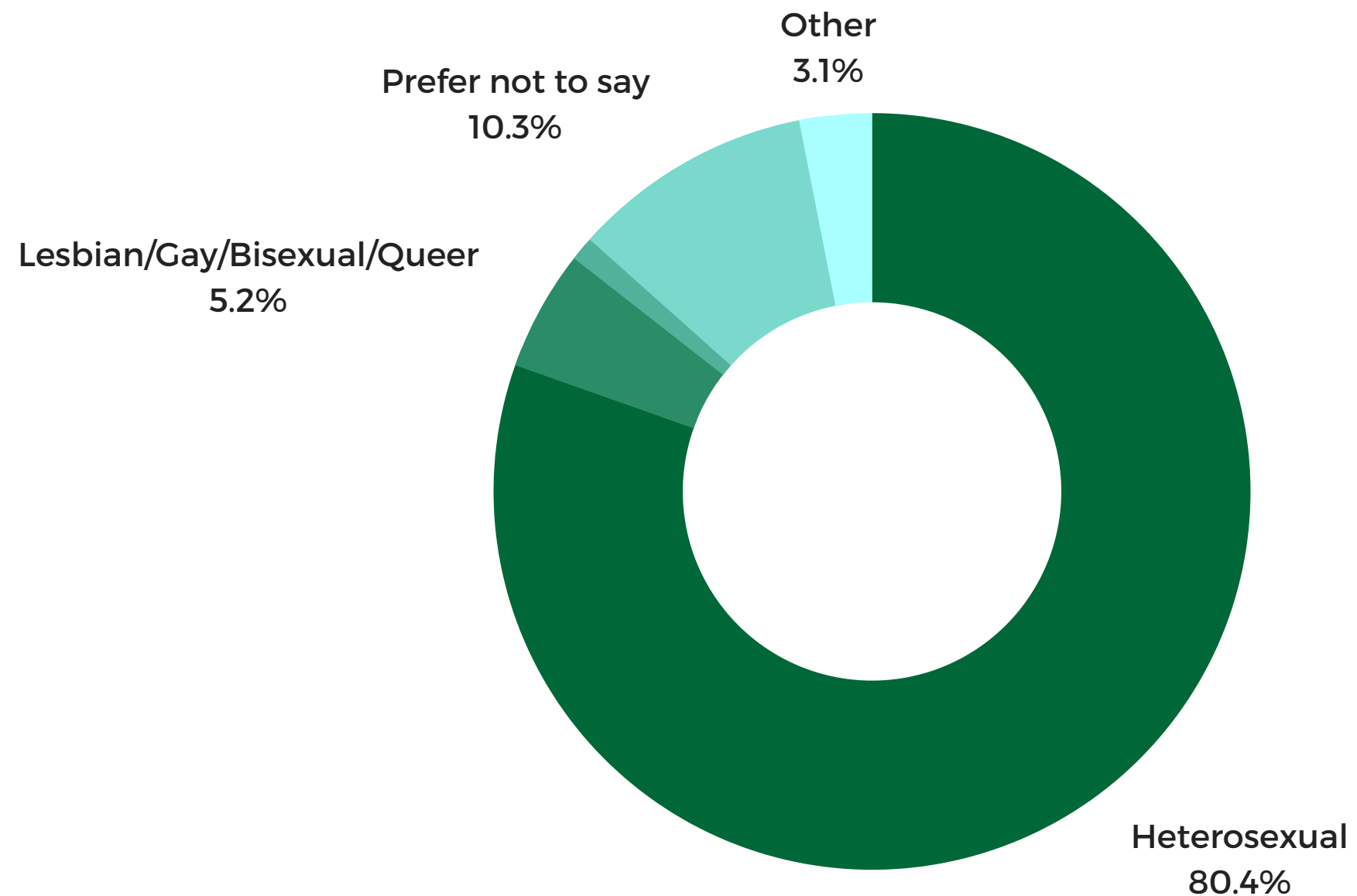
Total Pillar Satisfaction Scores

Gen Z	713.08
Gen X	671.21
Millennials	665.71
Boomer	627.53
Prefer not to say	481.7

WHO MAKES UP THE ECOSYSTEM?

Sexual Orientation

Proportion of Participants



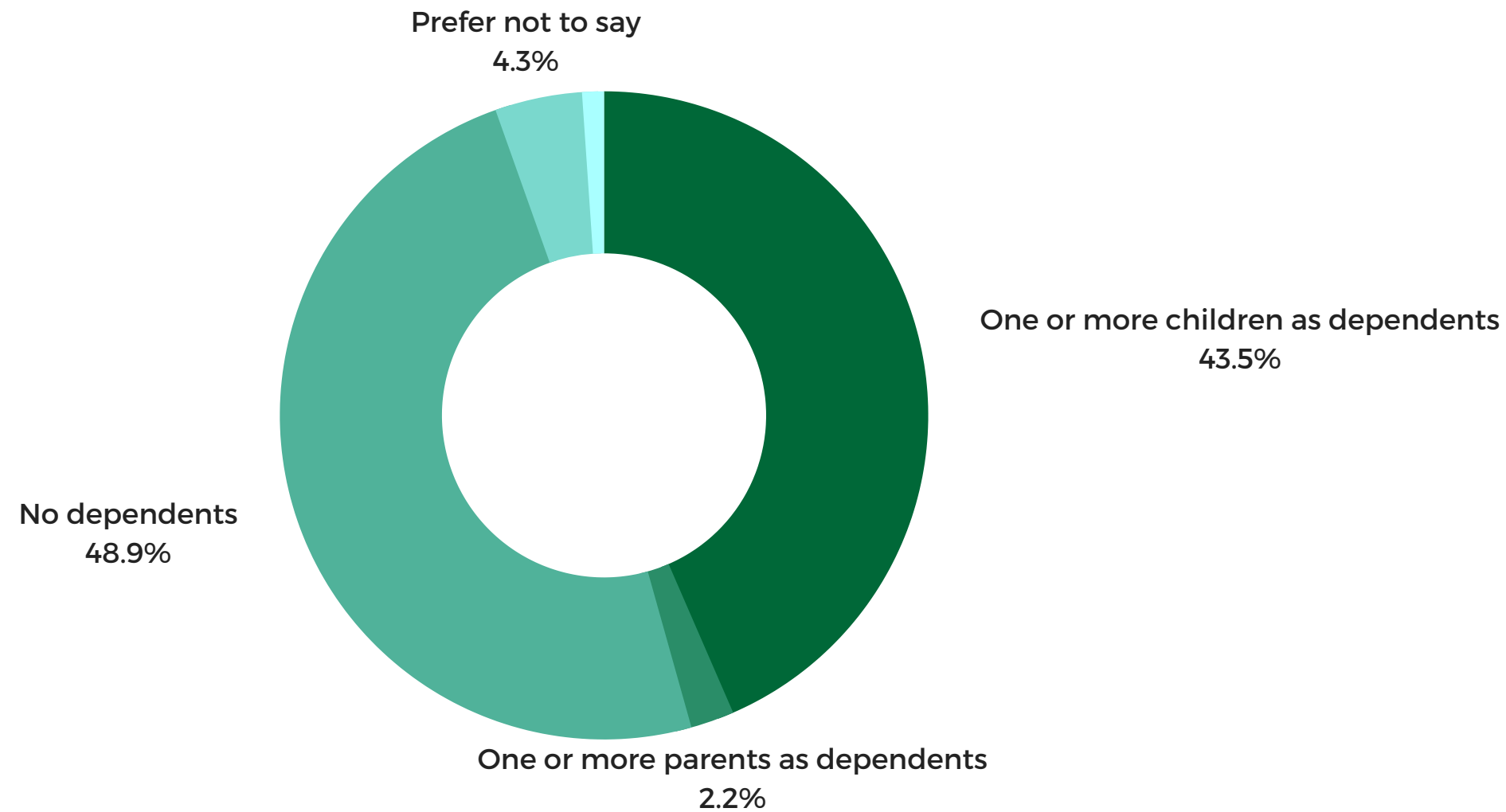
Total Pillar Satisfaction Scores

Heterosexual	676.25
Lesbian/Gay/Bisexual/Queer	675.5
Prefer not to say	572.21
Other	534

WHO MAKES UP THE ECOSYSTEM?

Caregiver Status

Proportion of Participants



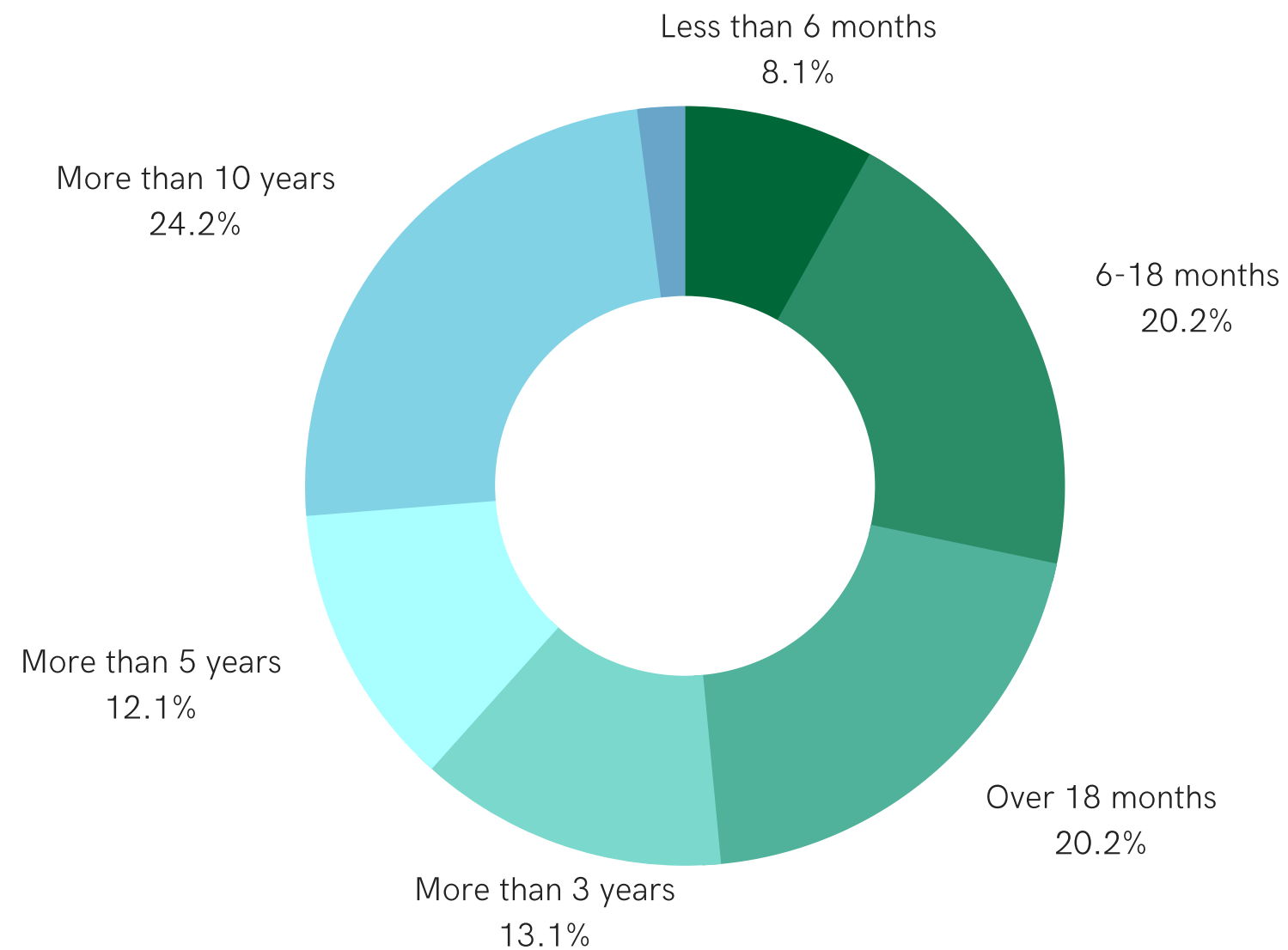
Total Pillar Satisfaction Scores

Other	718
One or more children as dependents	674.41
No dependents	669.39
One or more parents as dependents	599.75
Prefer not to say	472.59

WHO MAKES UP THE ECOSYSTEM?

Length of time in ecosystem

Proportion of Participants



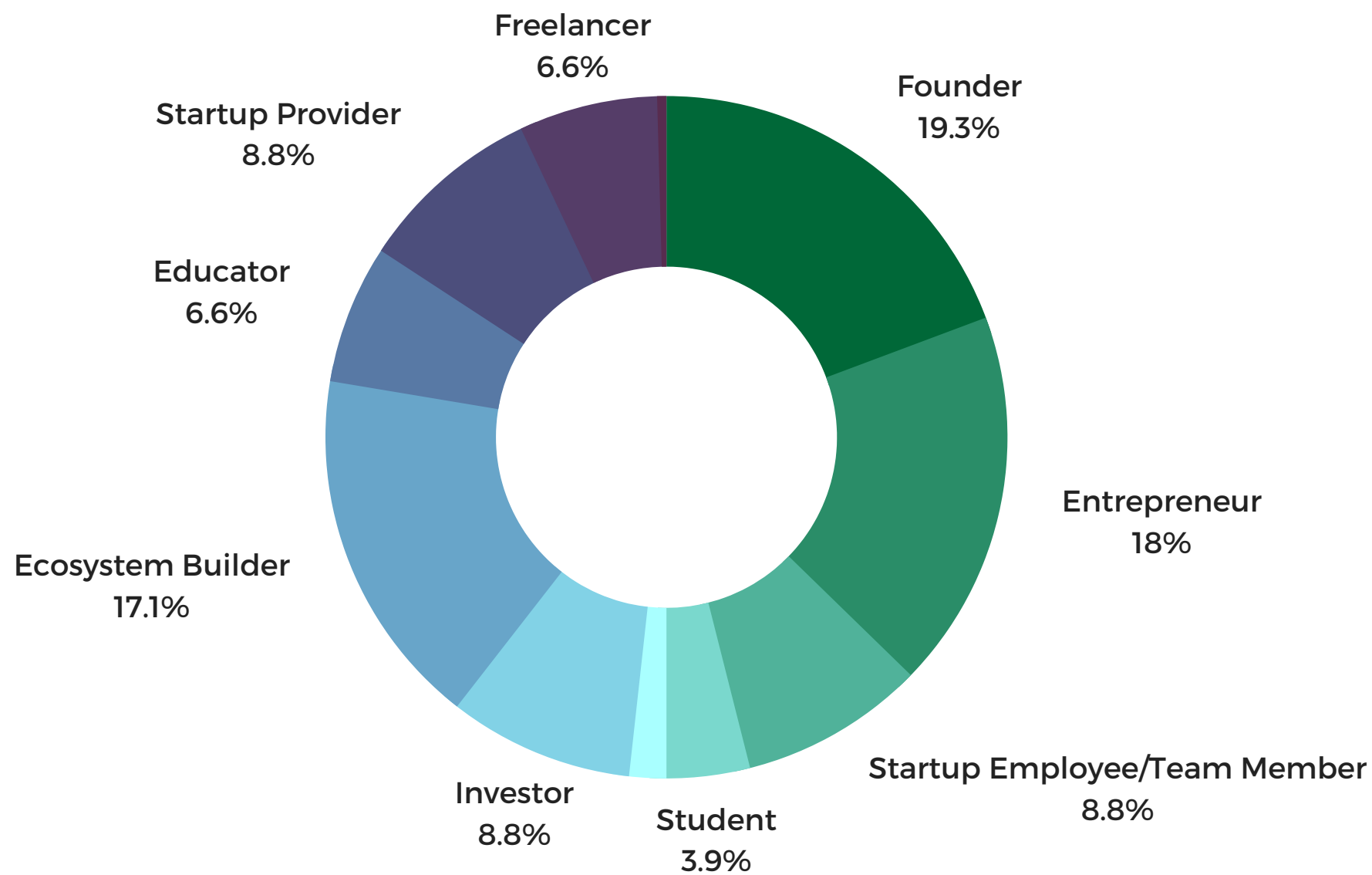
Total Pillar Satisfaction Scores

Less than 6 months	650.15
6-18 months	715.05
Over 18 months	656.2
More than 3 years	624
More than 5 years	674.6
More than 10 years	669.48
Prefer not to say	436

WHO MAKES UP THE ECOSYSTEM?

Occupation/Position

Proportion of Participants



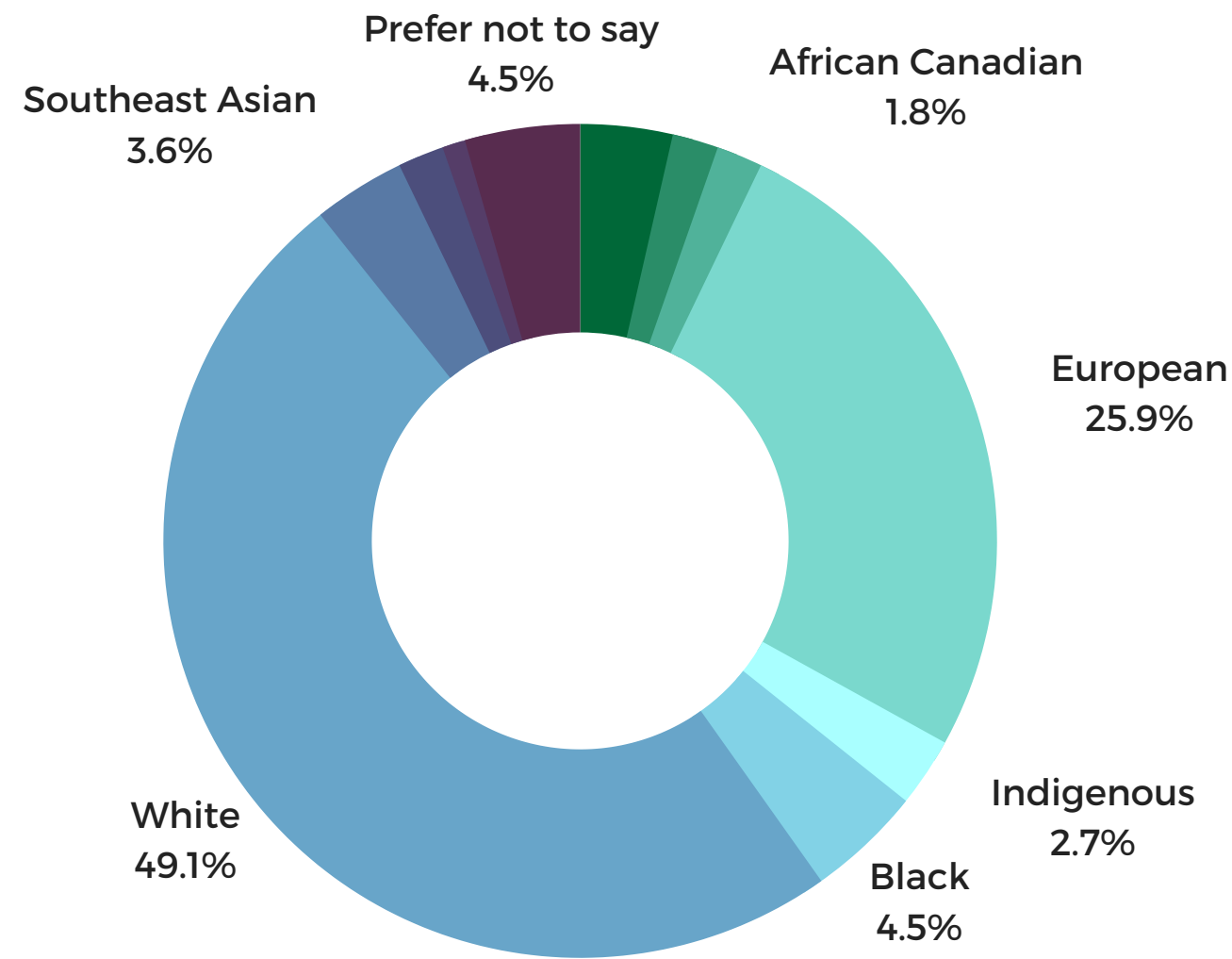
Total Pillar Satisfaction Scores

Prefer not to say	790.25
Student	725.54
Freelancer	690.04
Startup Provider	684.16
Startup Employee/Team Member	681.22
Policymaker/Government Representative	675.5
Ecosystem Builder	668.61
Founder	655.12
Investor	654.19
Entrepreneur	648.08
Educator	631.18

WHO MAKES UP THE ECOSYSTEM?

Race/Ethnicity

Proportion of Participants



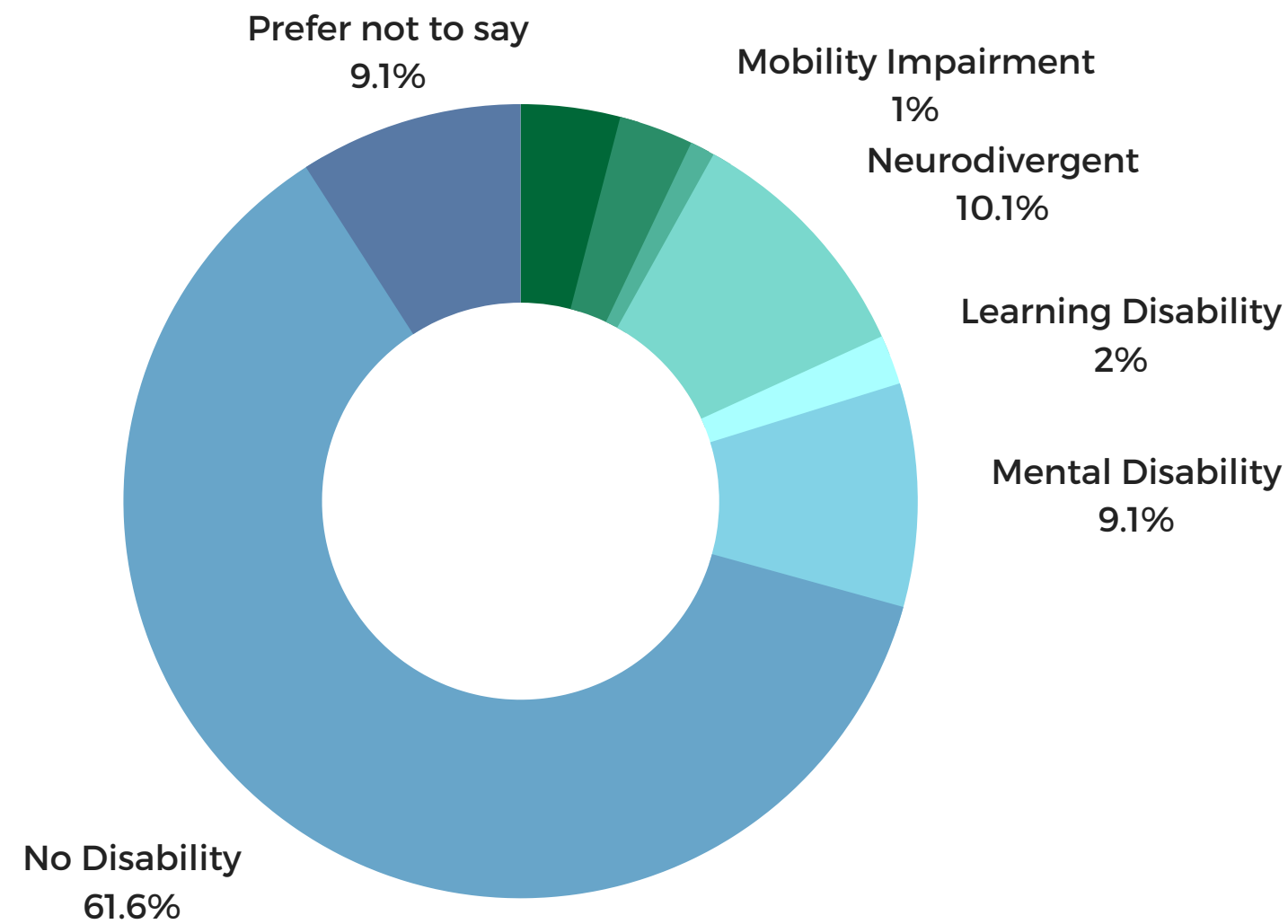
Total Pillar Satisfaction Scores

West Asian	830
Southeast Asian	739.85
African Canadian	699.67
East Asian	696
Caribbean	682
European	666.34
White	658.62
Black	655.67
Hispanic or Latinx	610.71
Indigenous	582
Prefer not to say	575.89

WHO MAKES UP THE ECOSYSTEM?

Disability Status

Proportion of Participants



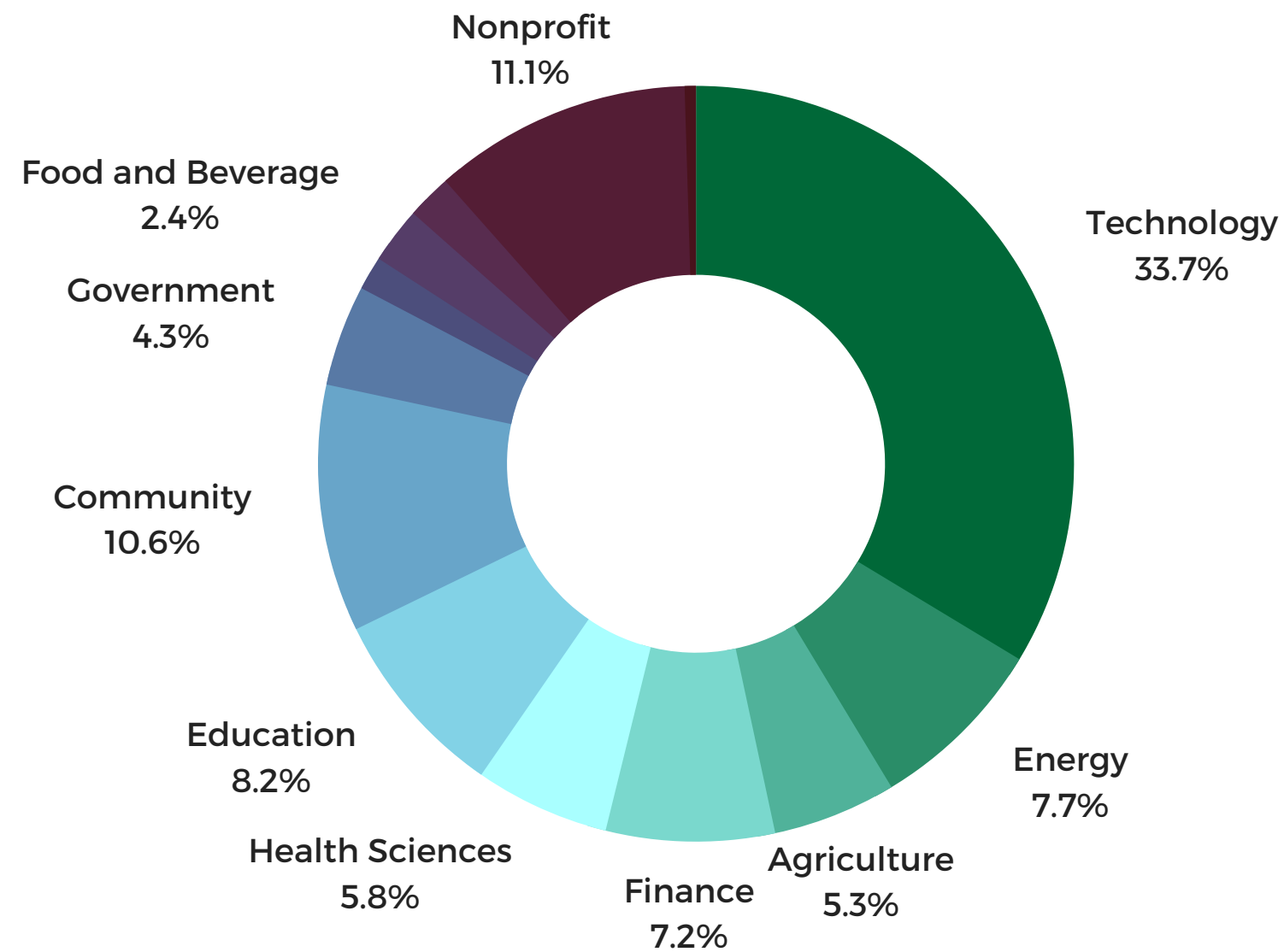
Total Pillar Satisfaction Scores

Hearing Impairment	735
Visual Impairment	679.91
Learning Disability	673.16
No Disability	663.33
Mental Disability	661.26
Neurodivergent	647.79
Prefer not to say	589.1
Mobility Impairment	563
Speaking Impairment	NA
Developmental Disability	NA

WHO MAKES UP THE ECOSYSTEM?

Industry

Proportion of Participants



Total Pillar Satisfaction Scores

Real Estate	708.8
Technology	674.59
Nonprofit	667.49
Health Sciences	666.73
Energy	663.64
Education	662.62
Food and Beverage	661.25
Community	656.64
Agriculture	656.5
Government	625.3
Finance	616.12
Entertainment	615.5