EndPovertyEdmonton
Inclusive Economy Evaluation
May 2022 to June 2023

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With thanks to the Inclusive Economy Team

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Main Message

Intent

This is a report about the Inclusive Economy Team's work in learning and testing strategies for systems change that will build toward an inclusive economy in Edmonton. This report is for EPE funders, staff, and others committed to using their efforts to target the root causes of poverty in the context of an inclusive economy.

The Team

EndPovertyEdmonton is organized and staffed through six Game Changers; Inclusive Economy is one of these Game Changers. The team that staffed the Inclusive Economy Game Changer, including economic reconciliation, includes Karen Bruno, Susannah Cameron, Brooks Hanewich, and Andrea Streisel.

The Approach

The Team was set up as a "fourth space" actor, meaning it is connected to but independent from industry, government, and other non-profits that offer programs. This position has allowed the Team to do systems change by highlighting, challenging, and tackling the pressing and interlocking issues that inhibit an inclusive economy in Edmonton. Indeed, the Inclusive Economy Team's work—distinct from anyone's in the City—leads to long-term solutions rather than short-term fixes. They work to adjust or transform policies, practices, relationships, power dynamics, social norms, and mindsets that underlie poverty and the economy. With this work, we foresee Edmonton becoming a national leader in building an inclusive economy.

Key Findings

In service of systems change, the Inclusive Economy Team's strongest areas of work and success has been in building networks with and between inclusive economy actors in Edmonton. The Team functions best when it is catalyzing opportunities for partnerships between non-profit organizations, government, and industry. In doing so, the Team has been able to identify, test, and then adapt innovative strategies with partners. As strategies are tested, and connections between network members strengthen, so too does the feasibility of joint advocacy and strategy that will build an inclusive economy in Edmonton. Please see the body of the report for details.

Reading the Report

The report documents the work done within each strategic priority. Strategic priorities, however, are not mutually exclusive. Findings (e.g., advocacy, social procurement) may be detailed under one strategic priority but also belong under another. We have tried to be comprehensive but not repetitive. Likewise, systems change is not linear. We outline strategy in a linear way for readability, including the 7 images that track particular activities. However, it is critical to remember that these activities unfold organically over time, with small outcomes building on each other. See the image on p. 8 that captures how the Inclusive Economy Team approached their systems change work.

Conclusions

The Inclusive Economy Team is a trusted, credible, and much needed resource in Edmonton. They are also indisputably national leaders in building an inclusive economy. Their work is bold and innovative—work the city needs to be proud of. They are naturally experimental; this is how systems change work is accomplished. This report provides a foundation for the next phase of their work in building Edmonton's inclusive economy.

Executive Summary

EndPovertyEdmonton (EPE) is a non-profit organization born from the Mayor's Task Force to End Poverty with a mission to work at a systems-level to eliminate poverty in Edmonton. The Inclusive Economy Game Changer is one of the six Game Changers through which EndPovertyEdmonton works to generate systems change.

An inclusive economy is an economy that works for everyone. Economic approaches are inclusive when they provide: 1) opportunities for everyone to participate in the economy; 2) an equal distribution of the benefits and harms of economic activity, and 3) opportunities for people to participate in decision-making about the systems that affect them (Munro, 2020). In this spirit, the Inclusive Economy Team brings together partner organizations and collaborators to advocate for inclusive economic policy changes, strategies, and approaches.

This evaluation report assesses the Inclusive Economy Game Changer activities in 2022-2023. Developed in partnership between the Inclusive Economy Team and the Community-University Partnership (CUP), this report identifies progress made within the inclusive Economy strategic priorities, describes the evaluation process, and offers analysis and possibilities for future directions for their work in promoting an inclusive economy. This evaluation report was created to share strategic knowledge that can influence businesses, industries, non-profits, and governments, which can enhance economic practices and policies that support the building of an inclusive economy in Edmonton.

When dealing with complex systems change processes, tracking progress can be challenging due to less tangible and unmeasurable outcomes. Therefore, the evaluation uses a community-based participatory approach structured around strategic learning. In other words, this evaluation tracks what the Inclusive Economy Team *learned* over the 2022-2023 period and how it informed their strategy. We collected data (i.e., documents, meeting notes, interviews, and staff work plans) from May 2022 to June 2023 and have drawn our findings from analyzing these materials as a whole. The Inclusive Economy Team's primary goal is to convene partner organizations/collaborators that will advocate for inclusive economic policy change, strategies, and approaches. To reach this goal, the Team had set 7 strategic priorities for the 2022-2023 year. We tracked 6 out of 7 of these strategic priorities, with the remaining strategic priority being tracked through EPE's internal communications department. The 6 strategic priorities tracked by CUP for EPE, with their successes and challenges, are as follows:

Strategic Priority 1: To build networks to share information, provide mutual support, & advocate for inclusive economy policies

In the 2022-2023 evaluation year, the Inclusive Economy Team actively expanded their network, fostered connections, and constructed awareness and knowledge within Edmonton's inclusive economy landscape. By understanding various stakeholders' activities, EPE has made significant progress. They facilitated collaboration between business/industry (e.g., Delnor, A&H Steel, Buy Social Canada), government (e.g., City of Edmonton, Government of Alberta), and nonprofits (e.g., Explore Edmonton, Action for Healthy Communities), which enhanced the Team's systems-level poverty initiatives and furthered their policy advocacy skills. They excelled in building these networks. Now, with these networks in place, the Inclusive Economy Team can focus on building more actionable partnerships with the many groups and organizations the Team has already been networking with. This strategy would continue to solidify the Inclusive Economy Team's role as a credible and trusted network broker between the non-profit, private, and governmental sectors, and with this they could continue to lead inclusive economic efforts in Edmonton.

Strategic Priority 2: To advocate for the adoption & implementation of inclusive economic approaches and plans within Edmonton's economic development sector

The Inclusive Economy Team's advocacy efforts with different levels of government (i.e., the City of Edmonton, the Government of Alberta, and the Government of Canada) on behalf of industry and non-profits have been successful. Their efforts included supporting the adoption of a social procurement strategy at the municipal level (within and in addition to the City of Edmonton's Economic Plan), pushing for community employment benefits (CEB) recommendations and accountability at the federal level, and properly timing policy "asks" at the provincial level. Through these advocacy efforts, the Inclusive Economy Team strengthened relationships with municipal government officials and identified the appropriate channels and key individuals for federal level policy advocacy. The Inclusive Economy Team's next steps are to create a work plan for policy advocacy goals (especially at the provincial and federal levels) and ensure that the first steps of an advocacy project are action-oriented and concretely communicated to their partners.

Strategic Priority 3: To advocate for the adoption & implementation of economic reconciliation approaches

One of the core and unique accomplishments within the third strategic priority is the Inclusive Economy Team's growth in terms of their own economic reconciliation learning and relationship-building, which was led by the Indigenization Team. With this key work setting a foundation, the Inclusive Economy Team began external economic reconciliation work. The Team worked in collaboration with partners from Indigenous-led or -serving organizations (such as Edmonton's Indigenous business and professional association AKSIS, REACH, and Explore Edmonton) in Edmonton to develop an agreed-upon definition and strategies for economic reconciliation. These efforts helped to form the Economic Reconciliation Stewardship Group and the next steps are to formally establish this group to implement and/or experiment with strategies that will advance economic reconciliation.

Strategic Priority 4: To identify the economic systems & policies we want to change, develop a process/plan towards this change, & test options for inclusive economic approaches

The fourth strategic priority has been achieved through the Inclusive Economy Team's experimentation with different key initiatives, developing Edmonton-specific models, and gaining insights into areas that most require policy change. The two models that the Inclusive Economy Team focused on in 2022-2023 are the liaison support initiative (which connected local construction business Delnor with several local workforce development agencies) and the apprenticeship cohort initiative (in partnership with a local construction business, A&H Steel). Through the A&H Steel cohort model initiative, changes in hiring and communication processes within the construction industry led to employment for individuals facing employment barriers. Unfortunately, these individuals were laid off after 7 months due to a shortage of work resulting in unanticipated summer layoffs. The need to focus on retention for these employees will guide future strategies and advocacy, contributing to progress in system change efforts for an inclusive economy.

A definite strength of the Inclusive Economy Team lies in identifying policies for change and testing inclusive economy strategies, and we agree that their efforts in this area should be continued and fully supported. The Team's goal of gaining a better understanding of the working poor demographic in Edmonton was postponed this evaluation year, prompting a need for reassessment to determine its relevance moving forward.

Strategic Priority 5: To engage in strategic learning about efforts in inclusive economy to ensure decision-making is evidence-informed

Strategic Priority 5 has also seen progress as the Inclusive Economy Team engaged in continuous reflections and adapted decision-making based on their learning. One area of growth for making evidence-informed decision-making that the Team identified is to work more consistently across Game Changers. This will improve organizational consistency within EPE and prevent projects from becoming isolated or "siloed" from one another. There is also a growing need for EPE staff to feel connected to their organization as a whole, emphasizing the importance of strong governance and leadership to navigate the challenges of systems change effectively. Additionally, the Inclusive Economy Team identified that it is important they use their limited time to focus on being connectors and conveners, rather than embedding themselves in any particular community of practice that could monopolize their time with limited outcomes.

Strategic Priority 6: To share learning with key players in the workforce development and social procurement space to raise awareness about the Inclusive Economy Team's work in building an inclusive economy

The Inclusive Economy Team actively engaged in various community gatherings, formed further connections with the City of Edmonton and supported businesses interested in social procurement and workforce development (such as global construction conglomerate Marigold Infrastructure Partners hired to build the West LRT line). Specifically, they promoted community employment benefits (CEB) accountability measures to municipal and provincial levels of government; shared their advocacy learnings locally and with national working group Buy Social Canada's Community of Practice; assisted Embers, a social enterprise agency, being established in Edmonton; and improved communications between EPE and the general public. The Inclusive Economy Team is acutely aware of the polarization between various interest groups (e.g., non-profit and private sectors) and works skillfully on finding a common ground between these groups, particularly in activities like social procurement. In service of systems change, the Inclusive Economy Team functions best when it is catalyzing opportunities for partnership between non-profit organizations, government, and industry.

Introduction

This evaluation was conducted by Community-University Partnership (CUP) researchers from the School of Public Health. This evaluation tracks EndPovertyEdmonton's (EPE's) Inclusive Economy Game Changer's work and progress over the 2022-2023 year. However, given that system-level work builds on the work done in previous years, we have included relevant parts of the Inclusive Economy Team's progress over past years to contextualize current work. In this report, we detail the 6 strategic priorities of an inclusive economy as pursued by the Team, outline the methodology and methods of the evaluation, provide an analysis of the Inclusive Economy's Teams work over the evaluation period, and outline future possibilities for their work. In addition to these main components of the evaluation report, we include discussion of the CUP-EPE partnership. This evaluation is a product of continual collaboration between EPE, their partners, and CUP.

EndPovertyEdmonton

EndPovertyEdmonton is a non-profit organization that emerged out of the Mayor's Task Force to End Poverty and the Aboriginal Round Table (now called the Indigenous Circle). In 2016, EPE's Strategy and Roadmap were approved by Edmonton City Council. EPE hired staff in 2017, and the initiative began operating independently of the city (EndPovertyEdmonton, 2023b). EPE's mission is "to convene, coordinate, and broker innovative partnerships, advocate for policy changes, and build the capacity of Edmontonians to take action to end poverty" (2023b).

Key Components of the Inclusive Economy Game Changer

An inclusive economy is an economy that works for everyone. Economic approaches are inclusive when they provide: 1) opportunities for everyone to participate in the economy; 2) an equal distribution of the benefits and harms of economic activity, and 3) opportunities for people to participate in decision-making about the systems that affect them (Munro, 2020). Inclusive economic approaches provide equal opportunity to all people, including those living in poverty, while also addressing the causes of poverty and income inequity (Lee, 2019; Utting, 2015). For the Inclusive Economy Team, creating an inclusive economy means ensuring that all Edmontonians have access to meaningful economic opportunities, whether through employment, self-employment, and/or benefits (e.g., health insurance, paid vacations and sick days, parental leave).

Poverty as a Wicked Problem

It can be helpful to think about poverty as a "wicked problem." Wicked problems are complex and ill-defined (Rittel & Webber, 1973). Because of these characteristics, wicked problems (such as poverty or climate change) cannot be easily solved "but are reliant instead upon 'elusive political judgment for resolution…over and over again'" (Ritter & Webber, 1973, as cited in Crowley & Head, 2017, p. 541). Understanding poverty as a wicked problem helps us rightly recognize it as an "issue with multiple causes within complicated and dynamic social and political contexts" (Lawrence, Bishop & Curran, 2019, p. 541). This has significant implications for research, evaluation, and policy work regarding poverty.

Economic Reconciliation

Part of creating an inclusive economy is bringing about economic reconciliation. EPE has developed its own definition of economic reconciliation. The Indigenous Circle approved the definition in July 2023. This definition is as follows:

> *EndPovertyEdmonton believes economic reconciliation must be grounded in treaty understanding to establish (equitable/beneficial) relationships between Indigenous and non-Indigenous people and the land. To do this, Indigenous knowledge must be taken as a guiding approach to identify balanced sustainable solutions and actions so all our relations thrive.*

An inclusive economy requires working in relationship and partnership with Indigenous people and allies in Edmonton to advocate for the adoption and implementation of economic reconciliation approaches.

Systems Thinking and an Inclusive Economy

A system is a "set of actors, activities, and settings that are directly or indirectly perceived to have an influence in or be affected by a given problem situation" (Foster-Fishman et al., 2007, p. 198). Multiple systems can be interlinked, overlapped, or have unclear boundaries. Correspondingly, complex systems can involve interactions between multiple people, organizations, governments, institutions, and cultures (Bicket et al, 2020). For example, the systems that uphold poverty involve multiple levels of government (municipal, provincial, federal), economic, justice, health, environmental, cultural, and social service structures, as well as laws, policies, relationships, and social norms.

EndPovertyEdmonton (and the Inclusive Economy Game Changer) works at the level of systems change by tackling the root causes, rather than the symptoms, of an issue.

Ending poverty requires adjustments or transformations in policies, practices, relationships, power dynamics, social norms, and mindsets that underlie poverty. This is where “systems thinking” becomes important. Systems thinking involves trying to understand the relevant system in place as solutions are created. In other words, systems thinking “informs which systemic goals we should set [...] by helping we focus on the structures and dynamics that lead to social problems in the first place” (Mühlenbein, 2018, para. 14). Systems thinking is crucial for systems-level work, especially for an issue as complex as poverty elimination. This is because trying to end poverty without looking at the interconnected systems that keep it in place will only result in short-term fixes, rather than long-term solutions.

Systems related to creating an inclusive economy include industry, business, government (including policies and administration; municipal, provincial, federal, Indigenous), economic development and social enterprises, as well as community organizations and agencies. With their knowledge of the systems creating economic poverty, the Inclusive Economy Team is employing systems thinking to design, test, and implement strategies to create system change.

EndPovertyEdmonton Inclusive Economy Game Changer: Primary Goal and Objectives

This evaluation tracks the learning of the Inclusive Economy Team within the Inclusive Economy Game Changer. A Game Changer has the potential to contribute to ending poverty in Edmonton. Within the Inclusive Economy Game Changer, the primary goal is to convene partner organizations/collaborators that will advocate for inclusive economic policy change, strategies, and approaches. To reach this goal, the Inclusive Economy Game Changer is organized into seven strategic priorities:

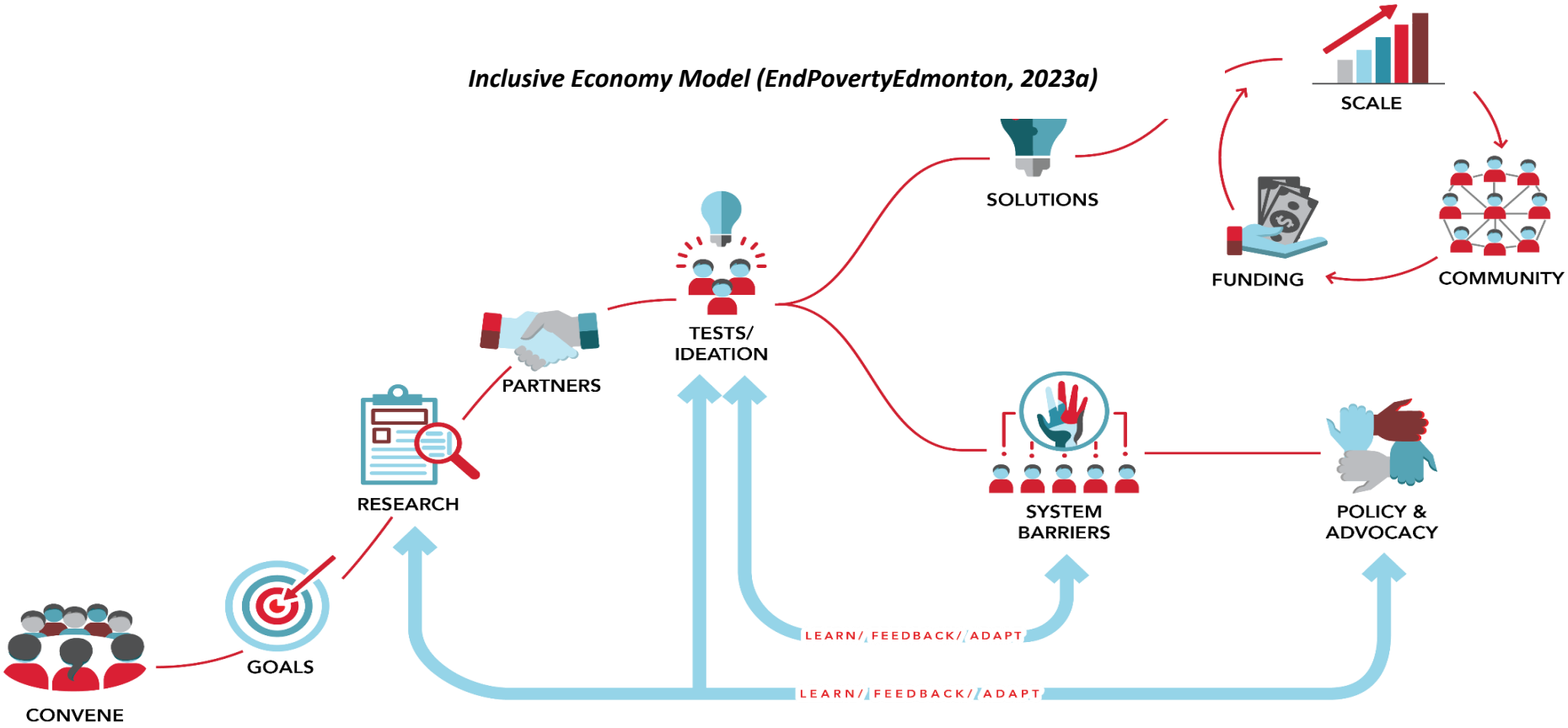
1. To build networks to share information, provide mutual support, & advocate for inclusive economy policies
2. To advocate for the adoption & implementation of inclusive economic approaches and plans within Edmonton’s economic development sector
3. To advocate for the adoption & implementation of economic reconciliation approaches
4. To identify the economic systems & policies we want to change, develop a process/plan towards this change, & test options for inclusive economic approaches
5. To engage in strategic learning about efforts in inclusive economy to ensure decision-making is evidence informed

6. To share learning with key players in the workforce development and social procurement space to raise awareness about their work in building an inclusive economy
7. *To increase communication about learnings & promising practices to raise awareness about the role of workforce development in building an inclusive economy**

**Not tracked in this evaluation: This strategic objective was measured by EPE's communications department.*

The following infographic captures how the Inclusive Economy Team works toward systems change.

Inclusive Economy Model (EndPovertyEdmonton, 2023a)



CUP-EPE Partnership

Over the last 4 years, the Community-University Partnership for the Study of Children, Youth and Families (CUP) at the University of Alberta has collaborated with EPE to address some of EPE's research and evaluation needs. In light of the COVID-19 pandemic and the urgent need to examine economic recovery and long-term economic stability, our research and evaluation team studied the implementation of inclusive economic strategies. In doing so, we tracked these strategies so that the Inclusive Economy Team can advocate to business, industry, and governments to improve economic practices, programs, and policies that will ultimately inform the creation of an inclusive economy. Our partnership is committed to co-creating knowledge-based solutions to mitigate poverty and advance an inclusive economy in Edmonton.

One important component of this partnership is the dynamic of CUP researchers as neither fully internal nor fully external evaluators. External evaluators are often hired much like external consulting firms (requiring them to acclimate quickly to the challenges and strengths of the organization or workplace requesting evaluation services), while internal evaluators are situated “in house” and are privy to much of the organization’s/workplace’s activity. As evaluators that are neither a part of the EPE staff nor part of a private evaluation agency, CUP researchers are uniquely positioned. For instance, challenges that come with this dynamic are like those faced by external evaluators: we do not always have a clear sense of the activity that we need to evaluate. However, a strength of being more internally facing but not internal to the organization is that we are accessible to the EPE staff, have built trusting relationships, understand the context, and can provide them with useful information that reflects their ongoing work.

Evaluation Context

Advancements in Inclusive Economy Evaluation Strategy

The previous evaluation strategy (2019-2022) and plans for the Inclusive Economy Game Changer were grounded in collective impact theory. Collective impact is a structured approach to creating social change (Kania & Kramer, 2011; Cabaj & Weaver, 2016). Although the work of EPE was initially based on this theory, it did not provide direction needed to work from the team's efforts at designing, testing, and implementing strategies to create system change. In addition, collective impact did not align with the Inclusive Economy team's practice or perspectives, resulting in tensions between the evaluators and the Inclusive Economy Team. Together, during the spring/summer of 2022, we addressed this challenge by co-developing a new evaluation framework and evaluation methods, grounded in strategic learning.

Furthermore, some past evaluation efforts were focused on outcomes (e.g., number of meetings), which did not capture the Team's work in designing, testing, and implementing strategies to create system change. Consequently, data collection was not targeted or responsive to the everyday work that was occurring. In contrast, this evaluation is tracking learning and the way these learnings influence and impact strategy.

Timeline

As its mission, EPE is working to change systems and end poverty in Edmonton. However, it is not clear what incremental system change toward this goal should look like. As a result, it is also more difficult to evaluate what short-term progress toward creating an inclusive economy looks like. In response to these challenges, the current evaluation plan focuses on lessons learned in developing and testing strategies and the process of creating an inclusive economy. The current evaluation report and resulting recommendations are written within this context.

Current Evaluation Framework

This is the first time (2022-2023) that we are applying strategic learning to evaluating the Inclusive Economy Game Changer. Strategic learning is a responsive strategy for evaluating complex initiatives working to create system change when the system and context are constantly evolving. According to Williams (2014), the purpose of strategic learning is to facilitate learning around efforts, influence, impacts, and outcomes.

Strategic learning is a tool for integrating data-driven strategy and ongoing evaluation practices into an initiative.

Evaluation for strategic learning is the collecting of information through a range of approaches to guide decision-making about strategy (Coffman & Beer, 2011). Efforts to create system change are non-linear. As a result, this evaluation process was iterative, involving periodic revisions to the evaluation plan, including design, methods, and data collection (Preskill et al., 2019). The specific objectives, indicators, and results for this evaluation are detailed in Appendix A: Evaluation Framework.

Methodology

Community-Based Participatory Evaluation

We employed a community-based participatory approach to guide this evaluation. The Inclusive Economy Team was actively engaged in evaluation planning, including providing feedback on evaluation approaches, iterations of the evaluation plan, interview questions, and participant lists. They were also involved in developing evaluation questions and interpreting initial themes during analysis.

Outcome Harvesting

In complex systems change processes, it is difficult to capture the markers of progress being made given that they can be slow-moving and often intangible. Outcome harvesting is a helpful approach for monitoring these markers, as well as the effectiveness and results of a given program or process being evaluated. Measuring outcomes, as opposed to impacts, focuses on measuring “a change in behaviour, relationships, actions, activities, policies, or practices of an individual, group, community, organization, or institution” (Wilson-Grau, 2018, p. 2). In addition, outcome harvesting is designed to be practical and to be used by practitioners such as grant makers, managers, and evaluators (p. 2).

In the outcome harvesting approach, evaluators are tasked to “identify, formulate, verify, analyze, and interpret ‘outcomes’ of interventions in contexts where relations of cause and effect were not fully understood when planning or implementing” (Wilson-Grau, 2018, p. 2). We have chosen to employ outcome harvesting as a method for measuring and monitoring in this evaluation given that it provides a more concrete frame for capturing and understanding the progress made by the Inclusive Economy Team. We offer the outcome harvesting results in the graph format (see Main Findings section).

Case Study

When determining which research approach would be most well suited to the context of this evaluation, we knew we needed an approach that would help us understand the specifics of the Inclusive Economy Team working at a systems level to solve poverty in Edmonton. The method of the case study presented itself as a good option, given that case studies “seek to explain some present circumstance (e.g., ask ‘how’ or ‘why’ some social phenomenon works)” (Yin, 2009, p. 4) and we wanted to capture the "why" and "how” of EPE’s work.

Additionally, the unique nature of EPE (as a group of professionals testing various solutions for poverty elimination) lends itself well to being evaluated as a case study because the case study approach offers room for customization that matches the context of the case. For the purposes of this evaluation, we understand EPE as a case study for poverty elimination work, specific to the context of Edmonton. Yet, this case also could act as an exemplary case, with the hope of other cities and municipalities drawing insight to implement poverty elimination work in their own contexts.

Qualitative Inquiry

Put simply, a qualitative approach to inquiry requires researchers to "attempt to interpret and make sense of the meaning people attach to their experiences or underlying a particular phenomenon" (Mayan, 2023, p. 3). Well-executed qualitative research is methodical, systematic, and scientific (p. 3). In this evaluation, implementing qualitative inquiry and methods allowed us to collect and understand the learnings and challenges of the Inclusive Economy Team. The conversations, interviews, meeting minutes and notes, and other written or spoken forms of information in this project are all forms of qualitative data, which were then further analyzed using qualitative content analysis (Mayan, 2023).

Evaluation Approaches

We used multiple evaluation approaches to evaluate the results of system change efforts in the Inclusive Economy Game Changer: utilization-focused evaluation, developmental evaluation, advocacy evaluation, and network evaluation.

- Utilization-focused evaluation centres on the usefulness of the evaluation results by the primary intended users. Utilization-focused evaluation actively involves the knowledge users in all phases of the evaluation (Quinn Patton, 2012). The Inclusive Economy Team was actively involved in evaluation planning, and the evaluation plan was modified multiple times to ensure the learnings determined through the evaluation would be useful to the Team.
- Developmental evaluation focuses on providing regular and ongoing feedback on an initiative. As intended outcomes change, so do methods of measurement (Quinn Patton, 2012). Through this evaluation approach, we captured emerging learnings and monitored patterns of system change.
- Through advocacy evaluation, we monitored and learned about strategy, efforts, and results related to advocacy. Instead of evaluating the advocates, this evaluation approach focuses on evaluating the results of the advocacy, including

relationship building, influence in the policy space, and strategic decision-making (Teles & Schmitt, 2011).

- Similarly, network evaluation focuses on assessing the Inclusive Economy Team's reputation and influence in the policy space and the value the Team generated for other organizations. The network of the Inclusive Economy Team includes representatives of businesses, industry, workforce development/employment support organizations, trades associations, government, and social enterprises. The purpose of the network is to share information, provide mutual support, and advocate for inclusive economic policies.

Methods & Analysis

We collected data for this evaluation from May 2022 to June 2022. In addition to the strategic priorities, the concept of strategic learning helped us structure the methods of this evaluation. The methods we used are summarized in this section. To find detailed descriptions, see Appendix B.

Strategic Learning

Strategic learning, the foundational concept for this evaluation approach, involves the (1) "systematic use of data for continuous improvement and the collective interpretation for new information", and (2) "applying the collective interpretation of information to strategy" (Lynn, 2012, p. 2). Strategic learning emphasizes the application of learning, making this approach reflective, pragmatic, and well-suited to the experimental nature of the Inclusive Economy Team's work.

Using strategic learning to structure this evaluation, we chose a couple key methods that would allow us to best collect data from the Inclusive Economy Team (and EPE's network, when necessary). First, we asked the Inclusive Economy Team to either record their activities and learnings in strategic learning briefs (in a Google Form) and/ or participate in strategic learning interviews with Team staff and CUP research coordinators (depending on each member of the Team's personal preference). Within the evaluation period, we received 52 strategic learning briefs, interviewed one Team member 8 times, and interviewed another team member 4 times. We also facilitated monthly strategic learning meetings (7 total, 1.5 hours per session) with as many of the Inclusive Economy Team as possible. These meetings were an extension of the reflection done in strategic learning debriefs and interviews.

Early in the evaluation period, we also used emergent learning tables, which are designed to help Teams come together around a framing question and share what they have learned) (Fourth Quadrant Partners, 2020). Near the end of the evaluation period, we facilitated two triple loop learning sessions to delve deeper into the Inclusive Economy Team's personal and group learning (see further detail in Appendix B). During the entirety of our 2022-2023 evaluation, we also used participant observation (CUP researchers participating and/or observing Inclusive Economy events and meetings), network interviews (to ask key questions about inclusive economy to EPE's broader network), and document review.

For this evaluation plan, our data analysis involved an in-depth review of all relevant Inclusive Economy documents (e.g., meeting notes, evaluation plans, staff work plans, interviews with EPE staff and with their broader network). All these data were brought into conversation with each other in order to analyze the impact and influence of the Inclusive Economy Team on inclusive economy work in Edmonton. A full description of each method is available in Appendix B: Description of Methods.

Main Findings - Key Strategic Successes

Strategic Priority 1: To build networks to share information, provide mutual support, & advocate for inclusive economy policies

> "We didn't have any connections to the community or potential service providers who could identify these candidates for work readiness. So our project would actually not have been a success without the intervention of EndPovertyEdmonton." (Construction Association)

One of the Inclusive Economy Team's strategic priorities for this evaluation year was to build networks to share information, provide mutual support, and advocate for inclusive economy policies. Working to connect widely with players interested in (and potentially essential to) building an inclusive economy, EPE's Inclusive Economy Team has networked and/or partnered with many groups and organizations: community agencies (e.g., Alberta Living Wage Network), non-profit organizations (e.g., Vibrant Communities Calgary, Explore Edmonton, Prospect Human Services, Bissell Centre, Action for Healthy Communities), businesses (e.g., A&H Steel, Delnor, RAM Elevators & Lifts, Buy Social Canada), associations (e.g., Alberta Construction Association, AKSIS - Edmonton's Indigenous Business & Professional Association, Edmonton Construction Association), educational institutions (e.g., University of Alberta, Norquest College), and municipal leaders and branches at the City of Edmonton. As the Inclusive Economy Team has connected and continues to connect with these members of their network, some have become actionable partners, undertaking their own efforts, in the inclusive economy space: namely, Alberta Living Wage Network, Vibrant Communities Calgary, Explore Edmonton, AKSIS- Edmonton's Indigenous Business & Professional Association, Edmonton Construction Association, Buy Social Canada, and Action for Healthy Communities. A&H Steel and Delnor are two key partners that the Inclusive Economy Team collaborated with and supported on specific initiatives.

Becoming Established as a Resource

Many members of the Inclusive Economy city- and province-wide network expressed that the Inclusive Economy Team is influential. They stated that they felt they could reach out to the Inclusive Economy for help overcoming an obstacle, for information, and in particular, to access the Team's existing connections with industry, government, and nonprofits. Members of the Inclusive Economy Team's network also shared how the Team opened their minds to inclusive economic possibilities and feasibility in Edmonton,

helped network members to identify demographics to target for workforce development (such as newcomer communities), and amplified the work already being done in Edmonton to build an inclusive economy. These positive influences indicate that the Inclusive Economy Team is contributing constructively to inclusive economy work in Edmonton.

"Keeping a Pulse" on the Inclusive Economy Space in Edmonton

This evaluation year, the Inclusive Economy Team focused on keeping track of "who's doing what" in the inclusive economy space in order to make more effective connections between players. With a continuously updated list of groups and organizations working on issues related to inclusive economy the Inclusive Economy Team has been more capable of not just recognizing gaps in the system, by reaching out to the right players and/or partnerships to help fill them. In particular, the Team connected Explore Edmonton with Buy Social Canada's consultant services, catalyzing a successful relationship. Additionally, the Inclusive Economy Team has convened with the Alberta Construction Association to help them launch their trade pathways program and with the Alberta Living Wage Network to further collaborate on advocating for a living wage policy in a workplace.

Contribution to Systems Change

In the 2022-2023 evaluation year, the Inclusive Economy Team contributed to systems change by:

- Creating a network of organizations interested in building an inclusive economy in Edmonton
- Becoming influential and trusted by this network
- Assisting network organizations to overcome obstacles and sharing their connections with industry, government, and non-profits (A&H Steel, Delnor, Explore Edmonton)
- Identifying demographics to target for workforce development (such as newcomer communities)
- Identifying gaps in the system and reaching out the right players/partnerships to fill them (Alberta Construction Association and Pathways; Explore Edmonton and Buy Social Canada)

Strategic Priority 2: To advocate for the adoption & implementation of inclusive economic approaches and plans within Edmonton's economic development sector

> "I think what they're doing … in Edmonton, is really important. And all of Alberta in time will benefit." (Vibrant Communities Calgary)

In the 2022-2023 evaluation year, the Team explored how and where they could best advocate for inclusive economic practices in Edmonton. This involved determining appropriate strategies for advocating to the City, the Alberta government, and the federal government, as well as to industry and the non-profit sector.

Timing Policy Asks

As EPE's work focused more on advocacy during this evaluation year, the Inclusive Economy Team was thrust into trying to effectively influence provincial electoral platforms. Through consulting with a policy advocacy group and meeting with government officials such as provincial Assistant Deputy Ministers, the Inclusive Economy Team attempted to insert policy "asks" related to building an inclusive economy (specifically, around employment) into provincial platforms at the "right" time. Additionally, the Team had planned a trip to Ottawa in Fall 2023 to advocate the federal government for community employment benefits (CEB) and other inclusive economic solutions, but the trip was postponed until May 2024.

Being a "Fourth Space"

Being able to operate as a "fourth space" (connected to but independent from industry, government, and other non-profits) has allowed EPE to occupy a unique position of using their independence as an organization to advocate for pressing, interlocking issues. In 2022-2023, the Inclusive Economy Team solidified and put this "fourth space" identity to use. Specifically, they brought together priorities of the Inclusive Economy and Indigenization Game Changers to advocate for economic reconciliation. Additionally, the Team was able to use the independence of their "fourth space" identity to meet with politicians across parties and political leanings: for example, they met with provincial ADMs and the Alberta Official Opposition regarding employment and training, as well as the City of Edmonton's mayoral staff on inclusive economy more broadly. They also met with advocacy experts and politicians to learn about the barriers and pathways towards advocating for community employment benefits (CEB) and social procurement policy. These efforts continued well into 2023 with a wide variety of stakeholders on projects regarding CEB and social procurement policy, such as: the Edmonton Chamber of

Commerce, Marigold Infrastructure Partners, Stewart Group, the City of Edmonton's Integrated Economic Services, Explore Edmonton, AKSIS (Edmonton's Indigenous Business & Professional Association), Applied Colour, and Hire Good. One key "pay-off" of this work was having wide support backing the Inclusive Economy Team as they asked MP Randy Boissonnault, Federal Minister of Workforce Development and Official Languages to support advocacy for a community employment benefit (CEB) initiative. While other non-profits are beholden to certain procedures and regulations surrounding policy advocacy, EPE has freedom, capacity, influence, and clout to advocate in these meetings for policy change on inclusive economic issues.

Adoption of a Social Procurement Strategy by the City of Edmonton and Supporting its Economic Plan

The Team connected with the City of Edmonton this evaluation year by requesting advocacy-specific meetings, including meetings with the Office of the Mayor's staff. For instance, the Team met with the City's Economic Investment Services to discuss supporting the City's Economic Plan. They also connected with the City's procurement staff and pushed a municipal policy "ask" that would require the City to incorporate community employment benefits in construction bids. This work deepened the Inclusive Economy Team's knowledge of areas of opportunity and need within the City. One notable success was the Team's advocacy for a social procurement strategy, which guided the City's adoption of its Social Purchasing Strategy.

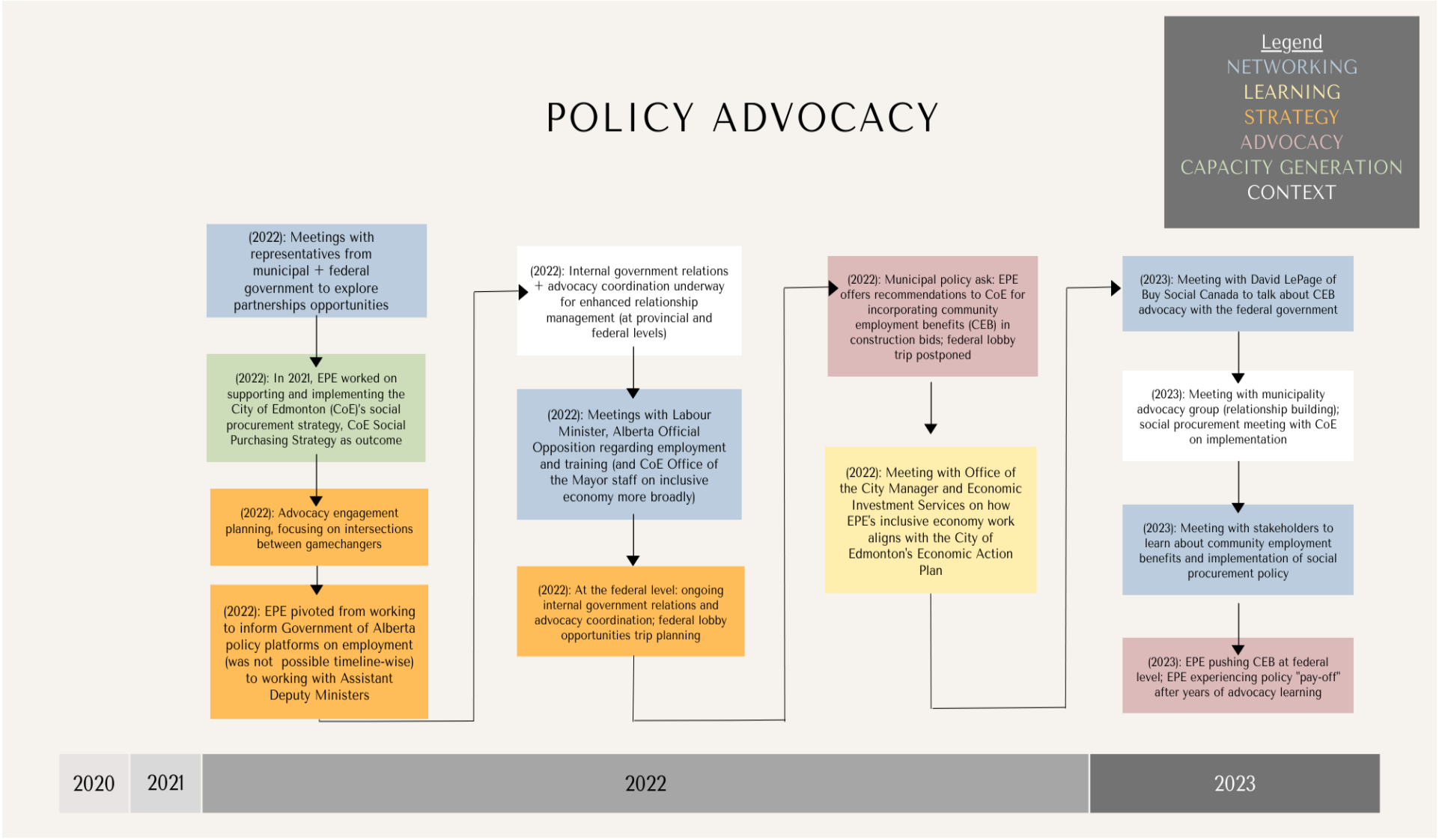
Advocating for Community Employment Benefits (CEB) Requirements at the Federal Level

In 2022, the Inclusive Economy Team pivoted from working to inform Government of Alberta policy platforms on employment to working at the federal level with Assistant Deputy Ministers in order to meaningfully advocate for community employment benefits (CEB). In an attempt to effectively advocate for stronger CEB requirements, the Inclusive Economy Team met with David LePage, a social procurement advocate from Buy Social Canada, to collaborate and learn. They also met with Global Public Affairs to learn how to best advocate for CEB at the federal level. These efforts have improved the Inclusive Economy Team's government relations, and advocacy coordination is now well underway at provincial and federal levels.

Contribution to Systems Change

In the 2022-2023 evaluation year, the Inclusive Economy Team, as a player in the "fourth space," contributed to systems change by:

- Advocating for policies that increase opportunities for building an inclusive economy in Edmonton such as the City of Edmonton's internal social procurement policy and the Government of Canada's community employment benefits (CEB) requirements.
- Appropriately using their flexibility, influence, and clout as an organization to advocate for solutions to pressing, interlocking issues such as those underlying economic reconciliation
- Meeting with politicians of various parties and political leanings
- Supporting the City of Edmonton's Economic Plan by connecting with the City's procurement staff and suggesting that the City of Edmonton incorporate community employment benefits (CEB) in construction bids
- Guiding the City of Edmonton's adoption of a Social Purchasing Strategy
- Pivoting from working to inform Government of Alberta policy platforms on employment to working at the federal level with Assistant Deputy Ministers in advocate for community employment benefits (CEB)
- Learning from experts about how to best advocate for community employment benefits (CEB) and social procurement policies, which has led to advocacy coordination at the provincial and federal levels.


POLICY ADVOCACY
Legend
NETWORKING
LEARNING
STRATEGY
ADVOCACY
CAPACITY GENERATION
CONTEXT
(2022): Meetings with representatives from municipal + federal government to explore partnerships opportunities
(2022): In 2021, EPE worked on supporting and implementing the City of Edmonton (CoE)'s social procurement strategy, CoE Social Purchasing Strategy as outcome
(2022): Advocacy engagement planning, focusing on intersections between gamechangers
(2022): EPE pivoted from working to inform Government of Alberta policy platforms on employment (was not possible timeline-wise) to working with Assistant Deputy Ministers
(2022): Internal government relations + advocacy coordination underway for enhanced relationship management (at provincial and federal levels)
(2022): Meetings with Labour Minister, Alberta Official Opposition regarding employment and training (and CoE Office of the Mayor staff on inclusive economy more broadly)
(2022): At the federal level: ongoing internal government relations and advocacy coordination; federal lobby opportunities trip planning
(2022): Municipal policy ask: EPE offers recommendations to CoE for incorporating community employment benefits (CEB) in construction bids; federal lobby trip postponed
(2022): Meeting with Office of the City Manager and Economic Investment Services on how EPE's inclusive economy work aligns with the City of Edmonton's Economic Action Plan
(2023): Meeting with David LePage of Buy Social Canada to talk about CEB advocacy with the federal government
(2023): Meeting with municipality advocacy group (relationship building); social procurement meeting with CoE on implementation
(2023): Meeting with stakeholders to learn about community employment benefits and implementation of social procurement policy
(2023): EPE pushing CEB at federal level; EPE experiencing policy "pay-off" after years of advocacy learning
2020
2021
2022
2023

Strategic Priority 3: To advocate for the adoption & implementation of economic reconciliation approaches

As a crucial component of this evaluation, economic reconciliation was tracked using strengths-based indicators and seven-generation thinking (i.e., making decisions based on how they will impact people seven generations ahead of us). Economic reconciliation was and continues to be pursued by the Inclusive Economy Team both internally and externally.

Furthering Reconciliation Learnings with EPE Staff

Internally, non-Indigenous staff of EPE have been following reconciliation learnings led by Indigenous staff. One key reason for this is to educate about Indigenous ways of being and knowing so the staff (including the Inclusive Economy Team) are more aware and knowledgeable as they forward economic reconciliation practices in their work. One staff member discussed how the teachings from the Indigenization Team have shaped their strategic thinking.

> "I think the way we think about [ending poverty] and the current systems, we can see that they are clearly not working. I've been really interested in learning the teachings because I'm trying to think about things like seven generations thinking. How do we have an impact on the next seven generations? And how does this fit into how we structure our organization and our work? Indigenization is a way to inform our future systems." (Staff Interview)

Evaluation of the Inclusive Economy Team's learning through interviews and reflections indicate that economic reconciliation has been further embedded into the Inclusive Economy Team's perspectives. To one staff member, their knowledge of how to work as an ally to Indigenous peoples and implement reconciliation has changed how they work.

> "We're trying to work as a Team. Sometimes, I think people's heads like, oh, that's an indigenous activity, so [Indigenous Lead] is like, we're gonna go to all these meetings together, not one of us, because … Indigenous, and settler has to be done together. And so we have to go together and talk about it together. And it means, you know, we may look at it differently." (Staff Interview)

From the Team's learning on Indigenous history, Indigenous ways of knowing and being, and the work of reconciliation, the Inclusive Economy Team is better able to advocate externally for economic reconciliation practices to be adopted in Edmonton.

Outward-Facing Economic Reconciliation Efforts

External economic reconciliation is still in the foundation-setting phase. In 2022, the Inclusive Economy Team was able to work with partners to advocate for the adoption of economic reconciliation approaches within Edmonton's economic development sector. Specifically, these partners form the Economic Reconciliation Stewardship Group: the Edmonton Chamber of Commerce, AICCC (Alberta Indigenous Career Construction Centre), Rotary, Explore Edmonton, City of Edmonton, United Way, REACH, Yellowhead Tribal Council, CCAB (Canadian Council for Aboriginal Business), and AKSIS.

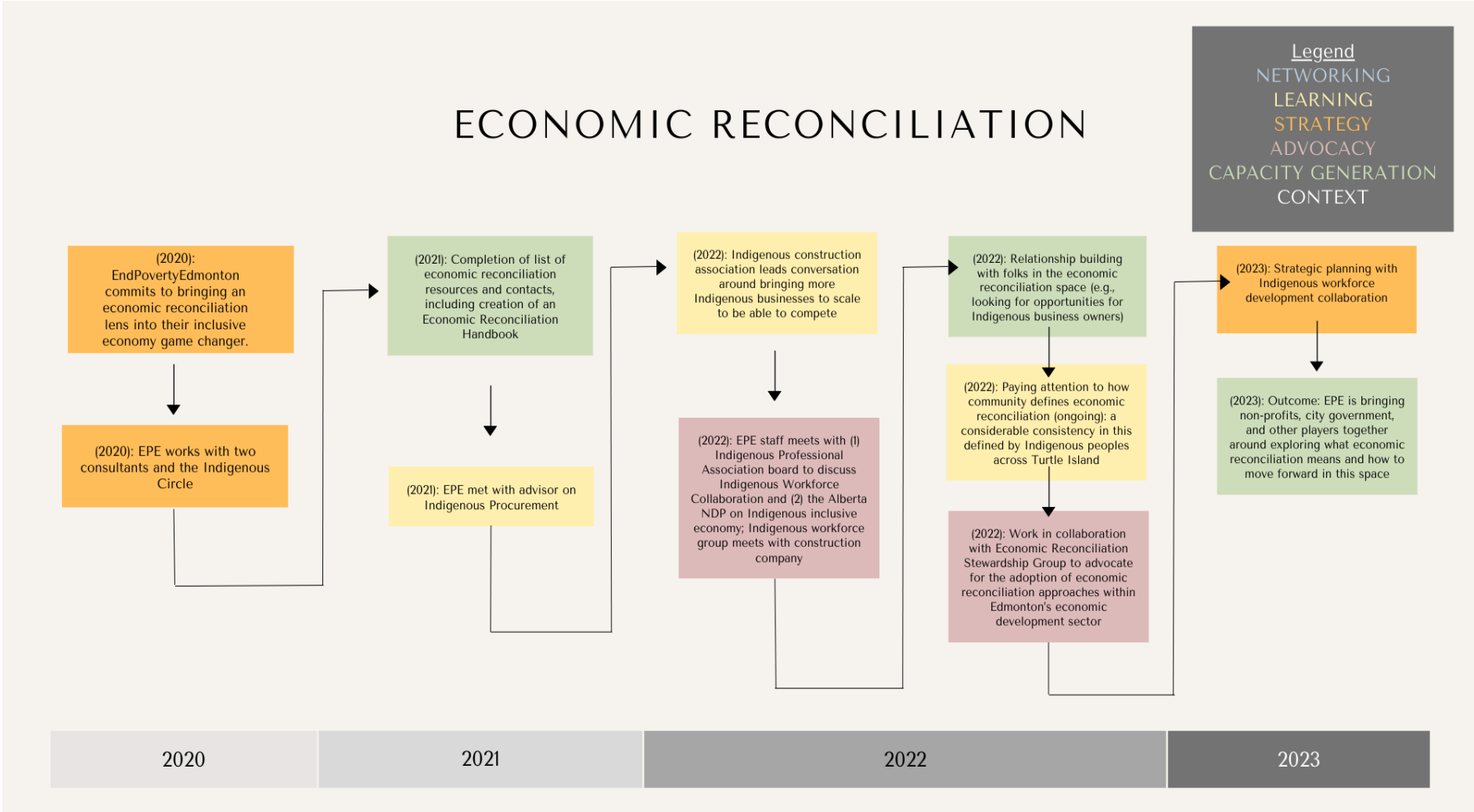
In 2022, the Inclusive Economy Team met with two strong players for forwarding economic reconciliation in Edmonton: the Indigenous Professional Association board and the Alberta NDP. The meeting with the Indigenous Professional Association board was to discuss Indigenous workforce collaboration efforts and organizing, and the meeting with the Alberta NDP was to discuss the necessity of incorporating Indigenous business and social procurement when building an inclusive economy. These efforts advance the Inclusive Economy Team's relationship-building work in the economic reconciliation space and set the stage of tangible outcomes such as connecting Indigenous workforce and business owners with opportunities in Edmonton.

Members of the Inclusive Economy and Indigenization Teams also spent time in 2022 developing relationships and engaging with the urban Indigenous community in Edmonton on how to define economic reconciliation. These staff members engaged with approximately 15 leaders of national and local Indigenous and non-Indigenous organizations to learn about economic reconciliation, what economic reconciliation looks like in other parts of Canada, and opportunities for collaboration. In summer 2022, an Economic Reconciliation Circle (consisting of Indigenous people and allies) was convened to continue working together to advance efforts in Edmonton.

Contribution to Systems Change

In the 2022-2023 evaluation year, the Inclusive Economy Team, led by one of the Directors of Indigenization, contributed to systems change by:

- Ensuring their own Team had a foundational understanding of Indigenous ways of knowing and being so that economic reconciliation tactics are grounded in awareness of and acting with integrity towards Indigenous communities.
- Determining a definition of economic reconciliation by collaborating with 15 local and national Indigenous organizations as a needed first step in making economic reconciliation actionable and adoptable in Edmonton.
- Establishing an Economic Reconciliation Stewardship Group with the aim of creating tangible outcomes such as connecting Indigenous workforce and business owners with opportunities in Edmonton.
- Bringing together non-profits, city government, and other players to explore what economic reconciliation requires and how to move it forward.


ECONOMIC RECONCILIATION
Legend
NETWORKING
LEARNING
STRATEGY
ADVOCACY
CAPACITY GENERATION
CONTEXT
(2020): EndPovertyEdmonton commits to bringing an economic reconciliation lens into their inclusive economy game changer.
(2020): EPE works with two consultants and the Indigenous Circle
(2021): Completion of list of economic reconciliation resources and contacts, including creation of an Economic Reconciliation Handbook
(2021): EPE met with advisor on Indigenous Procurement
(2022): Indigenous construction association leads conversation around bringing more Indigenous businesses to scale to be able to compete
(2022): EPE staff meets with (1) Indigenous Professional Association board to discuss Indigenous Workforce Collaboration and (2) the Alberta NDP on Indigenous inclusive economy; Indigenous workforce group meets with construction company
(2022): Relationship building with folks in the economic reconciliation space (e.g., looking for opportunities for Indigenous business owners)
(2022): Paying attention to how community defines economic reconciliation (ongoing): a considerable consistency in this defined by Indigenous peoples across Turtle Island
(2022): Work in collaboration with Economic Reconciliation Stewardship Group to advocate for the adoption of economic reconciliation approaches within Edmonton's economic development sector
(2023): Strategic planning with Indigenous workforce development collaboration
(2023): Outcome: EPE is bringing non-profits, city government, and other players together around exploring what economic reconciliation means and how to move forward in this space
2020
2021
2022
2023

Strategic Priority 4: To identify the economic systems & policies we want to change, develop a process/plan towards this change, & test options for inclusive economic approaches

During this evaluation year, the Inclusive Economy Team identified economic policies, approaches, and strategies appropriate to the Edmonton context and tested possible options via two experimental initiatives in the construction industry. The first initiative was an apprenticeship cohort focused on acclimating newcomers to the workforce in a healthy way. The second initiative was to determine whether liaison support between employers and workforce development agencies would increase how many workforce development agency clients were hired and retained. As a result of these initiatives, economic systems and policies requiring change have been identified and potential solutions are being considered.

Apprenticeship Cohort Initiative Tested with Local Construction Business A&H Steel

The Inclusive Economy Team tested an apprenticeship cohort initiative with newcomers to Edmonton as one micro-experiment for systems change. This involved shifting how hiring and training occurs within one business, with learnings for this shift aimed to be applied in other businesses and/or in broader industry contexts. The cohort initiative undertaken with A&H Steel, a local construction company, and supported also by Action for Healthy Communities, helps to alleviate the barrier of labour shortage in their industry by training cohorts of newcomers to Canada. This cohort model allows the newcomer trainees to feel supported by their peers through sharing an experience and being able to work through it together (often, speaking in a language other than English). An individual employed in the industry says the following of this initiative:

> “It's moving forward, it's still the first time so you know, we've run into a couple of hiccups here and there that we're navigating. But that was the point of trying it out: what do we run into? So I would say that they [Inclusive Economy Team] are probably one of the first groups outside of the union to actually be fully actually engaged in solving the problem.” (Industry Employee)

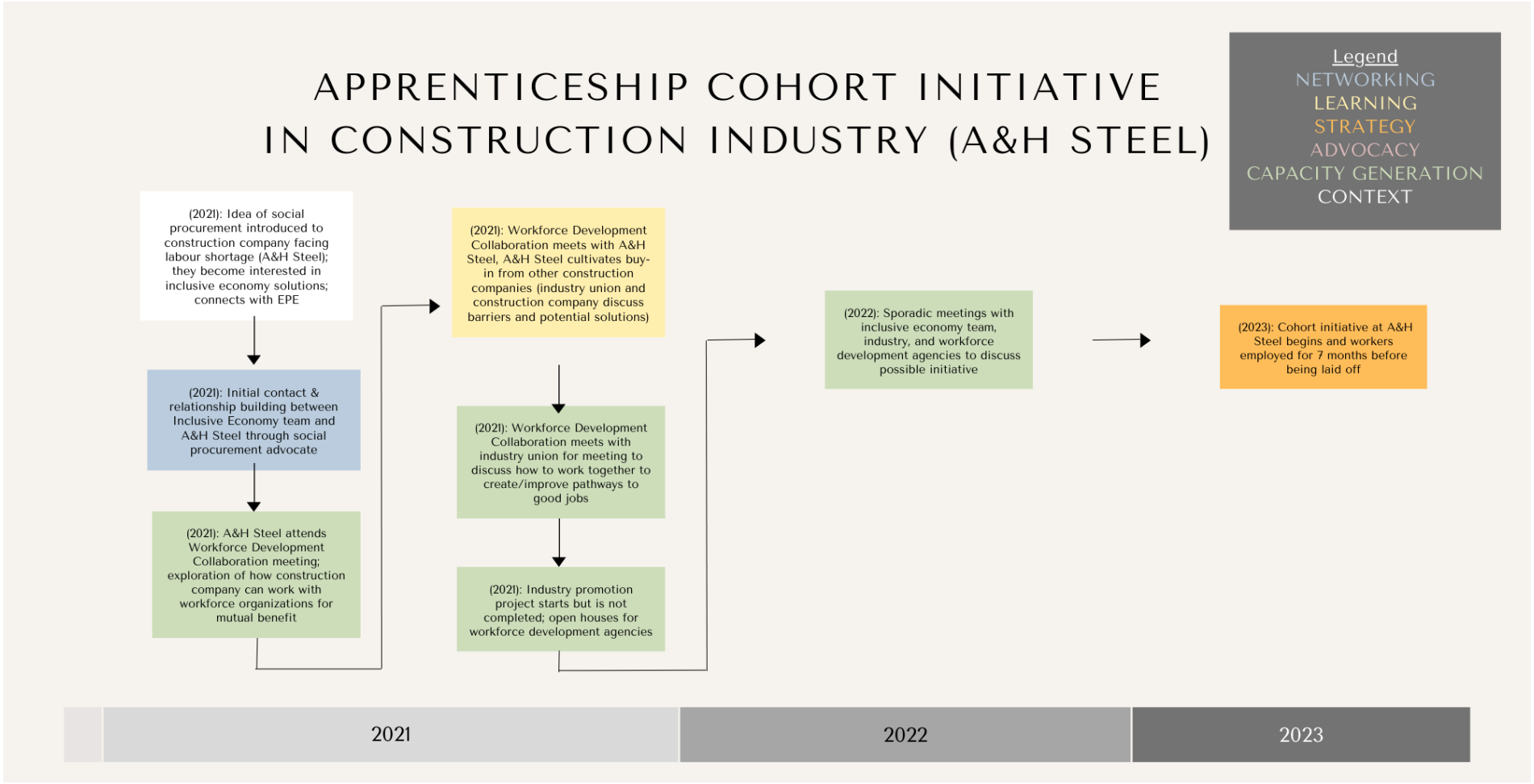
The initial contact in 2021 between the Inclusive Economy Team and A&H Steel was made through Buy Social Canada. The same year, A&H Steel then connected with the Workforce Development Collaboration (supported by the Inclusive Economy Team), met with the industry union to brainstorm pathways to good jobs (i.e., living wage, government protections, benefits), and hosted open houses for workforce development agencies to attend. The momentum in 2021 for this initiative slowed in 2022, but the

initiative regained considerable momentum in 2023. Workers were employed for 7 months before being laid off due to inconsistent work in the industry, which is especially challenging for newcomers as they had not yet had time to earn the money to see them through slow periods. This gap in the system is part of the challenges between newcomers and stable employment that the Inclusive Economy Team has worked on addressing through this initiative.

From the implementation of this initiative during 2022-2023, the Inclusive Economy Team knew that there must be significant motivation and buy-in from the construction company to carry out an alternative initiative like this as a solution for labour shortage. The Inclusive Economy Team and their partners learned about important systems challenges may impact future apprenticeship cohort initiatives, such as the following:

- An employment supports programs intermediary/one-stop shop for employers is unlikely to improve recruitment and hiring from equity-seeking groups
- Low initiative engagement with active workforce collaborative members points to a lack of time or capacity in utilizing a centralized job developer/connector role.

In addition, the Inclusive Economy Team clarified that there must be communication and preparation with new workers about the patterns of the work (e.g., regular periods of being laid off within work in the construction industry). In essence, an initiative like the apprenticeship cohort initiative, and the change it brings, does not carry itself through on its own. Instead, it must be carried through with consistent communication between a motivated business and a workforce development agency with capacity, in coordination with external support from an organization like EPE.


APPRENTICESHIP COHORT INITIATIVE
IN CONSTRUCTION INDUSTRY (A&H STEEL)
Legend
NETWORKING
LEARNING
STRATEGY
ADVOCACY
CAPACITY GENERATION
CONTEXT
(2021): Idea of social procurement introduced to construction company facing labour shortage (A&H Steel); they become interested in inclusive economy solutions; connects with EPE
(2021): Initial contact & relationship building between Inclusive Economy team and A&H Steel through social procurement advocate
(2021): A&H Steel attends Workforce Development Collaboration meeting; exploration of how construction company can work with workforce organizations for mutual benefit
(2021): Workforce Development Collaboration meets with A&H Steel, A&H Steel cultivates buy-in from other construction companies (industry union and construction company discuss barriers and potential solutions)
(2021): Workforce Development Collaboration meets with industry union for meeting to discuss how to work together to create/improve pathways to good jobs
(2021): Industry promotion project starts but is not completed; open houses for workforce development agencies
(2022): Sporadic meetings with inclusive economy team, industry, and workforce development agencies to discuss possible initiative
(2023): Cohort initiative at A&H Steel begins and workers employed for 7 months before being laid off
2021
2022
2023

Liaison Support Initiative for Marginalized Workers Tested in Partnership with Delnor

The Inclusive Economy Team tested another initiative this evaluation year in order to learn and engage with the newcomer community in Edmonton, which often experiences difficulty entering the workforce. With this liaison support initiative—in partnership with a few local businesses, but closely with local construction company Delnor—the Inclusive Economy Team was hoping to learn whether liaison support (i.e., acting as the convenor between an employer and a workforce development agency) helps to facilitate employment of newcomer clients. The Inclusive Economy Team pursued this convening work due to identified needs from marginalized populations of workers and from the Edmonton business community.

> "There's a lot of stuff that EndPovertyEdmonton points out, you know, different challenges, different things we need to think about that I never would have thought about. I probably would have just been trying to recruit newcomers, and then not knowing why it wasn't working." (Construction Company)

Additionally, another local business owner also interested in this initiative worked with the Inclusive Economy Team to explore bringing a similar initiative to their business. The following quote speaks to this engagement and indicates building momentum for liaison support possibilities:

> "EndPovertyEdmonton was working with [this non-profit] and their ask was, you know, 'we'd just like to bring a group of immigrants, I think, refugees and other new immigrants to your shop, to give them a tour, just you know, so they get an understanding of what's going on. And if nothing else, it's a good experience. And, you know, you guys might find a couple qualified employees that tumbled out of the exercise,' etc. And said, 'Sure, why not?' And I guess, because of the EndPovertyEdmonton connection, I was pretty open to this from a business standpoint, because we needed employees desperately and I knew what EPE was trying to accomplish. So I was pretty supportive of this. I think they originally had, I don't know, eight, nine or 10 signed up to come. We ended up with something like 16 [interested potential employees]." (Local Entrepreneur)

All in all, the liaison support initiative did not have the outcomes everyone had hoped for. Out of the 21 resumes Delnor received from 4 different workforce development agencies and nonprofits, only 2 individuals were interviewed and only 1 was offered a position but did not accept. Delnor confirmed that the individual was offered the job via email, but it is not clear that the candidate received the email offer, and they may have faced barriers

due to limited digital and English language skills. In the end, no individuals were employed. Delnor communicated that they were disappointed that they were not able to hire anyone via the initiative. The company acknowledged that the time and effort required to recruit and connect with candidates may not be within the capacity of their current HR system. This experience prompted both Delnor and the Inclusive Economy Team to reflect upon internal organization and how trades and labour are allocated internally.

Another outcome produced from this initiative was that Delnor, despite its disappointment, continues to be interested in connecting with high-potential candidates when business needs indicate there is room to hire. From the initiative as a whole, the Inclusive Economy Team took away the following learnings:

1. In the liaison support role, it was challenging to engage workforce development agencies given capacity restraints (e.g., staff with already-full portfolios, limited human resources capacity).
2. Also due to limited human resources capacity, the construction company could not provide feedback to the Team about how the initiative was going until it was over, so adaptations could not be made.
3. Acting as the liaison support between the construction industry and workforce development agencies did not yield meaningful outcomes in terms of the number of clients hired from workforce development agencies.
4. If an initiative is not working and adaptation is not possible, learn from the experience and end the relationship (for the time).

Contribution to Systems Change

During the 2022-2023 evaluation year, the Inclusive Economy Team contributed to systems change by:

- Testing two different initiatives (the apprenticeship cohort and the liaison support) that held promise for accessing good jobs for newcomer communities
    - Learning what is needed on the workforce development side (i.e., increased human resources capacity to connect and follow up with clients applying for jobs)
    - Learning that pursuing employment supports liaison work is not as fruitful as expected
- Preparing to apply this learning in future efforts

Strategic Priority 5: To engage in strategic learning about efforts in inclusive economy to ensure decision-making is evidence informed

The Inclusive Economy Team has participated in ongoing reflections on plans, progress, and challenges as a part of their strategic learning during the 2022-2023 year. Overall, this report reflects this strategic priority. As CUP and the Inclusive Economy Team, we engaged in strategic learning so that the Team's efforts built on what they had tested and learned. To reiterate some other sections of this report, the Inclusive Economy Team focused this evaluation year on: connecting employers and workforce development agencies, making connections to and for advocacy work, and strengthening trust and relationships with partners.

Connecting Employers and Workforce Development Agencies

In 2021, the Inclusive Economy Team began facilitating connections between employers and workforce development agencies to improve access to good jobs. During this time, we discovered barriers to making connections between workforce development agencies and employers, such as a general unawareness of the existence of workforce development agencies from the side of the employer and a lack of knowledge on how to effectively connect and form partnerships with employers on the side of workforce development agencies. Another barrier that the Inclusive Economy Team came to understand was the non-profit funding system itself and how it hinders collaboration between workforce development agencies and employers. In 2022, the Inclusive Economy Team focused particularly on learning more on how to overcome the obstacles presented by the funding system and other barriers to collaboration.

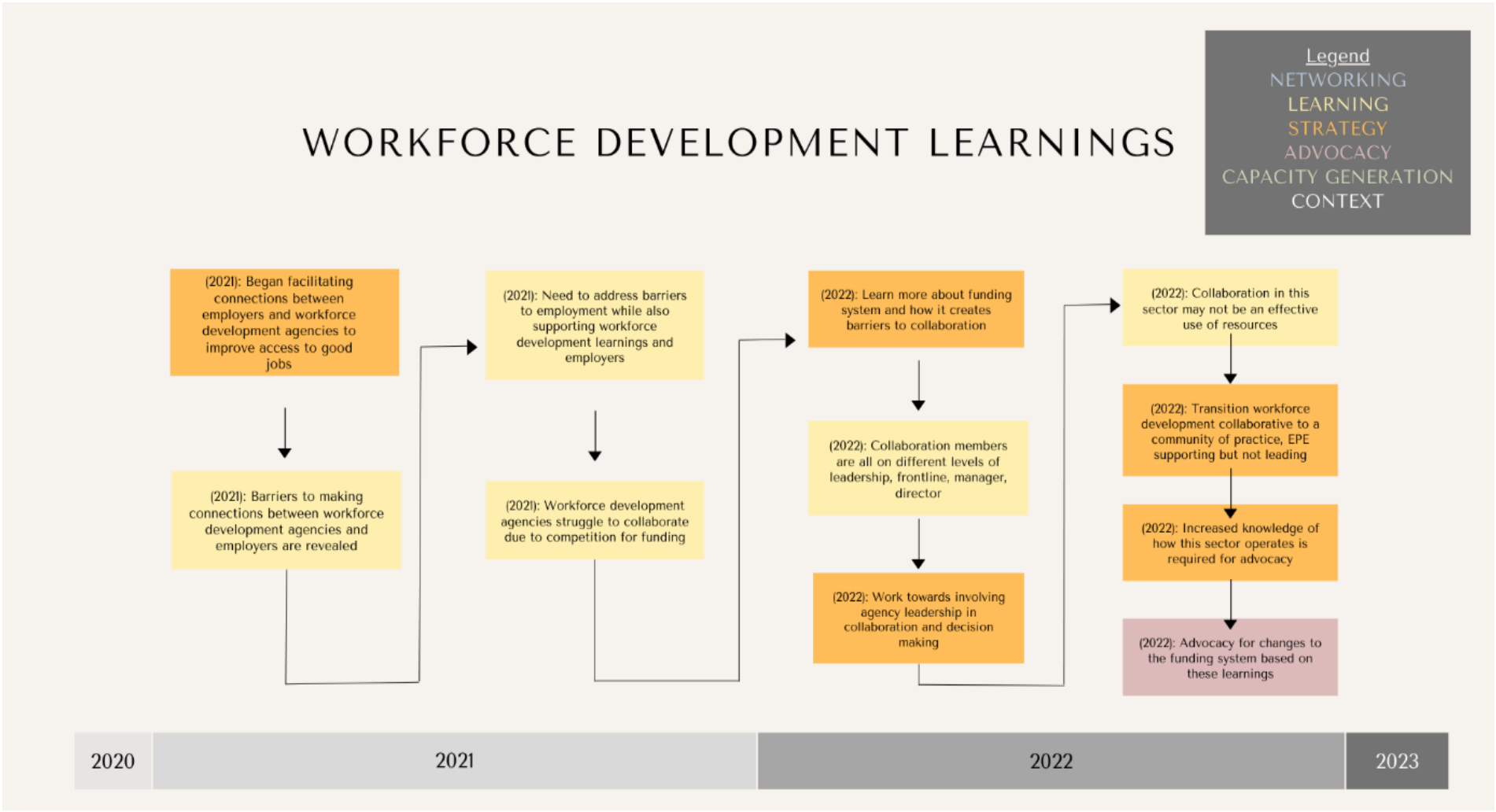
One key emergent learning this evaluation year was the Team's realization that collaboration between workforce development agencies and employers may not be an effective use of the Inclusive Economy Team's resources, given that it requires that Inclusive Economy Team members expend significant energy "holding" the collaboration together (rather than helping to catalyze and collaboration and then leave it to create its own self-sufficiency). As such, they transitioned the workforce development collaborative into a community of practice, with an Inclusive Economy team member supporting but not leading the group.

Making Connections to and for Advocacy Work

The Inclusive Economy Team also reflected on advocacy work being able to help them build strategy, being agile in the inclusive economy sector as a non-profit organization without traditional programming, and discussing the importance of collaboration across Game Changers. Gaining knowledge on how best to conduct policy advocacy (e.g.,

understanding timing and timelines regarding inserting policy asks into provincial candidates' platforms) allows for more clarity regarding the role that the Inclusive Economy Team can play in influencing policy makers. These learnings inform and can continue to inform strategic decisions for the Inclusive Economy Team regarding policy advocacy work (see Strategic Priority 2).

Regarding the Inclusive Economy Team's strategic learning, they further recognized this evaluation year that the Game Changer itself requires an innovative approach in how they, as the Inclusive Economy Team, begin projects. Through all of their learning, the Team has been able to shift strategy during the 2022-2023 evaluation year based on an intimate and nuanced understanding of how the inclusive economy and the current economic sector interact and operate.


WORKFORCE DEVELOPMENT LEARNINGS
Legend
NETWORKING
LEARNING
STRATEGY
ADVOCACY
CAPACITY GENERATION
CONTEXT
(2021): Began facilitating connections between employers and workforce development agencies to improve access to good jobs
(2021): Barriers to making connections between workforce development agencies and employers are revealed
(2021): Need to address barriers to employment while also supporting workforce development learnings and employers
(2021): Workforce development agencies struggle to collaborate due to competition for funding
(2022): Learn more about funding system and how it creates barriers to collaboration
(2022): Collaboration members are all on different levels of leadership, frontline, manager, director
(2022): Work towards involving agency leadership in collaboration and decision making
(2022): Collaboration in this sector may not be an effective use of resources
(2022): Transition workforce development collaborative to a community of practice, EPE supporting but not leading
(2022): Increased knowledge of how this sector operates is required for advocacy
(2022): Advocacy for changes to the funding system based on these learnings
2020
2021
2022
2023

Strengthening Trust and Relationship with Partners

The Inclusive Economy Team also focused energy on strengthening external relationships with non-profits, businesses, and government officials. Some of these partners included Delnor, A&H Steel, Explore Edmonton, AB Seed, Buy Social Canada, and governmental officials such as Aaron Paquette (city councillor) and Randy Boissonnault (MP). One learning from working on these external relationships was that building trust and legitimacy operates in both directions: it is crucial that partnering organizations and groups trust the Inclusive Economy Team; likewise, the Inclusive Economy Team relies on trusting their partners to do their work in a helpful manner, especially on politically charged issues. As one Inclusive Economy Team member commented:

> “It's a lot of trying to figure out what the opportunities are, are they genuine, do we have good relationships? Like, I think, if any emotional pieces are coming up, it's more like, can we trust the people that we're working with externally? Are they gonna show up in a good way?” (Staff Interview)

One strong relationship that continued to be forged over this evaluation year was between the Inclusive Economy Team and A&H Steel With the apprenticeship cohort initiative, the Inclusive Economy Team and A&H Steel worked together to track initial contacts, interviews, offer and start work dates for cohort participants. A&H Steel agreed to provide feedback on the quality of candidates and the interview process, as well as overall feedback about workers hired through this initiative. This type of active partnership, initiated by the Inclusive Economy Team, exemplifies the relationship and trust-building efforts that the Team enacted this evaluation year.

Contribution to Systems Change

During the 2022-2023 evaluation year, the Inclusive Economy Team contributed to systems change by:

- Building and adapting their strategy for workforce development based on ongoing learning (e.g., discovering and determining solutions to obstacles to collaboration between workforce development agencies and employers)
- Removing themselves from leading the workforce development collaborative to supporting it to be self-sustainable so they could pursue other projects
- Clarifying the role that the Inclusive Economy Team can play in influencing decision makers with relevant policy portfolios. See Strategic Priority #2 for more progress on advocacy.
- Strengthening relationships and building trust and legitimacy that flows in both directions. See Strategic Priority #1 for more progress on building trust and legitimacy

Strategic Priority 6: To share learning with key players in the workforce development and social procurement space to raise awareness about their work in building an inclusive economy

In this evaluation year, the Inclusive Economy Team presented to and attended a wide variety of community gatherings and meetings to forward education and awareness on building an inclusive economy in Edmonton. The events and presentations attended or hosted by the Inclusive Economy Team have continued to build the inclusive economy network.

Raising Awareness through Key Partnerships and Events

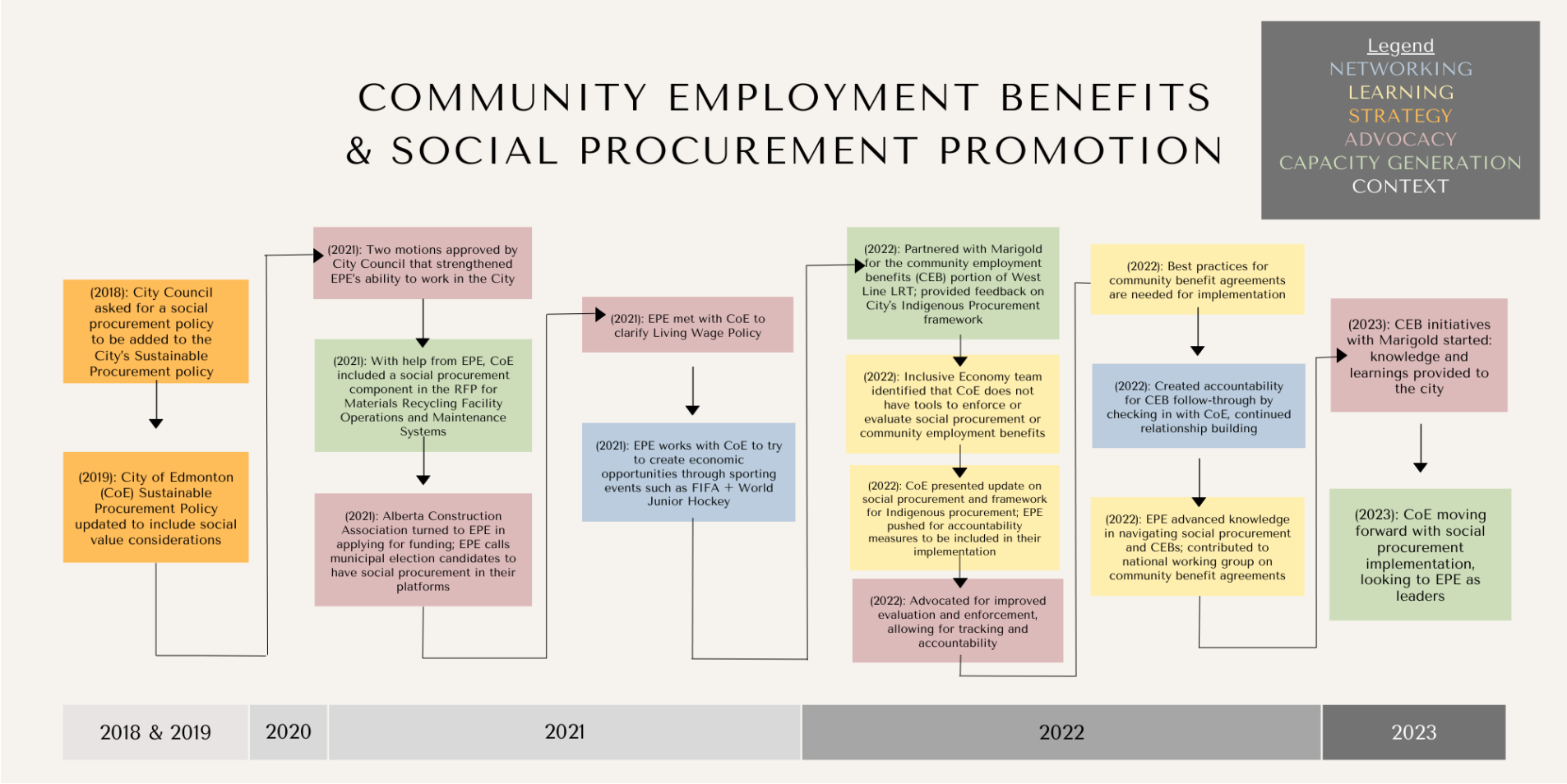
One of the Team's goals that was achieved was building partnerships with key players (e.g., Buy Social Canada, AB Seed, the MacEwan University Social Innovation Institute, Alberta Living Wage Network, Explore Edmonton, AKSIS-Edmonton's Indigenous Business & Professional Association, Edmonton Construction Association, Action for Healthy Communities) to raise awareness together about inclusive economy practices. One event in particular exemplifies the benefits and success of this work: the "Buying and Selling Social with Impact" workshop organized in collaboration with the MacEwan University Social Innovation Institute, Buy Social Canada, and AB Seed. Local non-profit, social enterprise, and business groups attended this workshop to learn about social

procurement possibilities and feasibility, and become more educated and connected with other organizations and/or companies interested in social procurement.

Another partnership that the Inclusive Economy Team continued to build this evaluation year was with the City of Edmonton itself, as a government committed to eliminating poverty by building an inclusive economy. Working with the Alberta Living Wage Network, the Inclusive Economy Team met with the City to clarify and determine its interest in supporting a living wage policy. These talks are in preliminary stages. Additionally, the Team worked with the City to locate economic opportunities and create proposals for major sporting events, like FIFA and World Junior Hockey. The Alberta Construction Association also turned to the Inclusive Economy Team for assistance in applying for funding and information on social procurement.

Promoting Community Employment Benefits (CEB) Accountability Measures

The Inclusive Economy Team also forged a partnership in 2022 to start building awareness around the need for community employment benefits (CEB). The Team worked with global construction conglomerate Marigold Infrastructure Partners—the company responsible for building the Valley Line West LRT—to advocate for CEB agreements to be made between Marigold Infrastructure Partners and the City of Edmonton. Promoting community employment benefits was one part of the process, but the Inclusive Economy Team soon discovered the critical need for accountability on CEB implementation. In other words, community employment benefits could be written into proposals but no follow up occurred to ensure that the CEBs were honoured. As a result, after the City presented updates on its social procurement and Indigenous procurement strategies in 2022, the Inclusive Economy Team advocated for accountability measures like improved evaluation and enforcement around community employment benefit projects. The CEB initiative with Marigold Infrastructure Partners had provided the Inclusive Economy Team with timely and critical knowledge around CEB and the need for accountability measures.


COMMUNITY EMPLOYMENT BENEFITS
& SOCIAL PROCUREMENT PROMOTION
Legend
NETWORKING
LEARNING
STRATEGY
ADVOCACY
CAPACITY GENERATION
CONTEXT
(2018): City Council asked for a social procurement policy to be added to the City's Sustainable Procurement policy
(2019): City of Edmonton (CoE) Sustainable Procurement Policy updated to include social value considerations
(2021): Two motions approved by City Council that strengthened EPE's ability to work in the City
(2021): With help from EPE, CoE included a social procurement component in the RFP for Materials Recycling Facility Operations and Maintenance Systems
(2021): Alberta Construction Association turned to EPE in applying for funding; EPE calls municipal election candidates to have social procurement in their platforms
(2021): EPE met with CoE to clarify Living Wage Policy
(2021): EPE works with CoE to try to create economic opportunities through sporting events such as FIFA + World Junior Hockey
(2022): Partnered with Marigold for the community employment benefits (CEB) portion of West Line LRT; provided feedback on City's Indigenous Procurement framework
(2022): Inclusive Economy team identified that CoE does not have tools to enforce or evaluate social procurement or community employment benefits
(2022): CoE presented update on social procurement and framework for Indigenous procurement; EPE pushed for accountability measures to be included in their implementation
(2022): Advocated for improved evaluation and enforcement, allowing for tracking and accountability
(2022): Best practices for community benefit agreements are needed for implementation
(2022): Created accountability for CEB follow-through by checking in with CoE, continued relationship building
(2022): EPE advanced knowledge in navigating social procurement and CEBs; contributed to national working group on community benefit agreements
(2023): CEB initiatives with Marigold started: knowledge and learnings provided to the city
(2023): CoE moving forward with social procurement implementation, looking to EPE as leaders
2018 & 2019
2020
2021
2022
2023

Sharing Advocacy Learnings Locally and Nationally

In 2022-2023, the Inclusive Economy Team shared their advocacy learnings both at the local and national level. This work builds on a foundation of advocacy for social procurement policy established in prior years. In 2019, the City of Edmonton's Sustainable Procurement Policy was updated to include social value considerations, and the Inclusive Economy Team saw an opportunity to promote social procurement on a large scale. In 2021, two motions were approved by City Council that strengthened the Inclusive Economy Team's ability to work in the City to promote social procurement. These experiences left the Inclusive Economy Team with advanced knowledge in navigating social procurement and community employment benefits (CEB), which they could apply locally and help them contribute to a national working group—the Buy Social Canada Community of Practice—on community benefit agreements. In 2023, the Team shared its successes and challenges of the Marigold Infrastructure Partners' CEB with the city (as detailed in the previous paragraph). As such, the Inclusive Economy Team has been sharing their social procurement and CEB learnings with practitioners in Edmonton but also with other jurisdictions through the national working group (i.e., the Buy Social Canada Community of Practice).

Assisting a Social Procurement Agency (Embers) Being Established in Edmonton

The Inclusive Economy Team engaged in system mapping and in doing so, identified a major gap in the employment system: the need for an experienced social procurement agency. Because of their knowledge of the sector, the Inclusive Economy Team started conversations with a Canadian social enterprise, Embers, and supported Embers in their feasibility assessment and eventual establishment of an office in Edmonton in 2023. The Inclusive Economy Team has continued to be intentional about this relationship and the impact of this agency opening in Edmonton could be very significant for social enterprise practices and legitimacy.

Contribution to Systems Change

During the 2022-2023 evaluation year, the Inclusive Economy Team contributed to systems change by:

Educating/Building Awareness/Convening

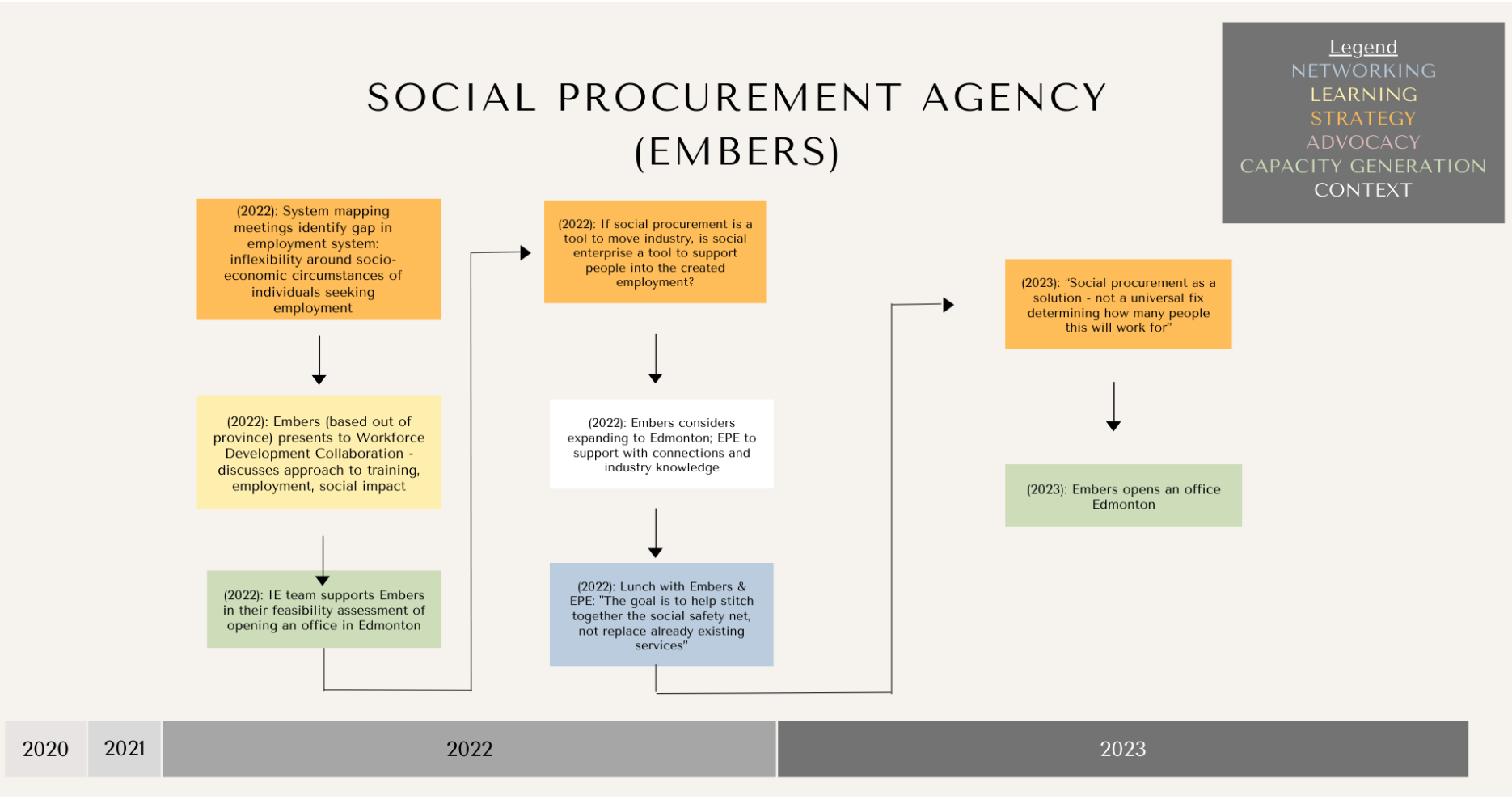
- Presenting to and attending a wide variety of community gatherings/meetings to forward education on building an inclusive economy in Edmonton.

- Building partnerships with key players to raise awareness about inclusive economy practices
- Organizing and participating in “Buying and Selling Social with Impact” workshop to enable local non-profit, social enterprise, and business groups to become more educated and connected with other organizations and businesses interested in social procurement.
- Sharing their knowledge about navigating social procurement and community employment benefits (CEB) with local practitioners and at the national level (Buy Social Canada Community of Practice).
- Convening the Alberta Living Wage Network and the City of Edmonton to clarify and determine the City’s interest in supporting a living wage policy.

Advocating

- Embedding inclusive economic opportunities in the City’s bids/proposals/events such as FIFA and World Junior Hockey.
- Promoting community employment benefits (CEB) and encouraging the City to include accountability measures in all contracts with CEBs, including Marigold Infrastructure Partners—the company responsible for building the Valley Line West LRT.
- Working with the City of Edmonton’s Sustainable Procurement Policy to promote social procurement on a large scale.
- Working with the Alberta Construction Association in applying for funding for social procurement.
- Facilitating the establishment of a Canadian social enterprise, Embers, in Edmonton to fill an identified gap for an experienced social procurement agency.

SOCIAL PROCUREMENT AGENCY (EMBERS)



Areas for Future Consideration

This evaluation has tracked the learning and actions of the Inclusive Economy Team and the way these learnings influence and impact their strategy. From the successes, challenges, and progress of the Inclusive Economy Team in this evaluation period, we have noted some areas for future consideration. These are organized by strategic priority.

Strategic Priority 1: *To build networks to share information, provide mutual support, & advocate for inclusive economy policies*

Building networks with and between inclusive economy actors in Edmonton is one of the Inclusive Economy Team's strongest areas of work. Within their focus on connecting and convening, they found some of their greatest successes in "keeping a pulse" on the inclusive economy space in Edmonton and becoming a trusted and established resource in Edmonton. This work needs to continue and expand. The gap that the Inclusive Economy Team is filling in Edmonton responds to the issue described below:

> "I think the challenge for us is, you know, in connecting with these external agencies, and understanding them, understanding their clients, understanding who we are, why are we calling them, right? How do you contact somebody at [an organization]?" (Construction Company)

The Team can continue to build actionable partnerships out of the many groups and organizations that EPE's Inclusive Economy Team has already been networking with. This avenue would continue to cement the Inclusive Economy's role as network broker and allow the Team to continue its growth as a trusted and helpful Edmonton resource. Strengthening its connections is essential if the Team hopes to enact systems change. Tending to actionable partnerships would contribute greatly to the Inclusive Economy game changer's goal of advocating for inclusive economic strategies, which requires the support of a wider network. As connections between network members strengthen, so too could the feasibility of joint advocacy and strategy work.

Strategic Priority 2: *To advocate for the adoption & implementation of inclusive economic approaches and plans within Edmonton's economic development sector*

The Inclusive Economy Team has been able to take action from the 2022-2023 evaluation year's many policy advocacy learnings including a social procurement strategy at the municipal level (within the City of Edmonton's Economic Plan), pushing for community employment benefits (CEB) recommendations and accountability at the federal level, and

timing policy “asks” effectively. This work should continue. One suggestion for the Inclusive Economy Team’s future growth around advocacy comes from a network member’s experience as stated below.

> “I think the biggest challenge I've seen in working with EPE is their work is based very much in the theoretical and not in the concrete. So it's difficult when they talk about social betterment to give concrete examples of exactly what can be done. It's fine to tell people, oh, you should purchase from a social enterprise. But if they don't know what a social enterprise is, if they can't list off the social enterprises we have operating in our community, if they don't know what goods or services are available from a social enterprise…they can't take action. I feel like there's a missing step of this theoretical idea and then these concrete first steps that could be taken.” (Non-Profit Organization)

It must be noted that unfortunately, the member’s requests (e.g., list of social enterprises) requires more support from the Team than possible with current resources.

Strategic Priority 3: *To advocate for the adoption & implementation of economic reconciliation approaches*

The Inclusive Economy Team set out this evaluation year to establish an economic reconciliation collaboration. As the 2022-2023 year has been focused on internal economic reconciliation work, future work undertaken by the Inclusive Economy Team could include establishing the economic reconciliation collaboration group. The Inclusive Economy Team can build from the foundation-setting phase of their external economic reconciliation work to the implementation and/or experimentation phase and continue to explore possible economic reconciliation approaches in Edmonton’s economic sector. This is exciting and extremely innovative work that Edmonton can be considered a leader in. In addition, the Inclusive Economy Team can potentially create an economic reconciliation framework.

Strategic Priority 4: *To identify the economic systems & policies we want to change, develop a process/plan towards this change, & test options for inclusive economic approaches*

During the 2022-2023 evaluation year, the Inclusive Economy Team has made considerable progress on this strategic priority; they have successfully identified inclusive economic approaches, policies, and strategies that are appropriate to the Edmonton context and tested a few key models and options for these approaches (i.e., the apprenticeship cohort initiative in partnership with A&H Steel and the liaison support initiative in partnership with Delnor and several local workforce development agencies).

The Inclusive Economy Team should continue testing models for building an inclusive economy. No one else in the City is doing this. Additionally, the Inclusive Economy Team has indicated continued interest in learning more in depth about the working poor demographic in Edmonton; the Team should decide whether this is still a relevant goal and, if so, build it into future work plans.

Strategic Priority 5: *To engage in strategic learning about efforts in inclusive economy to ensure decision-making is evidence informed*

In this evaluation year, the Inclusive Economy Team made strong progress on strategic learning for evidence-based decision-making within the Inclusive Economy Game Changer. Ultimately, the Inclusive Economy Team strengthened relationships and trust with their partners to improve how they work and learn together, especially on complex and politically charged issues. As the Inclusive Economy Team continues to interact with the communities of practice that have emerged around interests in building an inclusive economy, their role as connectors and convenors remains critical.

One area of growth for the Inclusive Economy Team in future years is to further initiate conversations with other Game Changers regarding collaboration and impact on each other's work as described by a staff member in the quote below. This will improve EPE's organizational consistency and efficiency of work, and work to combat the potential "siloing" of projects and discussions.

> "I think we work to see opportunities for those things to thread across or through inclusive economy. And we have a practical understanding of how they impact how racism and, yeah, lived experience really are meaningful in our work. But I don't feel like there's a lot going the other direction. Like no one's asked, lived experience [game changer and staff], how inclusive economy impacts their work. So they're not thinking about that, which is where there's more of a breakdown." (Staff Interview)

Another area of growth emerging from the Inclusive Economy Team's strategic learning is a need for staff to feel connected to EPE as a whole, especially given that the work itself involves weathering many unexpected ebbs and flows. Members of the Inclusive Economy Team shared that strong governance is vital to sustainably navigate the tumultuous work of systems change. As such, we recommend that EPE engage all its members in re-examining its governance framework and ensure all its staff are aware of expectations and support systems.

Strategic Priority 6: *To share learning with key players in the workforce development and social procurement space to raise awareness about their work in building an inclusive economy*

As the Inclusive Economy Team worked during the 2022-2023 evaluation year to share their learnings with their network and community, they were able to achieve considerable progress. Specifically, they were able to further raise awareness through key partnerships for building an inclusive economy, promote community employment benefits (CEB) accountability measures, share their advocacy learnings locally and with Buy Social Canada, help a social enterprise become established in Edmonton, and improve communications between EPE and the general public.

The Inclusive Economy Team is very aware of the polarizing effect of the inclusive economy discourse. As groups with traditionally different interests need to find common ground for an inclusive economy to operate, the Team should continue their exemplary approach to the use of disarming language that promotes shared understanding. In service of systems change, the Inclusive Economy Team functions best when it is catalyzing opportunities for partnership between non-profit organizations, government, and industry.

Appendix A: Evaluation Framework

Objectives	Indicators	Results
Strategic Priority 1: To build networks to share information, provide mutual support, & advocate for inclusive economy policies	Network shares learning with each other so network members are aware of & understand inclusive economy ideas & strategies	Interviews with network members, including but not limited to leaders of WFDC organizations, indicate learnings are in the process of being shared.
	Maintenance of relationships & communication efforts	Learning logs and/or strategic learning debrief with inclusive economy Team and network evaluation indicate maintained relationships and communication efforts.
	Network advocates for inclusive economic strategies	EPE data tracking (including #/description of meetings/communications related to policy adoption & implementation) indicate the Inclusive Economy Team have made significant efforts to advocate for inclusive economic strategies to be adopted in Edmonton.

Strategic Priority 2: To advocate for the adoption & implementation of inclusive economic approaches and plans within Edmonton's economic development sector	Information & idea sharing between City of Edmonton & EndPovertyEdmonton Contribute to development and review the City of Edmonton's Economic Action plan	EPE data tracking, interviews (e.g., City of Edmonton partners), document review of submission to City of Edmonton, and strategic learning debrief with the Inclusive Economy Team all indicate information sharing and development of inclusive economy approaches in Edmonton's economic development sector. Next steps: • Continue to engage with City of Edmonton on their Economic Action plan
	Information & idea sharing between City of Edmonton & additional key contributors, including: • Join Team Edmonton (Economic Development Planning Group - ECDC) • Join Explore Edmonton Regeneration Committee • Communicate with, collaborate with, and advocate to additional key contributors for an inclusive economic approach (including	Data tracking indicates that the Inclusive Economy Team have made connections with various individuals and branches within the City of Edmonton and the Government of Alberta especially to advocate for policies regarding building an inclusive economy in Edmonton. Members of the Inclusive Economy Team have joined Explore Edmonton's Regeneration Committee, but have yet to

	voices of people with lived experience) (i.e., Explore Edmonton, U of A, Government of Alberta, etc.).	join Team Edmonton. Many learnings about policy advocacy have taken place, but action upon these learnings is still in progress. Next steps: • Join Team Edmonton (Economic Development Planning Group) if this remains a goal • Continue learning about policy advocacy with government, especially at the federal level
	Strategy for policy advocacy developed and adapted based on learning from lobbying firm and prior advocacy Specific goals: • Meeting with the NDP policy director • Meeting with UCP policy director • Relationship development with key policy leaders in government and opposition • Inclusive economic lens incorporated in NDP/UCP platform	Strategic learning debriefs, learning debriefs, and document review indicate that the Inclusive Economy Team have made concerted efforts to determine best practices for policy advocacy relating to inclusive economy in Edmonton. However, the Inclusive Economy Team was not able to fully enact these practices this evaluation year due to timing errors on the part of their consultant. Next steps:

		• Create a clear timeline of policy advocacy necessities
<u>Strategic Priority 3:</u> To advocate for the adoption & implementation of economic reconciliation approaches	Broader array of Indigenous knowledge and perspective included in economic decision-making Knowledge and respect for Indigenous ways of knowing & doing Information & idea sharing between government, business and the Inclusive Economy Team	Data tracking and interviews with Indigenization Game Changer directors indicate that economic reconciliation has been further embedded into the Inclusive Economy Team's perspectives. Next steps: • Continue to embed these perspectives internally at EPE
	Exploring what economic reconciliation means in the context of Edmonton's economy through: Economic reconciliation community engagement Establishing an economic reconciliation collaboration	Data tracking, EPE staff interviews, and document review of staff interview notes indicate that staff have attempted to highlight potential for economic reconciliation with inclusive economy strategies, both internally and externally. Next steps: • Create an economic reconciliation framework/learning for inclusive economy approaches

	Inclusive Economy Team develop goals/strategies/tactics reflective of an Indigenous worldview in their work	Indigenization Team leading sessions on Indigenous ways of knowing and being for all EPE staff Next steps: • Future work plans include goals/strategies/tactics informed by Indigenous ways of being and knowing
<u>Strategic Priority 4:</u> To identify the economic systems & policies we want to change & develop a plan towards this change	Identification of inclusive economic policies, approaches, & strategies Strategies employed in advocating for an inclusive economic recovery	Literature review, participant observation, interviews, and document review indicate economic policies, approaches, and strategies appropriate to the Edmonton context are being identified. These strategies are in the beginning stages of being implemented.
	City of Edmonton receptive to the Inclusive Economy Team's support in developing their social procurement policy City of Edmonton adopts and implements social procurement policy	Strategic learning debrief with the Inclusive Economy Team indicates that they are dialoguing with the City of Edmonton regarding the possibility of the Inclusive Economy Team in moving forward developing a social procurement policy for the City of Edmonton.

	Improve knowledge of working poor and explore capacity options for research on working poor and lived/living experience • ESPC • CUP • EPE • Other	On Hold - data tracking indicates that this area of work has been put on hold for the 2022-2023 evaluation year due to lowered capacity. However, interest around this activity remains.
	Learn from people in apprenticeship cohort initiative	Data tracking shows that the Inclusive Economy Team has gained a lot of experience and knowledge from the apprenticeship cohort initiative. Next steps: • Determine if cohort model is effective in other settings/contexts in Edmonton (further experimentation)
Strategic Priority 5: To engage in strategic learning about efforts in inclusive economy at the systems level, in workforce development & in social procurement to ensure decision-making is evidence informed	Ongoing reflections on plans, progress, & challenges made by Inclusive Economy Team Decision-making & strategies are adapted based on learnings	Data tracking and strategic learning debriefs indicate ongoing reflection throughout the evaluation year. Triple loop learning framework focus group with inclusive economy Team & CUP indicates adapted decision-making based on learnings.

	EPE & CUP leadership & Teams commit to & engage in strategic learning	Participant observation at strategy tables/during strategic discussions & decision-making indicates strategic learning culture is in progress.
	Strategies adapted, if possible, as a result of strategic learning Evaluation is flexible & responsive to changes in priorities & context Strategies strengthened as a result of evaluation	Strategic learning debrief with CUP & inclusive economy Team indicates evaluation results are considered in strategic decisions as CUP & EPE learn together from mistakes & successes.
	EPE creates map of current & ideal system with potential drivers of system change EPE determines options for policy advocacy & advocacy to educational institutions CUP identifies employment approaches & strategies that help to move people out of poverty	Strategic learning debrief with the Inclusive Economy Team Summary of learning from all data sources Surveys & interviews with workforce development agency clients
	Increased learning of the workforce development system	Strategic learning debrief with inclusive economy Team, report documenting a range of rural and urban inclusive economies strategies and initiatives created, document review

		on workplace development initiatives relevant to the Edmonton context
<u>Strategic Priority 6:</u> To share learning with key players in the workforce development and social procurement space to raise awareness about their work in building an inclusive economy	Connect & network with: • Industry • Start-up incubators • Business associations • Academic institutions • Workforce development agencies • Unions • Social enterprises Events to share learning Presentations, reports, meetings, publications, etc.	Strategic learning debrief with the Inclusive Economy Team and EPE data tracking indicate events and presentations attended or hosted by the Inclusive Economy Team have continued to build inclusive economy networks and support. One considerable complication has been the communications role at EPE being unfilled and in flux until spring 2023.
	Working with Buy Social Canada to offer workshops for social value suppliers	EPE data tracking and strategic learning debrief indicates engagement at workshops by social value suppliers (such as the Buying and Selling Social with Impact event in partnership with Buy Social Canada, AB Seed, and MacEwan University).

Appendix B: Description of Methods

Strategic Learning (continued)

In this evaluation, we chose to track learning and to use a development evaluation approach in order to "feed" back insights and analysis to the Inclusive Economy Team throughout the evaluation process for their own continual learning. This approach helped us to engage in strategic learning about efforts in inclusive economy at the systems level, in workforce development and in social procurement, to ensure decision-making is evidence informed. The indicators used to track this approach included:

- Description of learnings, including changes in decisions, assumptions, hypotheses, strategies
- EPE & CUP co-develop an organizational culture of strategic learning
- Evaluation is worth time & effort
- Evaluation results considered in strategic decisions
- CUP & EPE learn together from mistakes & successes

Strategic Learning Debriefs

Strategic learning debriefs create time and space for learning. They are an opportunity to purposefully and collectively present and explore different types of learning, including systematic data collection and analysis and intuitive and experiential learning. This process involves dialogue ("thinking together") which relies on participants who make a commitment to let go of their assumptions about each other and the strategy to have a more effective dialogue about what has been learned and its implications. Through these debriefs, our goal as evaluators was to facilitate the Inclusive Economy Team's reflection on the learning and to build a shared understanding of its implications, as well as apply the learning directly to the strategy and determine actions that need to be taken (whether changes in strategy or changes in learning). Within the evaluation period, the Inclusive Economy Team submitted 52 strategic learning debriefs, which we collected as Google Form submissions and as notes from one-on-one debrief meetings with staff members.

Strategic Learning Meetings

We utilized strategic learning meetings (7) in addition to debriefs to further create a space to unpack experiences and learnings together. A crucial component of this was remaining aware of the different backgrounds, experiences, and knowledge of each person participating in order to respect the different assumptions and perspectives being created. At the start of the strategic learning debriefs, we would remind the Inclusive

Economy Team to focus on what we are learning instead of what we are accomplishing because, in this complex, ambiguous, and shifting environment, “failure” or a inability to achieve a hoped for outcome is a given. In these monthly meetings, facilitated by CUP researchers, the Inclusive Economy Team participated in an open discussion of current activities, learnings, and strategy. These sessions were usually 1.5 hours in length and involved as many members of the Inclusive Economy Team as possible.

Individual Interviews

Individual or one-on-one interviewing was chosen as a method for this evaluation given the space it provides to ask “how,” “what,” and “why” questions and to speak with participants about experiences and perceptions that may be deep-seated or concealed, but may be shaping their thoughts and actions” (Mayan, 2023, p. 155).

As an alternative to the strategic learning debriefs, two Inclusive Economy Team members chose to participate in individual interviews about their monthly learnings. These monthly interviews varied in length depending on the number of projects the Team members were working on month by month. In the 2022-2023 evaluation period, one Team member was interviewed 8 times and another was interviewed 4 times (note: interviews with the latter Team member began halfway through the evaluation period, as it was determined that it was a more effective way to capture necessary data than the learning debrief responses method used by other Inclusive Economy Team members). We also conducted individual interviews with 22 participants from network analysis interviews to inform the network analysis component of this evaluation.

Emergent Learning Tables

An emergent learning table is a method which involves asking a framing question of the participants (for example, “How can the Inclusive Economy Team shift the Social Procurement system to help move people out of poverty?”) and looking into four separate categories of learning:

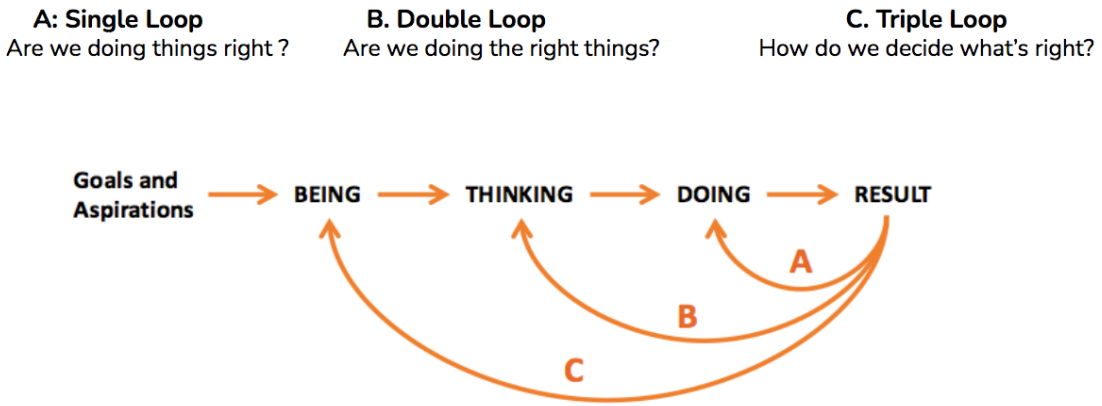
- Insights: What’s the same? What’s different? What’s surprising?
- Knowledge and experience: Stories | Data | Research | Knowledge | Experience
- New ideas: Past lessons into new theories
- Opportunities: New initiatives | Upcoming events | Important meetings

Emergent learning tables bring people together around a shared question of “What do we know so far?” concerning an area of work such as social procurement (Fourth Quadrant Partners, 2020). Because emergent learning tables can be put to us in discussing learning as grounded in data and experience (p. 2), they offer an effective

method for determining how the Inclusive Economy Team were experiencing changes in their learning and how they would apply it in action. At the start of the evaluation period, five emergent learning table sessions were held with the Inclusive Economy Team.

Triple Loop Learning Sessions

We used triple loop learning to organize learning about a "complex" challenge to create change (Tamarack Institute, n.d.). The below framework helps to visualize this method (Stillman, n.d.):



When using the triple loop learning method, the facilitator begins with asking questions of participants that correspond with the "Single Loop," which attempt to understand the basis of learning in poverty elimination work, asking questions such as "What are we learning about what we are doing?" and "What can we do differently to achieve a different result?" The responses to these questions set the precedent for "Double Loop" questions, which require participants to reflect on what they are learning about their assumptions, understanding and thinking, as well as the challenge to be addressed and the system and context in which it is embedded. Lastly, in discussing the "Triple Loop," we asked the Inclusive Economy Team questions which delve into "being." This included questions such as "What are we learning about how we are being?" and topics such as emotional triggers, habitual/responses, social norms/group dynamics, and values and narratives (Barbat et al., 2011; Cabaj, 2019).

Participant Observation

As defined by Mayan (2023), "participant observation is the process of personally participating in the research setting" (p. 165). In this evaluation, participant observation

was employed to observe both the Inclusive Economy Team's work in the public sphere and how the public reacted to EPE and their work. The main settings where we, as evaluators, used participant observation were during meetings, webinars, and other spaces where EPE presented or discussed their work.

Given our dual role of evaluator and partner with EPE, the types of participant observation we practiced for this research included *observer as participant* (which refers to mainly watching the situation or activity and being involved on a secondary basis) and *participant as observer* ("fully involved in the activity but [takes] time to record observation" [Mayan, 2023, p. 166]). These postures allowed us to be attentive to rigorous data collection while also acknowledging our presence and involvement in EPE's structure (again, as evaluators and research partners).

Document Review

As a common method of data collection and analysis, document review involves gathering documents (such as minutes of meetings, annual reports, media write-ups, etc.) to undergo a qualitative analysis relevant to the topic and purpose of the research (Mayan, 2023, p. 170). For this evaluation, we reviewed documents regarding inclusive economy and/or EPE's work more broadly. The bulk of these documents consisted of meeting minutes and learning debrief responses, but as evaluators we also included documents that the Inclusive Economy Team forwarded to us and documents that filled gaps in our knowledge of their work. Our use of this method was cumulative and context-driven; for this evaluation, we analysed all documents in conjunction with one another as a fulsome record of EPE's inclusive economy work.

Network Analysis

We included a network analysis as a part of the Inclusive Economy evaluation. Briefly, a network analysis involves collecting qualitative data (reflections, feedback, discussion, etc.) on EPE and their work from the perspective of those in their network. The purpose of using this type of analysis was to better measure the influence and impact of EPE's work in the local Edmonton context. In this case, this network analysis included hiring a third-party researcher to interview other organizations and individuals working in the inclusive economy space in Edmonton about EPE and their work. The network analysis also responds to a main objective set out in EPE's inclusive economy work plan and, thus, our evaluation plan: To build networks to share information, provide mutual support, & advocate for inclusive economy policies (Strategic Priority 1).

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