



Toward Belonging

A Case Study in DEI Strategy Development

WeBC IS FUNDED BY PACIFIC ECONOMIC DEVELOPMENT CANADA

THIS STUDY IS FUNDED BY INNOVATION, SCIENCE AND ECONOMIC DEVELOPMENT CANADA (ISED) AS PART OF THE GOVERNMENT OF CANADA'S WOMEN ENTREPRENEURSHIP STRATEGY





Dear WeBC Partners and Community,

This DEI Case Study reflects our ongoing journey to embed diversity, equity, and inclusion into every layer of our organization. In this work, we've developed a DEI strategy shaped by listening—to those we've served and those we've yet to reach. It's a reflection of our commitment to creating safer, more inclusive spaces for self-identifying women, non-binary, and gender-diverse entrepreneurs.

Our goal is to reduce barriers to accessing capital and supports—through WeBC's own loans and programs, and by advocating for inclusive financial products across the ecosystem. To do this well, we know our learning must include staff, volunteers, mentors, facilitators, and ambassadors. We are now building the supports and expectations to guide this collective learning and growth.

We share this report at a time when many organizations are being asked to scale back social justice efforts. Instead, we offer this case study as an invitation: use it to spark conversation, promote colearning, and explore what DEI could look like in your own organization. This is not a prescriptive toolkit with steps to follow, and we caution against replicating our approach without listening to your community and reflecting internally. DEI work is complex, imperfect, and deeply personal to each organization—but it is necessary.

WeBC has always believed in sharing knowledge and building together. We hope this case study helps demystify the work, illuminate the resources required, and inspire others to take action—with courage, humility, and care.

Thank you to the Government of Canada and Innovation, Science and Economic Development Canada (ISED) for funding this much-needed work—and for their belief in inclusive entrepreneurship, which helped us take bold steps toward change.

With appreciation and resolve,

Shauna Harper.

Shauna Harper - WeBC CEO

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Case Study

Introduction

Entrepreneurs across British Columbia face a wide range of challenges—some visible, many not. At WeBC, we wanted to better understand what support looks like for those whose experiences are shaped by race, gender, culture, ability, and other intersecting identities.

In 2024, we partnered with research and evaluation consultancy <u>AND Implementation</u> to listen deeply and learn from diverse entrepreneurs about what they need to feel supported in their business journeys—and how we can respond with programs and services that reflect their realities.



We have prepared this report and conducted this research from Kelowna, the traditional, ancestral, and unceded tmxwúla7xw (land) of the Syilx people who have resided here since time immemorial. We recognize, honour, and respect the Syilx lands upon which we live, work, and play.

WeBC is committed to working towards truth and reconciliation by continuing our learning as an organization and team.

Using the Case Study

This case study aims to share the approach and lessons learned along the journey with fellow entrepreneur-serving organizations to support collective action in service of equity in BC. Because not all organizations have the funds, staff/consultant capacity, and protected time to conduct a DEI deep dive like WeBC, the purpose of this case study is to help organizations get started in their journey by identifying what they are already doing well and what else is needed to do effective equity work in their contexts.

WARNING: This is not a prescriptive model of DEI work nor a one-size-fits-all suite of recommendations. Organizations are discouraged from replicating steps or recommendations from WeBC's journey to short-cut the important yet messy, ungratifying, and imperfect work of DEI. A drag-and-drop approach may cause harm.

This document is not a cut-and-paste roadmap to inclusion. Rather, this tool may be used to:





Demystify DEI work for organizations that have not explored related opportunities and responsibilities



Identify what guidance/expertise may be required to support organizations at key points in the process to mitigate unintended harms or pitfalls



Foster resource-sharing and transparency within the sector



Promote co-learning and collective action as an ecosystem



Identify what funds and resources are required to do DEI work well in different organizational contexts



Spark conversation and action by adapting WeBC's lessons learned

The Journey

Planning

Co-designing a meaningful DEI study by anchoring this work in shared values and context-specific goals

Doing

Carrying out exploratory data collection by gathering relevant feedback and pivoting as needed

Learning

Surfacing positive and critical reflections on how current strategies align with DEI priorities

Committing to Change

Co-creating data-driven and strengths-based strategies for change



Start small and avoid templates or one-size-fits-all strategies that do not reflect your organization



Use what you have, add as you go, and stay nimble to account for emerging learning



Celebrate wins and stay curious about critical findings



Address the big picture, pair action with support, and honour your "special sauce"

Together with the consultants we:

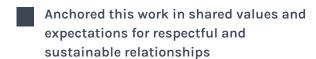
Unpacked what diversity, equity, and inclusion means for us

To help narrow the focus of the study and ensure a feasible and thoughtful approach, priority groups were identified to elevate the voices of entrepreneurs who experience disproportionate systemic barriers in business



Created a communication and learning cadence to

(a) continuously adapt the project to suit emergent contexts, and(b) share learning as it arises (rather than waiting for the final report)





Decided on activities to collect information to

(a) answer questions and(b) appropriately engage folks across different vantage points and experiences (i.e., staff, clients, and partners)



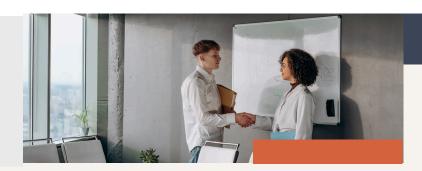


Crafted guiding questions to organize and anchor this work

For this study, WeBC defined priority groups as entrepreneurs who are: (a) non-binary, trans, and/or gender diverse, (b) Indigenous, (c) located in rural or remote areas of British Columbia, and/or (d) immigrants.

The Planning Process

WeBC benefitted from having the resources to hire consultants, dedicate staff time to participate in facilitated planning and co-creation sessions, and have a customized process. While not all organizations will have the same budget to do this work, learning can be shared from this planning process.



Learning to be shared from the planning process:

1. Start with values.

DEI projects encounter twists and turns, surprises, and difficult moments. Values help bring clarity and sturdiness—especially in more difficult moments. For example, in our first planning meeting, we agreed that care, growth, honesty, and use were the guiding values for this work together. When we encountered choice points, twists, and difficult findings, returning to these values helped to make the best possible choices for the project and team.

2. When it comes to DEI, the messy and ungratifying work is the important part.

Be wary of one-size-fits-all templates, recycled guides for organizational learning, or easy steps to achieve DEI. Off-the-shelf tools do not offer the same ability to be nimble, adapt to emergent contexts and needs, or honour the strengths and wisdom of organizations.

3. Craft a few simple and meaningful goals or guiding questions for organizational DEI work.

Be specific to your organization and context. What is meaningful and feasible for you to explore right now, with the resources you have, and to serve your community? This could look like:

- Checking an assumption.
 (e.g., is our organization reaching/engaging who we are intending to?)
- Exploring an unknown
 (e.g., who [else] is our organization reaching/engaging?)
- Unpacking a value proposition (e.g., who does our organization reach/engage well?)

Doing The path that WeBC took

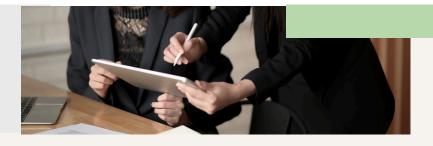
To carry out this study, the following data collection activities were implemented.

- 1. Document Review: Consultants reviewed existing WeBC documents and related studies conducted in the ecosystem
 - (e.g., The State of Women's Entrepreneurship in Canada Report (1)) to build on existing work done to identify systemic barriers for women entrepreneurs in Canada.
- 2. Ecosystem Organization Survey and Entrepreneur Survey: Stakeholders' engagement was designed to learn what we can do better to foster sense of belonging for entrepreneurs in our community:
 - a. A survey was launched for representatives of organizations in the ecosystem to explore previous engagement with, and current perceptions of, WeBC (n=52). Key topics also included data practices around sex and gender, perceived gaps in services and programs for their clients/members, and supports wanted from us.
 - b. A survey was launched for entrepreneurs in our database to explore (a) entrepreneurs' experiences of systemic barriers and (b) entrepreneurs' perceptions and experiences of WeBC (n=247).
- 3. Manager Session: Based on the emerging findings from the two surveys, together with the consultants we:
 - a. Surfaced important learning.
 - b. Identified current and potential strategies to align programming with DEI priorities.
- 4. WeBC Staff Interviews: To dive deeper into staff's understanding, perception, and experiences of carrying out DEI strategies and supporting priority entrepreneurs, consultants conducted 30-minute individual interviews with WeBC staff (n=9).
- regarding DEI, the consultants facilitated three online focus groups with women (inclusive of trans women), non-binary, and/or gender-diverse entrepreneurs (n=13). Ahead of the focus groups, entrepreneurs were invited to take a photo representing what it means to be included in services intended to support their business. Acting on feedback from the entrepreneur survey and participant demographic, we decided the host the following 3 groups:
 - a. One focus group was held for all entrepreneurs, with priority given to entrepreneurs from priority groups.
 - b. One focus group was held only for entrepreneurs with disabilities/who are disabled.
 - c. One focus group was held only for entrepreneurs who are non-binary, trans, or gender-diverse.

Momen Entrepreneurship Knowledge Hub (2023). The State of Women's Entrepreneurship in Canada. Accessed on July 15, 2024 from https://wekh.ca/research/the-state-of-womens-entrepreneurship-in-canada-2023/

The path that WeBC took





Responding to what emerges:

Life happens! Implementing this project required the flexibility to respond to emergent contexts and new learning. We held an additional manager strategy session after the surveys surfaced important, yet difficult, reflections about gaps and oversight in service delivery for entrepreneurs with disabilities/who are disabled and those who are trans, non-binary, and gender-diverse. The conclusion of the meeting was that more thoughtful work was needed to safely explore staff and entrepreneurship perspectives. So, we pivoted:

- Instead of a staff survey to look at broad feedback, we facilitated individual interviews to dive deeper.
- Instead of hosting one focus group with entrepreneurs, we facilitated three.

Due to the high percentage of survey respondents with disabilities/who are disabled, we offered one group just for entrepreneurs with disabilities/who are disabled.

Due to safety concerns raised in the survey, we offered one group just for entrepreneurs who are trans, gender-diverse, or non-binary.

Iterative Learning in Practice

While not all data collection strategies will work well (or the same) across organizations, here are some key lessons learned from this journey:

1. Start small, use what you have, add as you go, and pivot as needed.

- Review existing data. Does your organization already have access to valuable insights? Data do not need to be fancy to be helpful. You might need to review meeting minutes for feedback about a past program, chat with that colleague who holds all the institutional memory, count the number of emails and phone calls required to build a new relationship, or scan feedback forms from past events.
- Check your data against the goals and questions above, and identify what is missing. Do you need new data? If so, what information do you need (from whom, about what). If not, great. There's no need to add more.
- Consider options for gathering relevant data with tools that are appropriate and meaningful for your community. Here is what we discussed when planning this project:
 - Surveys are familiar to most and are great if it is important to gather a lot of information about a few specific topics. But, like pop-up ads, surveys can be a social nuisance. People need a strong incentive to participate (e.g., a relationship to the organization or financial compensation). Ultimately, this project opted to have two surveys because there was a budget to offer a raffle, an existing list, a communication department to craft strong messaging (and reminders), and the purpose was to get feedback from many.
 - Interviews are also familiar to most, have formal and informal variations, and are great when (a) it is important to gather deeper insights from a few people, and (b) there is an openness to learning (e.g., exploring an unknown). But, interviews require trust. This project pivoted into interviews after the survey surfaced unexpected results, and it was important to dive deeper and explore unknowns.
 - Focus groups may not be as familiar or as safe as interviews. They work well when the goal is not only to gather deep insights from a few, but also to capture the wisdom from group thinking (e.g., where folks agree and disagree). But, focus groups require a strong facilitator and attention to group dynamics and possible safety concerns. For example, transphobic comments in the survey prompted us to organize a focus group only for trans, gender-diverse, and non-binary entrepreneurs to prioritize safety.
 - Arts-based data may not be as familiar. This novelty can help create unique opportunities for folks to
 express themselves. Arts-based techniques work well when (a) it is important to gather deeper reflections
 from a few, (b) you explore a topic that is difficult to talk about directly (e.g., inclusion), and (c) there is an
 openness to learning. This project used a photo-elicitation activity to invite entrepreneurs to reflect on
 what it means to feel included and resulted in a set of key characteristics of what inclusive business
 supports do or do not do.
- Try one data collection at a time to see what is working and create the wiggle room to adapt as needed.

2. Collecting demographic data is complicated

Is it safe, respectful, useful, or necessary to ask people about their identity? Which aspects of their identity? How do you describe and detangle interconnected identity markers?

What is the experience of ticking a box or several boxes to represent the complexity of who you are?

We grappled with all these questions (and more) when deciding what to ask, of whom, and when. There is no one right answer.

Ultimately, here is what we found helpful:

- Start with use in mind. Though imperfect, we proceeded by asking only questions that were needed to minimize data waste and tick-box fatigue. We asked only for the information we intended to use.
- We used a combination of checkboxes and open-ended options so folks could choose from existing categories or describe themselves however they wanted. Open-ended answers required more work to clean and analyze, so this option should be offered when there are resources to manage the data.
- Aligning with our value of taking an intersectional view of identity, we explained why this data was being asked and stated that it is an imperfect strategy for understanding the complexity of who people are. Naming this limitation upfront and affirming that people are not a sum of tickboxes intended to mitigate participants' anxieties around answering these questions.



Learning

We found that our key strengths are grounded in WeBC's organizational culture and our team's dedication to supporting entrepreneurs to further economic equity for women, which is reflected in our programs and services. The themes of being caring, welcoming, and helpful came through strongly in the focus groups. Most organizations who participated in the survey perceived us to be addressing systemic barriers and providing relevant/wanted programs and services.

At the same time, data indicated that staff are not on the same page about what DEI means for our organization. Specific concerns surfaced regarding our capacity, intention, and ability to expand our mandate to support entrepreneurs who are trans, non-binary, and/or gender diverse in addition to our existing mandate to support women. Data also demonstrated WeBC's oversights in accessibility and our efforts to intentionally engage entrepreneurs with disabilities/who are disabled. Because we didn't have a DEI strategy, data could not identify concrete or cohesive DEI efforts overall.

Lessons learned from the Learning Stage:



It was affirming to learn what we are doing well and where hard work has paid off. At the same time, mistakes and critical feedback were important teachers. Here's what worked well in working through uncomfortable learning:

Rolling findings up to the level of decisions or behaviours and organization policy/protocol to avoid blaming or shaming any individuals.

This way, we all share the responsibility and are accountable for learning.

- The consultants made sure to come to all strategy sessions with evidence of what is working to celebrate the wins.
- 3. Staying curious about the critical feedback and asking follow-up questions.

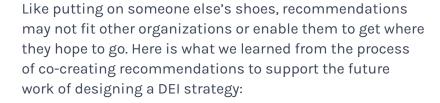
 By digging into the details, we could allow icky feelings to surface and brainstorm solutions rather than dwell on mistakes.

Committing to Change

As a result of these findings, we had a workshopping session to co-create data-driven and strengths-based recommendations (see Appendix A).

Specific concerns and preferences shared by entrepreneurs and organizations in the ecosystem were used to ensure that recommendations meet expectations within the ecosystem and align with what is wanted and needed. With funding and feasibility in mind, strategies were pared back to support actionable steps.

Learning to be shared from committing to change:





In this project, it was important to anchor all recommendations in the mandate. We are mandated to support gender equity and the full unhindered participation of women in Canada's economy. Yet, this DEI work raised an important question about our ability and responsibility to serve gender-expansive entrepreneurs (i.e., non-binary, Two-Spirit, agender, gender-fluid, gender-queer) who face systemic barriers to economic participation.

Entrepreneurs in this study did not want to be forced to align with a gender, seen as a sub-group of women, or erased/overlooked by not being recognized outright in the mandate. So, we chose to clarify that we serve women (trans-inclusive), and gender-diverse entrepreneurs. This decision and rationale will be publicly communicated (to mitigate confusion) and used to inform the subsequent steps of the DEI plan.



2. Recommendations in this project strategically pair "doing" with "supporting."

Because findings illustrated our strengths lie in the organizational culture and the norm for staff to support each other, each suggestion to change (e.g., adopt a new strategy or engage in new learning) is coupled with a strategy to support staff (e.g., with dedicated time for conversation and troubleshooting and resources). This way, DEI work becomes an extension of our organizational culture.

The pairing also mitigates risks of DEI work becoming punitive or the responsibility of a few staff to champion for the whole organization.

3. Do not lose sight of what is working.

Identify strengths (and what is needed to sustain impactful work). DEI work should not cost organizations what they are already doing well and contributing to their communities. Recommendations in this project work to elevate and deepen strengths so that DEI strategies are authentic and sustainable.

For example, each step in this project has a blend of things to start/change and sustain.

4. Do hard things.

Entrepreneurs in this study shared that they expect the organizations that serve them to do the hard work of learning, adapting, and growing. Entrepreneurs want to see the actions and commitments behind the words. No excuses. No short-cuts. As such, at the direction of both WeBC and the entrepreneurs they are accountable to, recommendations from this project are challenging.

They require us to examine biases, unlearn harmful practices or assumptions, make big decisions, and commit to changes. And, by demonstrating commitment to working hard, making mistakes, and keeping at it, organizations can earn, sustain, and restore trust within their communities. In our case, entrepreneurs who were previously skeptical of, or resentful toward, WeBC for past mistakes were drawn back in and cautiously optimistic because of this DEI study and our commitment to acting on feedback.



Last Thoughts

There are no shortcuts to ensuring that organizations become more diverse, inclusive, and equitable. Meaningful and enduring DEI work requires relationships, resources, and tangible commitments. We hope this case study helps your organization on its own DEI journey. As there is no "one right way" to do DEI, the lessons learned, and ideas shared are examples of what worked for us.

Rather than serve as a roadmap or template for other organizations, it is the hope that the examples and considerations included here help to spark ideas and critical thinking for other organizations.

Similarly, as we opted to share learning from this DEI work at a time when organizations face increasing pressure to conceal or stop social justice efforts, it is the hope that other organizations use this case study as an invitation to opt-in, share their learning, and support collective action and responsibility for change.



Notes

Do you have some thoughts about what we have shared? Write them down!				



Appendix A:

WeBC's Roadmap Towards Increased Inclusion

The following recommendations were developed from the study.

This section shares how we are working through each of the steps outlined below as we put our learnings into action.



Mandate

1. Because the data strongly pointed to a lack of clarity in our mandate to serve gender-diverse entrepreneurs, we started with clarifying our mandate before acting on subsequent recommendations to ensure cohesion and avoid re-doing work.

Revisit the organization's mandate to clarify or adapt definitions of gender to ensure that either (a) there is a gender-expansive definition of WeBC entrepreneurs that explicitly includes trans women, non-binary, and gender-diverse entrepreneurs, or (b) there is a clearly defined limit to inclusion based on gender.

- We decided to support gender-diverse folks and therefore will need to decide what
 gender-inclusive language is most meaningful, appropriate, and accurate to represent
 entrepreneurs who will benefit from our services (e.g., should we use the language of
 non-binary, gender-diverse, gender-inclusive, Two-Spirit (specifically for Indigenous
 folks), gender-expansive, agender, gender-fluid, gender-queer, etc.)
- Make the results of this decision public so it is clear internally (e.g., staff, board, volunteers, speakers) and to external communities (i.e., entrepreneurs and ecosystem partners).
- Consider including a timeline to review the mandate to continue adapting definitions of gender as language and contexts evolve.

Focal Point

2. Ahead of designing a DEI plan (and stemming from the updated mandate), identify a focal point for our learning and growth to ensure that it is clear which group or groups of entrepreneurs we will intentionally work to support and mitigate systemic barriers for in the upcoming plan. This is the first of many plans that align with organizational strategic direction. An initial priority is just a starting point to make this work feasible; it does not exclude or come at the expense of future priorities and groups.

DEI Learning Plan

- 3. Aligning with the mandate and focal point, develop a clear and cohesive DEI strategy and corresponding implementation plan that:
 - Defines what DEI means in the context of WeBC (i.e., what do these buzzwords mean specifically to us within the context of the DEI strategy)
 - Articulates SMART goals (i.e., what specifically we want to see happen because of this plan, in what timeframe, and relative to what in the strategic direction)
 - For each department or service area
 - Define SMART goals that align with key departmental milestones (e.g., what can be done this year and what is expected to be done by the end of the DEI strategy)
 - Create policies, processes, and/or tasks that will be used to achieve these goals
 - Outline both (a) expectations for staff in the department to carry out this work to achieve goals and (b) resources or supports available to them to complete this work
 - Identify metrics that demonstrate progress toward each goal
 - Develop a timeline to show the rollout of new initiatives
 - Decides how we will prevent and address instances of intended harm stemming from discrimination, unexamined biases, and exclusion for:
 - Volunteers, facilitators, mentors, ambassadors, and anyone else who represents us (e.g., how will they be expected to work toward the goals of this plan and be supported to learn and adapt? What supports are available to them to do this work? What are the consequences for not upholding expectations?)
 - Entrepreneurs who engage with us (e.g., how will they be expected to behave toward each other and to staff? How will those expectations be communicated so entrepreneurs understand their responsibilities in maintaining safe and inclusive environments? What (if any) are the consequences for behaving in a way that causes harm?)

DEI Learning Plan (continued)

- Identifies resources to ensure this work can be done well (e.g., allot a budget, protect time for folks involved, and identify if additional expertise is required)
 - Continue to build and strengthen relationships within the ecosystem to support resource-sharing (i.e., can we offer learning from this work to partners and can partners provide in-kind resources or advice to better serve priority entrepreneurs) and alignment in efforts to address inequities (i.e., who else is doing this work, how can our DEI plan support mutually beneficial outcomes for priority entrepreneurs)
- Names a champion or working group to hold us accountable for the plan
- Identifies overall indicators for the plan that demonstrate what progress is being made when (and if strategies do not work, how will we know to pivot and try something else)

Staff Support

- **4.** To address unconscious and unmitigated biases by staff (e.g., misconceptions, stereotypes, microaggressions):
 - Clarify expectations for staff to represent our stance and values so staff understand what is being asked of them
 - Identify possible supports and learning opportunities for staff by:
 - Prioritizing training opportunities that align with the focal point and DEI plan
 - Compiling relevant "go-to" resources for staff so there is a consistent source of information for quick guides or frequently asked questions
 - Creating a communication guide that demonstrates how to use new or ever-shifting language in marketing, education, programs, and administrative documents
 - Continue dedicating time for staff to ask questions, share concerns, and problemsolve together to normalize the expectation that staff may have unaddressed biases and that WeBC will provide support for (un)learning
 - Create a safe channel for staff, entrepreneurs, and volunteers to communicate
 emergent issues regarding concerns or experiences of harm or discrimination without
 fear of retaliation. Routinely investigate if this channel is working (i.e., if no one raises
 issues, is this because there are no issues or because no one feels safe to share
 concerns?)

Staff Support (continued)

- 5. Revisit hiring policies, strategies or pathways to promotion, board service policies, and leadership succession plans to explore opportunities for more meaningful representation of priority entrepreneurs (especially gender-diverse entrepreneurs, entrepreneurs with disabilities/who are disabled, and entrepreneurs of colour and/or who are Indigenous):
 - At recruitment and hiring stages (i.e., who do we attract? Are there opportunities for everyone in our community to volunteer and work at WeBC?)
 - At retention and promotion stages (i.e., how are we committed to the success of employees, especially those from marginalized or minoritized groups? What supports and strategies are in place to mitigate risks of tokenism, glass cliff, or bottlenecking effects?)
 - At leadership levels (i.e., how are we committed to ensuring that folks in decision-making spaces represent the best interests of communities intended to benefit from the DEI strategy? How will we ensure that as current leaders step back, retire, or finish their board tenures, space (and support) is available to new leaders from groups that have been/continue to be underrepresented by us?)

Data & Evaluation

- **6.** Aligning with the DEI strategy, revisit data practices to ensure that:
 - Data collection aligns with DEI goals (i.e., how will data collected be used to make or understand progress toward goals) and not just serve funder requirements alone
 - Strategies exist to mitigate unintended harms such as onerous or burdensome data collection, unclear consent, data waste, or problematic demographic language/boxes
 - There are meaningful opportunities for the community to offer feedback to support learning and growth
 - There is adequate budget, time and resources to
 - Collect and use high-quality data
 - Maintain a database
 - Adapt data collection, cleaning, and use strategies over time to maintain relevance and mitigate data waste

Sustaining Impactful Work

- 8. Continue working to reduce barriers to accessing capital internally (i.e., WeBC loans) and externally (i.e., advocating for inclusive products and policies at financial institutions) to increase the likelihood that women and non-binary/gender diverse entrepreneurs will apply and qualify for loans or lines of credit as needed.
- **9.** Continue offering programs and services that engage diverse entrepreneurs and align with their priorities. By regularly evaluating programs, to gain meaningful insights into entrepreneurs' shifting priorities and needs over time. This study demonstrated that right now, priority entrepreneurs are most interested in:
 - Low-barrier or free programs
 - Programs that makes diverse entrepreneurs feel validated in their participation





SUPPORTING WOMEN ENTREPRENEURS IN BC WeBC is funded by



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