



# NOVEMBER 2021 RAINFOREST SCORECARD ASSESSMENT RESULTS

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## FOREWORD

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Reflecting on the past two years one word comes to mind, “Uncertainty”. In 2020 COVID-19 thrust the world into fear and lockdowns unlike anything most of us have ever seen in our lifetimes. While things have opened this past year, rampant inflation, supply chain challenges and war continue to leave many feeling uncertain about their future. When uncertainty is high, opportunities to solve big problems are also even more present. There is no better time for the community to come together and double-down on our strategy to diversify our economy, to onshore manufacturing through robotics and take advantage of our talent and knowledge in innovation. In the past, the Scorecard was an exercise that informs our annual Summit. Attendees got a chance to deep dive into the results and explore the opportunities and challenges facing our ecosystem. Like so many things, this year is different.

This year we explored the theme of “Telling Our Innovation Story”. It also felt appropriate to do a review on the book “The Rainforest: The Secret to Building the Next Silicon Valley” by Victor Hwang and Greg Horowitz which started the Rainforest Alberta movement. In it the author’s asked a simple question: What is it about Silicon Valley that led it to be one the most innovative cultures in the world? The question is simple, but the answer is not, and by necessity the answer draws on many different disciplines. The book contrasts the drive for predictability, precision, and production of a farm with a rainforest where randomness, serendipity, and the unforeseen cause it to thrive. However, while there is no “control” operating in the Rainforest, or in highly innovative and disruptive cultures, there are powerful principles at work and if we can get a handle on these principles, and better understand how a Rainforest might operate, then we can take those principles and embed them into any ecosystem and the result will be a culture that tends more and more toward innovation. In Alberta our Values (principles) are spelled out in the Rainforest Social Contract.

This year’s overall score on the annual Rainforest Scorecard has improved to the highest it has ever been measured at, and the Pillar scores were more balanced than ever before which is a healthy sign and demonstrates that the innovation ecosystem in Edmonton is functioning well.

Overall, this is extremely encouraging news, and this indicates that, despite the setbacks and challenges presented by COVID, the innovation ecosystem is as healthy as it has ever been. The community of entrepreneurs, service providers, government leaders, investors and other ecosystem helpers should feel proud of the progress made over the last 12 months, and we should look forward to continued progress and achievement of even greater things to come.

## ABOUT THE SCORECARD

Historically, the Scorecard Assessment has been conducted as part of the Rainforest Summit. Participants in the Summit were tasked with completing the Scorecard prior to attending the full day immersion, and the results of the Scorecard were presented and discussed as part of the agenda.

In 2017 and March 2018, these Assessments, along with the Summit, were led by consultants from Rainforest Strategies. In November 2018, Rainforest Edmonton pivoted to hosting these activities directly, and at that time, the Scorecard Assessment was opened to the community at large. Past respondents, community members who were unable to attend the Summit, and any other curious or interested party was welcomed to complete the Scorecard alongside those who were attending the Summit.

In 2020 and 2021 we were unable to host a Summit due to COVID-19, however the Scorecard Assessment was still completed. In early 2022 we held our first post-pandemic Summit, wherein we explored the 2021 Scorecard Assessment results. The Summit and Scorecard each provide context for each other, and these results are best interpreted after having attended a Summit to understand the November 2020 Rainforest Scorecard Assessment Results

Rainforest analogy, the Rainforest Pillars, and to engage in deeper conversation about what the results mean or what conclusions we can and cannot draw from these results.

The Scorecard is an assessment mechanism designed to get a pulse check on the perceptions of the community at a particular point in time and it provides an overall score out of 1000 points focused around six pillars, as described below.



## LEADERSHIP (200-POINTS)

Leadership roles are both assigned and assumed, formal and informal. Leaders must have a clear understanding of the motivations, experiences, and perspectives of all participants for the collective potential within the innovation ecosystem.

“Big L” leaders are decision-makers typically in positions to realize the potential, convey perspectives, and rally groups to influence outcomes for innovation. “Little l” leaders are the ones who, without title or explicit authority, take initiative and make things happen at a grassroots level.

If you perceived your answers for the scorecard questions being different when you consider leaders as big L versus little l, people were asked to provide clarification in the comments.



## FRAMEWORKS, INFRASTRUCTURE, POLICIES (150-POINTS)

Policy and Infrastructure is the structural landscape the ecosystem exists within, though it may change over time. Actions and interactions between organizations, departments, physical spaces, and policies play a role in enabling and supporting innovation. Policy creates the boundaries that we must both work within, and at times, push against.



## RESOURCES (150-POINTS)

Resources are foundational elements and can include tangible elements (physical) and intangible factors (including knowledge and human talent). A balance of resources available in quality, quantity, and origin can support innovative potential through both generation and implementation.



## ACTIVITIES & ENGAGEMENT (100-POINTS)

Activities and Engagement represent a measure of the vibrancy of a regional economy. Activities that are initiated on an ecosystem level (i.e., top-down) are an important signal to members about the ambition and commitment to innovation, whereas grassroots (i.e., bottom-up) activities signal the desires of the community and address underserved needs of entrepreneurs.

Activities that promote innovation and actively encourage engagement across a diverse array of participants are an essential part of a thriving innovative ecosystem.



## ROLE MODELS (100-POINTS)

There are role models across the ecosystem. They embody characteristics that others wish to emulate. They are builders, influencers, and connectors, or they may be emerging changemakers who can transform an ecosystem through inspiration. Role models can be uniquely personal and general to the community.



## CULTURE (300-POINTS)

Culture is the foundation of any innovation ecosystem. It is the shared values and actions of members in the community which ultimately determine the success of new initiatives. In the Rainforest, our culture is defined by the Social Contract. The contract sets the expectations for behavior and is reinforced when each member acts accordingly. Each person signs the Social Contract as an individual, not on behalf of an organization.

## MARCH 2022 SUMMIT

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The Rainforest Summit was held in March 2022 at the Shaw Conference Centre. A sold-out event of one hundred people attended the first, large community event post-COVID.

Throughout the day, the room was buzzing with energy as many people saw each other face-to-face for the first time in 2 years. The agenda included remarks from:

- Catherine Warren, CEO of Innovate Edmonton
- James Keirstead, Chair of the Rainforest Edmonton Steering Committee
- Mack Male, Co-Founder and CEO of Taproot Publishing
- Aaron Budnick, outgoing Co-Chair of the Rainforest Edmonton Steering Committee

Kristina Williams moderated a panel of community leaders made up of Chris Micetich, Myrna Bittner, Adam O'Brien, and Kristina Milke who explored "Challenging Narratives and Our Evolution as an Ecosystem"

Attendees were broken into small groups to discuss the topics of the day, with three working group sessions:

1. What narratives no longer serve the Edmonton Innovation Community?
2. What does Edmonton's ideal future look like?
3. How can we achieve this ideal future?

Prior to the working groups, attendees were given a brief review of the [6 Rainforest Pillars](#), and we examined the results of the Nov 2021 Scorecard Assessment.

## LEARNINGS FROM THE WORKING GROUPS

### SESSION ONE

During this session, the small groups examined the stories and narratives we tell ourselves about Edmonton, and its innovation community, along with those we hear about Edmonton, or that we share to others about Edmonton. Some of the themes from this discussion included:

- We're blue collar, including narratives like:
  - Alberta only cares about the Oil & Gas Industry
  - Oil and Gas as an industry isn't innovative
  - There is an unwillingness to change
- There is nothing going on in Edmonton and our weather is bad
- You need to leave Edmonton to be successful, including narratives like:
  - We're a small city that can't compete internationally
  - Our innovation ecosystem is too early stage
  - There is no talent or support for tech-based companies

### SESSION TWO

During this session, the groups examined what an ideal future for Edmonton looks like. People were encouraged to share their personal vision for the city, and to find some common group or themes about where we want to go. We heard:

- A desire for Province-wide collaboration and co-operation (except in sports), including:
  - People can call and connect with anyone easily
  - People give help freely
  - The community feels accessible & inclusive to all
  - More diversity & equity in ecosystem with less barriers
  - There is a high level of trust in the community
- Talent is home grown and stays in the province throughout their career
- Albertans support Alberta, including narratives like:
  - There are more Edmonton based investors
  - More Edmonton companies are getting VC funding
  - There has been the next wave of exits with founders staying in Edmonton and investing in the next generation of startups
  - Volunteerism in the community is high & there are many mentors

### SESSION THREE

During this session, the groups examined what would need to happen for their vision to become reality. We heard ideas like:

- We need a story telling champion, telling the stories of success, failure, and growth in Edmonton
- Develop a global mentorship program that brings expats back to mentor Startups
- Coordinate PSI's, students, faculty, and industry to commercialize more IP
- Help train potential investors to create a more robust ecosystem

We also heard from the group that there is a desire to see Rainforest Edmonton take a more active role, with in-person LWOL and Connector to return, a desire to see government lobbying to support innovation, and a desire for paid Rainforest staff to build a stronger community of collaboration that encourages entrepreneur first thinking.

## NOVEMBER 2021 RESULTS

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One thousand two hundred and sixteen (1216) rainforest members were invited to submit responses to the Rainforest Scorecard. We had 122 responses providing us with an 80% confidence interval at 5% margin of error in the responses.

We are continuing to see progress towards our goal of an 800 score for the Edmonton ecosystem.

We measured a score of 712 based on 122 responses. For context about this score, we have previously measured the following scores:

# RAINFOREST ALBERTA

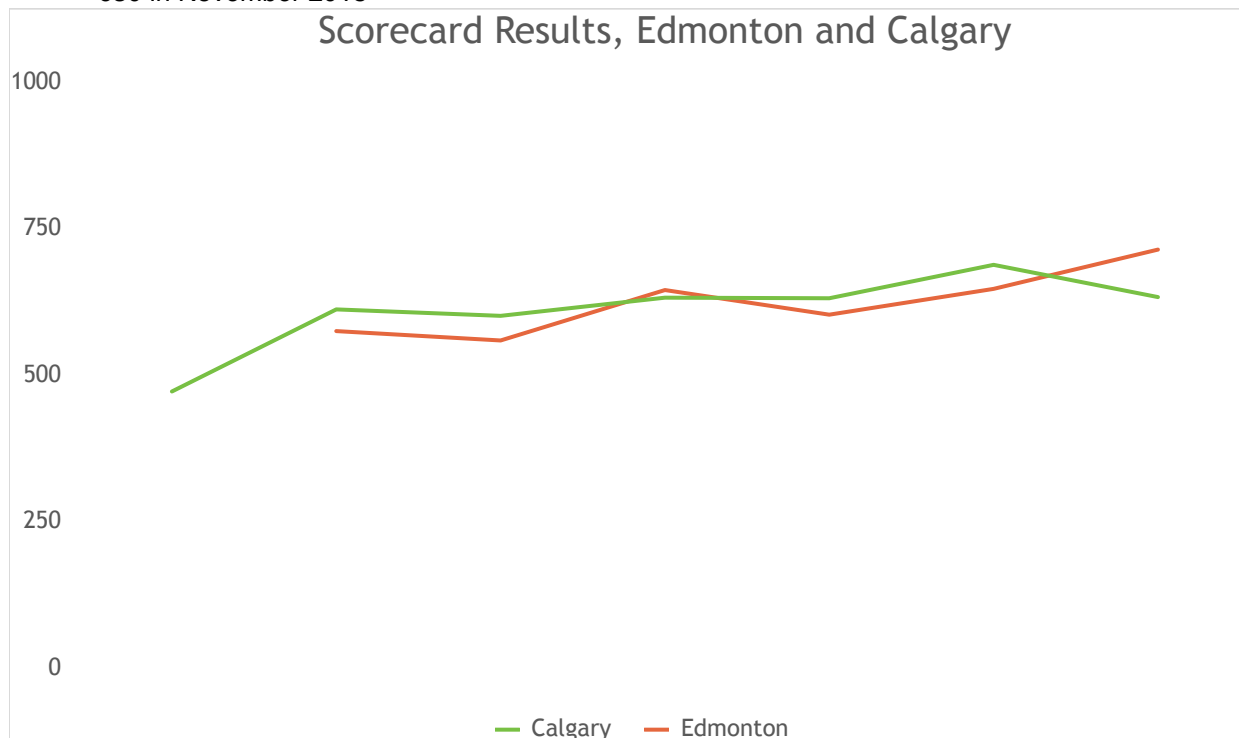
- 573 in September 2017
- 557 In March 2018
- 643 In November 2018

- 601 in November 2019
- 645 in November 2020

Rainforest Calgary measured their score at 631 this year with their historical scores being:

- 470 in September 2016
- 610 in September 2017
- 599 in March 2018
- 630 in November 2018

- 629 in November 2019
- 686 in November 2020





## RAINFOREST RADAR

The Rainforest Radar provides a different lens to inspect the Scorecard Assessment by breaking the overall score down into the 6 Rainforest Pillars and examining the average score for each pillar.

Innovative ecosystems tend towards having greater overall balance, while traditional, command and control style ecosystems tend to skew heavily towards leadership and role models, with the other pillars being repressed.

Ecosystems that tend to skew more towards high culture and activities scores, with other pillars being repressed, tend to represent more grassroots or highly transitional ecosystems. They are characterized by less coordinated leadership and little-to-no command-and-control style tactics.

The radar graph for this year's Assessment results shows a balanced overall shape, indicating that all elements of the Pillars are present in approximately equal proportions. This is a healthy sign and demonstrates that the innovation ecosystem in Edmonton is functioning well.

This balance is key to a healthy and functioning ecosystem and represents progress in Edmonton as we continue to strive towards a balanced ecosystem.

Overall, this suggests that Edmonton is rapidly reorganizing and trending in a very positive, more innovation-friendly direction.

The scores of each pillar will be explored in more detail below, looking at how they have changed over time and what factors appear to be driving these changes.

## TRENDS

As the single largest category surveyed, entrepreneurs (43% of respondents) come in close to the overall average in each pillar.

Overall, comments were generally positive and showed several opportunities for continued development in the ecosystem, but we can see three trends that emerged in the comments

1. Diversity and a need for increased diversity in the ecosystem
2. Continued development of collaboration and leadership in the ecosystem
3. Talent Attraction and Resources

### Diversity

Overall, there was significant commentary about a lack of diversity in the of the ecosystem. It was noted that more female leaders exist than in the past, however cultural and ethnic diversity was noted repeatedly to be lacking. The diversity comments ranged from there being a lack of representation for minorities and women in the ecosystem, to general comments that frequently there was lack of openness to transformational change, that often tech companies were too narrowly focused, and that there was a feeling of sameness in the ecosystem. There were also comments around the feeling of "tech bro culture" in the ecosystem. Overall, there is any opportunity to support more transformational innovators, outside of the regular tech companies, as well as reaching out and developing increasingly inclusive practices

among the Rainforest, service providers and entrepreneurs to welcome more diverse people into the ecosystem.

## Collaboration

Overall, many felt that there were some positive strides being made in collaboration, but that we need to continue this forward movement. These comments extended to needing to see more visible collaboration from everyone in the ecosystem and make this more transparent. In addition, there were many comments on leadership in the ecosystem and that there needed to be more visibility and access to some of the Big L leaders that were tech founders and had seen success. Entrepreneurs were looking for increased support and mentorship from these founders, and they were since having the potential to be more visible to all of Edmonton so that Edmontonians could learn more about what was happening in the ecosystem.

## Talent Attraction and Resources

This continues to be a challenge for most respondents. COVID has shown companies and founders that they can access talent, programs, and other resources globally. This has provided them with access to world class programming, funding, and workforce. There continues to be a challenge in attracting and retaining the right talent to support company growth. Comments also included being able to access funding locally, and not just more VC funding but support for founders in general as they try to build companies. Finally, it is noted that there are now many options for founders to access world class programming virtually that they could not before, so how would Edmonton programs and services be competitive for founders?

## OPPORTUNITIES

There were several opportunities identified

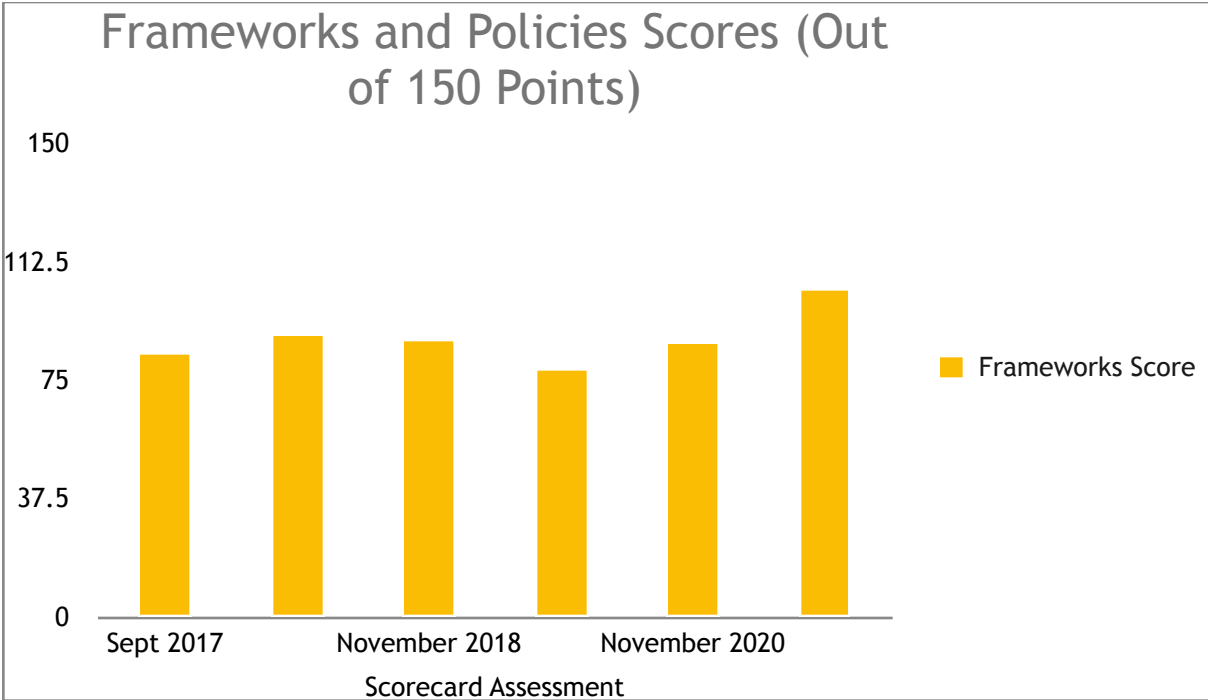
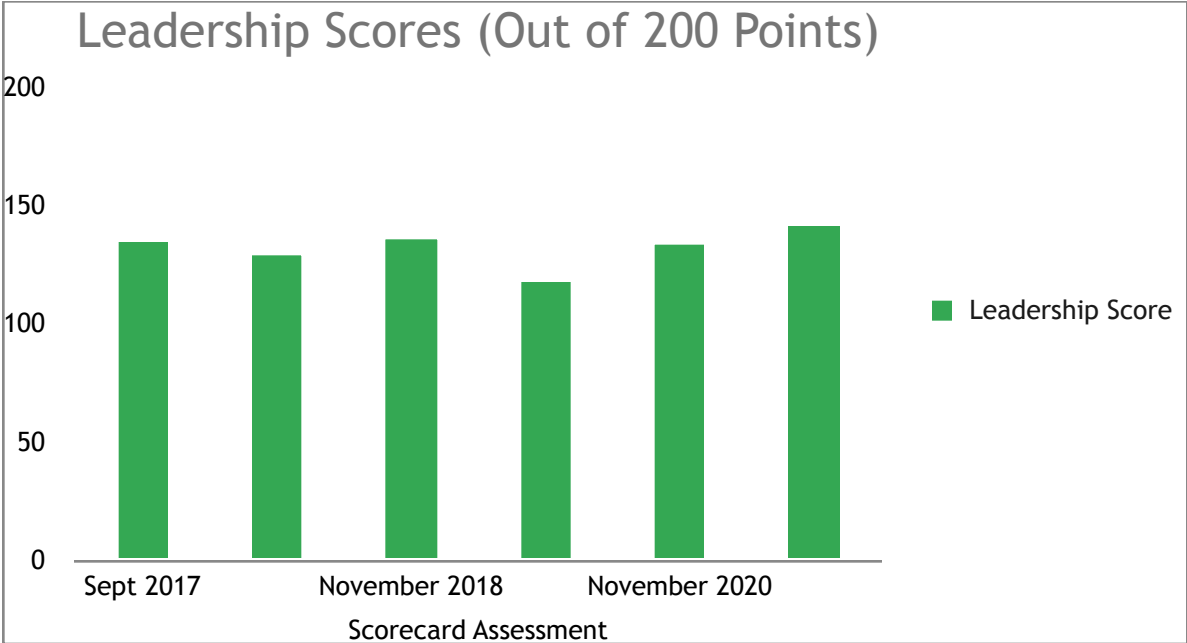
- More programs dedicated to sales and marketing to attract customers.
- More money directed from intermediaries to directly support entrepreneurs and their ventures; and
- More access to the best programming available worldwide.
- Increased visibility to the entire Edmonton community on the success of the tech ecosystem.
- Increased access to Big L leaders who have founded and are building successful companies.
- Increased collaboration between Edmonton and Calgary
- Build a stronger culture of risk taking and openness to transformational change and support for founders that are not traditional “tech” companies

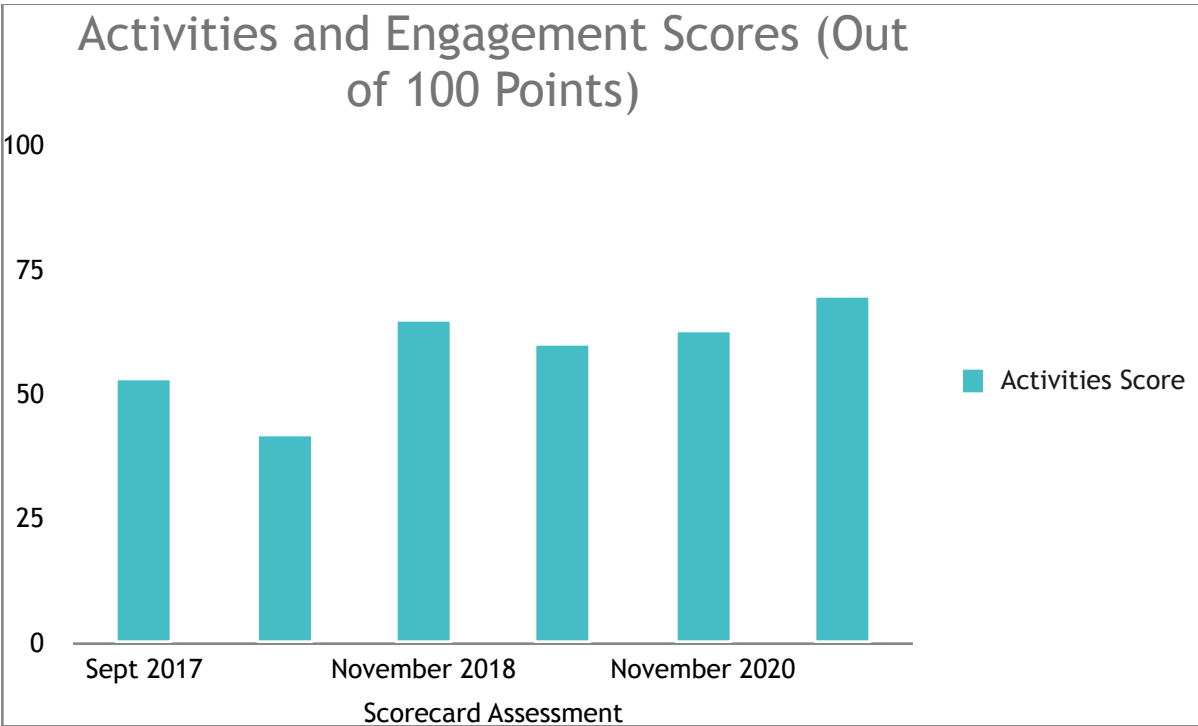
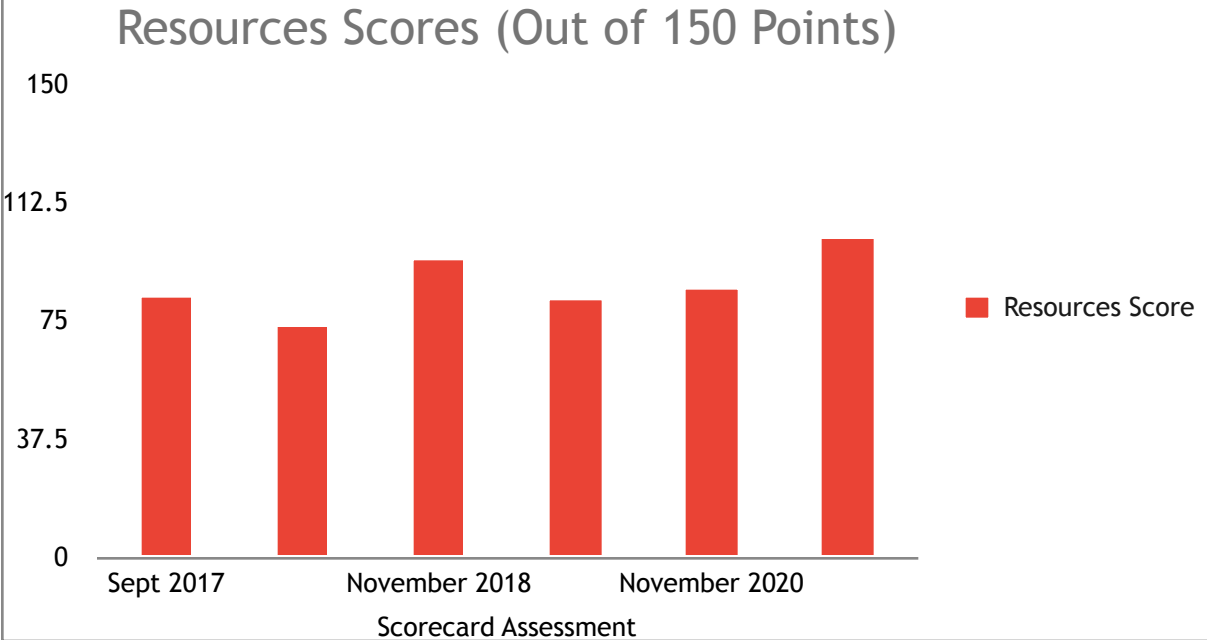
Additionally, entrepreneurs want to see more open and transparent collaboration and decision-making, with real, accessible, and responsive opportunities to provide feedback.

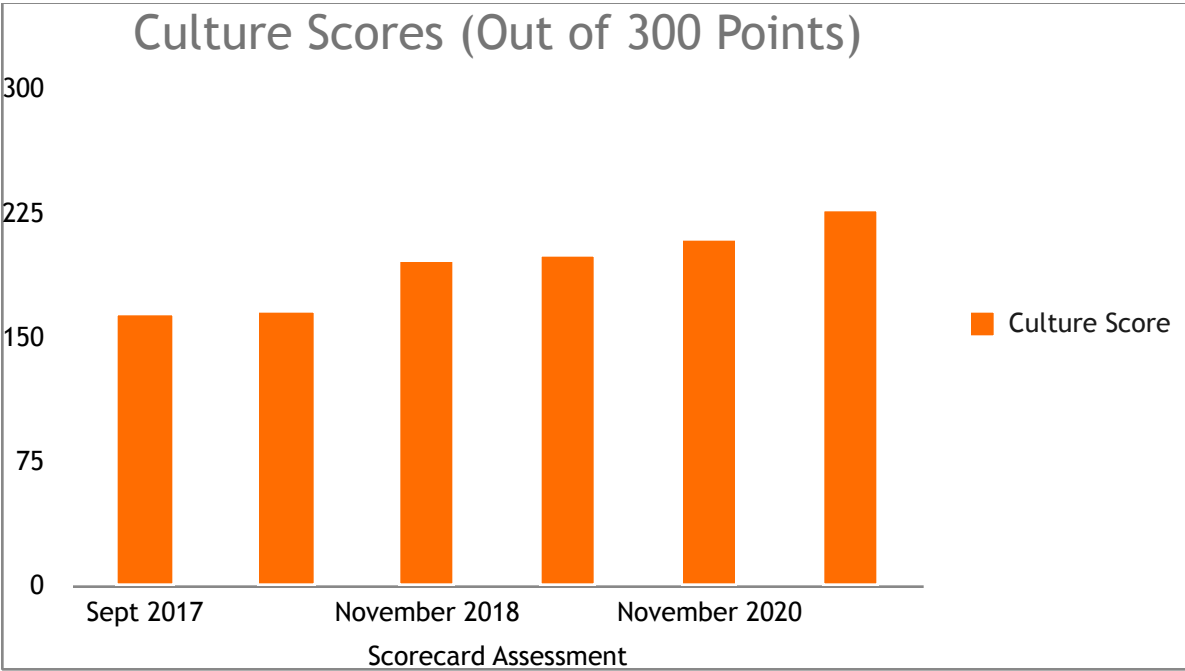
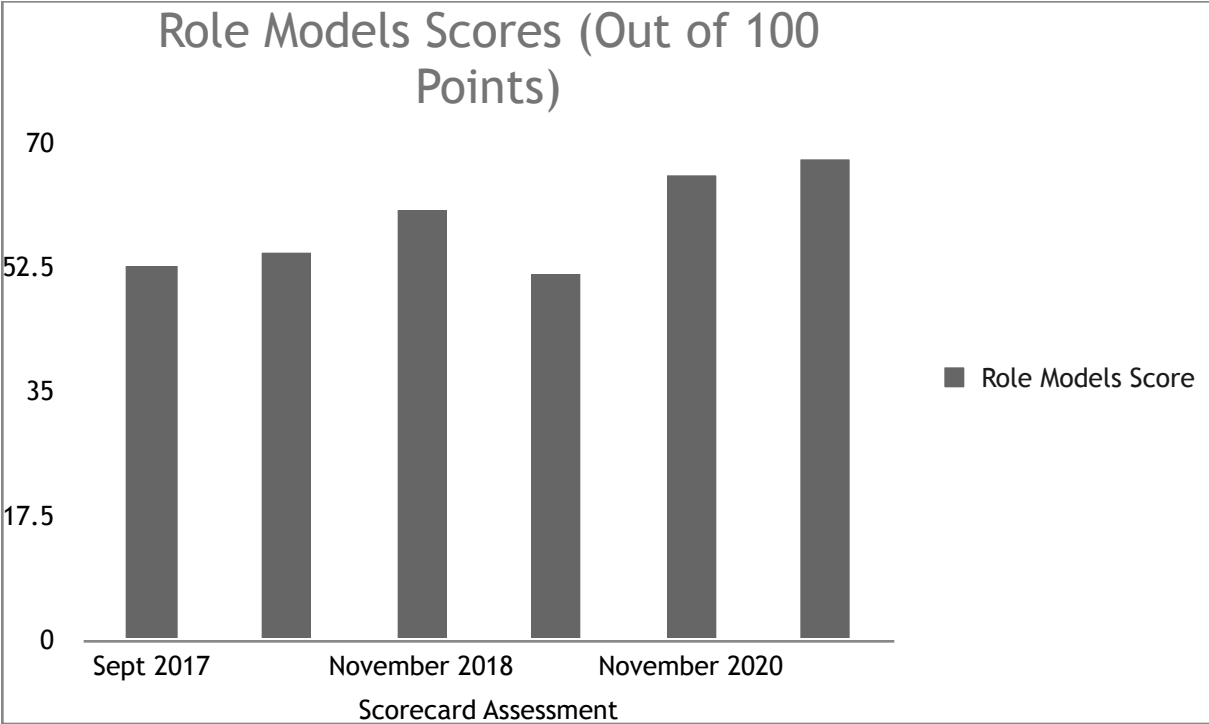
## PILLAR ANALYSIS

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Although the overall score improved drastically for the most recent sample, it is quite important to look at the changes in score by each of the 6 Rainforest Pillars. The graph below shows how the scores for each of the pillars have changed over time.







**TAKEAWAYS**

As we continue on the path to 800, ongoing success for the innovation ecosystem will require positive collaboration and engagement between all parties. Although many initiatives are just getting underway, projects need to become long term, recurring, and meaningful engagements between innovators and those that work with them to ensure a shared understanding of how we can build the most effective innovation ecosystem.



## FINAL REMARKS

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I am excited that this year's report shows the ecosystem continues to better support innovation. I am also thrilled that the community continues to look to the values within the Rainforest Contract and is aligning objectives accordingly. I have seen firsthand how those values have brought people together to solve issues impeding innovation in our community. Great ideas like IMyeg's mission to help academia commercialize more of the brilliant intellectual property developed in our post-secondary institutions. My friend Chris Micetich along with Debra James from the U of A proposed this idea to entrepreneurs across the province and more than forty mentors jumped on board to help make it a reality, or mentoring for Startup Edmonton's Propel 12-week pre-accelerator program which helps Startups advance their business models and connects them with entrepreneurs to pitch their ideas and garner feedback, or listening to the buzz in the community from the introduction of four world class accelerators. To me it feels like something has changed and I am hopeful that it is our community starting to hit the exponential growth curve.

As this report and the corresponding Rainforest Summit identified, we have so many opportunities to fill gaps, celebrate diversity, add mentors and investors, and build an even stronger culture of risk taking that is so prevalent in communities like Silicon Valley.

Now is not the time to rest on our success to date. Now is the time to double down. Now is the time to get involved. Help out by, mentoring, volunteering at an event, or on a committee. Attend an event and help the community by giving emerging entrepreneurs the advantage of your experience. Take someone for coffee and pay it forward. Think win-win, build your own community, and most importantly, never stop innovating.

For more information, please visit [www.rainforestyeg.ca](http://www.rainforestyeg.ca). Do you have comments/questions, see something different in the data, or want to help make the next assessment more scientific/representative? Contact [rainforestyeg@zoho.com](mailto:rainforestyeg@zoho.com).

## APPENDIX: BACKGROUND INFORMATION & METHODOLOGY

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### ABOUT RAINFOREST ALBERTA

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*A rainforest is a wild, untamed place where the conditions are conducive to healthy new things emerging, growing, and evolving all on their own.*

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Rainforest Alberta is an informal organization of people working together to create a climate of innovation in the province. Rainforest groups in Edmonton and Calgary want Albertans to know that they don't have to move away to invent, prosper, and push their ideas forward. The goal is to create a similar environment to the invisible infrastructure that underlies successful tech communities like Silicon Valley, Denver, or Boston.

Typically, farms or factories are used as metaphors for generating consistent business outcomes. These are two environments where control and proven methods define and perfect expected results. However, to try to control innovation in this way is to stifle it and to restrict its potential. Innovation thrives in an environment more like a rainforest: a wild, untamed place where the conditions are conducive to healthy new things emerging, growing, and evolving all on their own.

And although investment dollars and big acquisitions make for great headlines, Silicon Valley and other dynamic innovate environments have demonstrated that a healthy culture of innovation is essential to Alberta's innovation ecosystem not just an influx of money. The culture of the Rainforest is expressed in its **Social Contract** - a document that defines how the members engage with each other in the Rainforest context.

For further information about the contract and the Rainforest efforts, please visit [Rainforest Alberta - YEG](#).

## COMMON LANGUAGE

A common language is crucial for meaningful communication. In this spirit, we offer the following definitions understanding they are open to interpretation.

### INCLUSION

We are open and welcoming to those who live and express the Rainforest Values and we seek to be equitable, fair, and transparent. Innovation requires diversity in opinion, thought, experience, cultural background and demographics like age and gender, among others. As a member of the Rainforest, you are not excluding yourself from any other community or initiative. We seek to be a harmonious compliment to other aligned initiatives.

### ENTREPRENEUR

Rainforest is focused on supporting entrepreneurs who use innovation as a competitive advantage. Entrepreneurs are those risk-taking visionaries who build new things and change the way everyone else looks at the world. Entrepreneurial ventures often have unproven business models, may not be in an established industry, or may attempt to disrupt the status quo of an industry.

### INNOVATION

Innovation is more than the novel application or creation of technologies or processes. Innovation without commercialization is invention, basic research, or charity. Innovative companies believe that there is a better way to build something or find ways to do things smarter and seek to make generate an economic return from these advantages. Innovation is everywhere and it has never been more important to celebrate, amplify and support it for the social and economic benefit of everyone.

### SECTOR-AGNOSTIC

We believe that innovation and technology are not industries or sectors in and of themselves but are pillars of prosperity across all industries. We equally embrace innovation within existing industries such as oil and gas for its potential to disrupt current processes and ways of thinking, resulting in more efficient or effective ways of generating economic return.

### EGO-SHRINKING

Ego-shrinking doesn't mean that we shouldn't celebrate our success, or the success of others. It means we are humble, open to feedback and seek the best path forward. Working towards the collective good means knowing when to lead, follow, or collaborate and we seek cooperative participation to support collective prosperity.

### ECOSYSTEM-BUILDING

We recognize that an ecosystem exists and that we stand on the shoulders of those who came before us. Growing an ecosystem requires nurturing of diverse thoughts and opinions and sharing information quickly and openly. To achieve high growth potential of innovative companies requires trust among many individuals.



## ENTREPRENEUR-FOCUSED

Entrepreneurial activity is the momentum of the community. Entrepreneurs' actions and decisions reinforce the strength of support services, community mentality, and ecosystem health. Learning in and learning from entrepreneurs creates continuity for present and future risk-taking and successes for other entrepreneurs.

## SOCIAL-BARRIER-SMASHING

The community believes everyone should have the right to test ideas, access resources, and contribute to a better future regardless of gender, age, race, religion, background, upbringing, creed, or cause. We encourage challenging of the status quo with justice, equity, and opportunity as underlying core values.

## COLLABORATION

Collaboration is the process of working together to achieve mutual goals or objectives by acknowledging differences and embracing commonality. It requires commitment, focused action, integrated communication, coordinated efforts, and cooperative activities.

## METHODOLOGY

Participants were asked to respond to a series of questions meant to gauge the perception towards an aspect of each of the six pillars. The questions were scored on a scale of 1-10 (with 1 being Strongly Disagree and 10 being Strongly Agree). The total score from each respondent was calculated for each Pillar and normalized to the maximum possible score for that Pillar, as listed above. These normalized scores were added together to provide an overall score for everyone's submission.

There were improvements made to the scorecard in this iteration based on feedback from the community provided at past Summits, in past Scorecards, and through other direct means. Participants were provided with the definitions of the pillars to assist their interpretation of the questions. The questions were also slightly updated to improve clarity and updated to provide greater consistency with those questions asked by the Calgary team in their Scorecard Assessment. For comparative purposes, the total score from each participant was adjusted to remain consistent with past scorecard assessments and with the overall point assignment as suggested in The Rainforest book, and respondents were asked for demographic information, including their role within the innovation ecosystem.

There were many individuals who identified themselves as having multiple roles in the ecosystem. Consistent with the past analysis', we split those responses so that their score was duplicated for each role they identified to properly analyze the scores by role in the ecosystem. This had a minimal effect on the overall score, increasing it by one point from the non-split 'pure' score.

## DEMOGRAPHIC INFORMATION

We gathered basic demographic information to better understand how people of different socioeconomic backgrounds perceived the innovation ecosystem, as well as some extended demographics that relate to the role of an individual within the ecosystem. These include:

- Role in the Innovation Ecosystem, with valid options being:
  - Entrepreneur
  - Investor (Angel or VC)
  - Ecosystem Helper/Employee of an Entrepreneur Support Organization
  - Employee of a for-profit entity
  - Government Representative or Employee
  - Student
  - Academic/Researcher

- Consultant, Professional Services, or Traditional Financing Agency
  - Other
- What is the nearest major center to you, with valid options being?
  - Edmonton
  - Calgary
  - Red Deer
  - Lloydminster
  - Lethbridge
  - Grande Prairie
  - Fort McMurray
- Where were you born, with valid options being?
  - Current Location
  - Elsewhere in Alberta
  - Elsewhere in Canada
  - Outside of Canada
- How long have you been in this location, with valid options being?
  - Less than one year
  - 1-3 years
  - 3-5 years
  - 5-10 years
  - More than 10 years
- To what age group do you belong, with valid options being:
  - Under 18
  - 18-25
  - 26-35
  - 36-45
  - 46-55
  - 56-65
  - Over 65
- What is your biological sex, with valid options being?
  - Female
  - Male
  - Intersex
  - Transgender
  - Other
- What is the highest level of education you have completed, with valid options being?
  - Less than High School
  - High School/GED
  - Associate, Professional or Technical Degree
  - Bachelor's degree
  - Master's degree
  - PhD
- What is your ethnic background, with valid options being?
  - Black
  - Latino
  - East Asian

- South Asian/Indian
- Middle Eastern
- Native American
- Caucasian

The provided results were verified to ensure that they matched up with the definitions used within to ensure consistency of results (for role within the ecosystem), and all personal demographic questions allowed for a Prefer Not to Answer responses.

There were several “other” write-ins and some suggestions for future demographic questions such as Sexual Orientation, which will be added in future Scorecards and were unintentionally omitted.