



**The Journey ~
Annual Report 2023-2024:
Serving Communities,
Clients, and Partners in
Innovative Ways**

June 26, 2024



Indigenous Works

TABLE OF CONTENTS

Executive Highlights 3

Employer Partner Program Update 4

Advisory Services5

Introducing a New Indigenous Skills and Development Fund 6

Celebrating Indigenous Works' 25th Anniversary.....7

Luminary 8

Other Achievements 10

Board Strategy and Governance.....11

Board Members12

Staff Members13



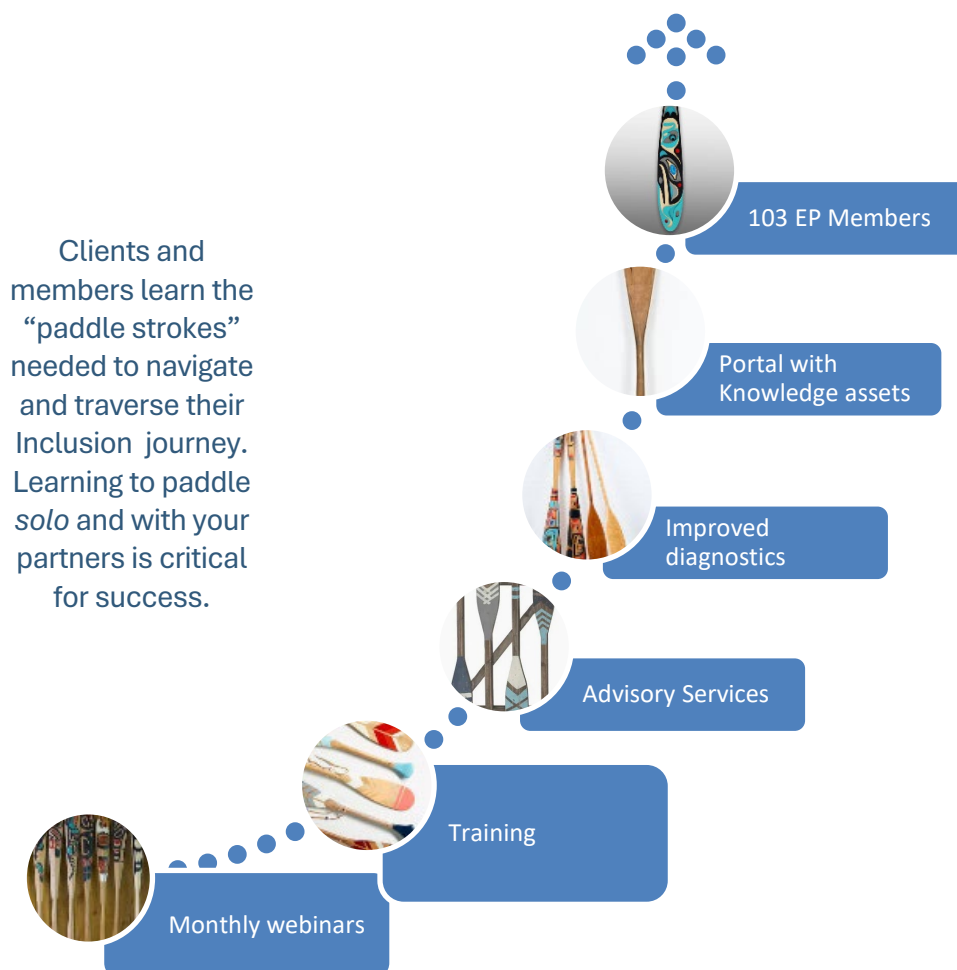
EXECUTIVE HIGHLIGHTS

As it celebrates its 25th anniversary in 2024/25 Indigenous Works is on the crest of some exciting new developments that will appeal to and create value for the communities, clients, and partners we serve. In the current 23/24 year, the foundations were laid for new service and program innovations.

- Our Employer partners now have available more webinars, and new training and briefing materials about Indigenous employment and workplace inclusion which are available through a members-only service portal. We reframed our service offer around more robust assessments and diagnostics, customized training and learning supports, and the client *journey* to inclusion, stronger Indigenous/non-Indigenous relationships and reconciliation.
- Luminary was announced as one of 24 organizations to be awarded funding from the Strategic Science Fund (SSF) Competition at Innovation, Science and Economic Development (ISED). These \$4M seed funds for 2024-2029 are strategic for the heavy lifting ahead. Luminary's plan is also to generate additional funds from the private sector, academic sector, foundations, and other public partners. The idea of Luminary is to bring an institutional and programmatic agenda to advance and shape an Indigenous innovation eco-system agenda and a grassroots and partnership-based strategy. Luminary projects were undertaken throughout 23/24.
- Indigenous Works and Elomatic, a Finnish company with offices in Canada, introduced a new initiative aimed at building capacity with Indigenous companies, organizations and peoples, to help – among other benefits – access employment, supplier contracts and participation in Canada's defence and security industries. With an initial \$100,000 donation by Elomatic, the fund will be marketed to Industrial and Technological Benefits companies that have contract obligations under Canada's Industrial and Technological Benefits Policy. Indigenous Works fund has a target of \$1m per year.
- Indigenous Works has further grown its advisory services and there are opportunities to expand into new areas with companies, government, and NGO organizations. Advisory services provide opportunities to work with organizations in intensive ways on policy and strategy issues. In the past year, Indigenous Works has taken on a select number of new clients, and this has resulted in deep learning and solutions in employment and workplace inclusion issues. In addition to its "light advisory services, Indigenous Works offers employment systems reviews, and barometer studies which are just two examples of the service specialization we offer.
- Indigenous Works is positioned for further growth in 24/25 as a result of the project and program innovations initiated and introduced this year. The Board of Directors has undertaken significant planning in the current year to enable the orderly growth of the organization.

In 2023-2024 the Employer Partner Program grew by deepening its learning resources, knowledge assets and client care approaches.

- More frequent contact and support for employer partners.
- Employer Partner Member Portal houses extensive archives: monthly webinar recordings and materials, 30 new tip sheets and information bulletins and other knowledge assets.
- Increased training (standardized for Masters, Intermediate and Newcomer levels)
- Customized training (in-person or on-line)
- Increased audience and participation in monthly webinars.
- Increased usage of job board facilities.
- Employer partners at 103 members on March 31, 2024 - *steady growth*.



Indigenous Works grew its advisory services. Our client included names such as the Canadian Mental Health Association - Durham, Edwards School of Business, IGM Financial Inc., Dalhousie University, Canadian Energy Pipeline Association (CEPA) Foundation, Alberta Engineering and the Association of Professional Engineers and Geoscientists of Alberta are further examples of projects undertaken this year.

This year we adopted product delineations in our marketing of “Light and Full Advisory Services”. Our Light Advisory services are differentiated for their lower price points (under 15K) and the fact that they are conducted using “production writers” for routine topics such as land acknowledgements, diagnostic and certification exercises, and editorial reviews of Reconciliation Action Plans. In contrast, our full-service advisory offers are usually driven by an invitation, an RFP and a proposal, followed by a contracted statement of work.

It is noteworthy that Indigenous Works took on some of its larger client contracts for a longer period of time (up to 1-2 years) to allow these organizations the opportunity to make the changes needed in their larger scale operations to realize their inclusion goals. Examples include Business Development Bank of Canada and Home Depot.

One advisory services contract area where we have made headway is with the federal government undertaking policy work in areas of First Nations reform. Last year we undertook work in housing. This year our advisory services focused on organizational planning for a specific claims centre. The federal government’s reform agenda will continue to be a growth area for the kind of policy and strategy consulting where Indigenous Works can offer niche services.

A second area of growth is with the education market. Many post-secondary institutions have need of Diversity, Equity, and Inclusion Planning. The education market offers an intersection between the HR and workplace inclusion work traditionally done by Indigenous Works and the new work and networks which Luminary is trailblazing.

Some of Indigenous services could be digitized in the future and we began to explore this work in 2023/24. A place to consider a digital pilot is with our certification program which currently falls under our light consulting category. We will be reporting on this next year. Indigenous Works is also experimenting with AI in some of its routine research work for its advisory services. Our policy is to divulge this use in our fulfillment of our contract work.

Advisory services will continue to be a way for Indigenous Works to grow its revenues and its intellectual property. We can expand and contract our expenses as the contract pipeline ebbs and flows and this service line therefore offers a relatively risk-free growth plan.

INTRODUCING A NEW INDIGENOUS SKILLS DEVELOPMENT AND TRAINING (ISDT) FUND ELIGIBLE UNDER THE INDUSTRIAL AND TECHNOLOGY BENEFITS POLICY

In 2023/24 Indigenous Works introduced a new initiative aimed at building capacity with Indigenous companies, organizations and peoples, to help, among other benefits, access employment, supplier contracts and participation in Canada's defence and security industries. The ISDT Fund will appeal to defence companies that have obligations to spend a portion of their Canadian government contract funds in Canada, and with Indigenous peoples.

The new fund is eligible under the government's Industrial and Technology Benefits/Industrial Regional Benefits Policy. Contributions to the ISDT Fund by "obligor contracting companies" means they will receive credit from the government for their, Canadian Content Value (CCV) expenditures thus helping these companies meet their obligations. Contributions will receive a CCV factor: 1x on donations and 4x on the funds being disbursed. This structuring incentivizes companies to give to our ISDT Fund because of the accelerated reduction of their Canadian content obligations.

The ISDT Fund was launched with an initial \$100,000 donation by Elomatic, a Finnish company. Other IRB and ITB obligors are now invited to participate in the fund. Indigenous Works has set an initial target of \$1m commencing 24/25. The fund is divided into three tranches, as follows:



- Tranche A will support Indigenous Works' own skills development and training programs.
- Tranche B will fund a series of small grants (c. \$20,000 to \$25,000) that will be distributed through periodic calls for proposals from eligible recipients.
- Tranche C will support a small number of larger grants that will be the subject of invited proposals. Donors to the fund will be able to nominate organizations to receive invitations to submit proposals for these larger grants.

Grant recipients will mostly be majority-Indigenous controlled organizations that conduct existing or wish to commence new skills development at training programs or initiatives. Recipients may include non-Indigenous organizations provided that the program or initiative that is to be supported meets the definition of Skills Development and Training for Indigenous Peoples.

Elomatic is a multi-national international engineering services company headquartered in Finland, with over 50 years of shipbuilding and design expertise, and is currently engaged as a Tier-1 subcontractor to Seaspan under the National Shipbuilding Strategy. Its Canadian office, in North Vancouver, BC, opened in 2022 and is expanding rapidly.

Celebrating Indigenous Works 25th Anniversary

Indigenous Works will be celebrating its 25th anniversary at Inclusion Works '24 which will be held Oct 8 to 10, 2024, in Nanaimo, BC. The theme of this year's learning event in October is "*Going Beyond the Checkmark.*" The Inclusion Works' program will be showcasing and sharing strategies and practices among private, public, and Indigenous organizations. It will provide deeper management learning, ideas, and strategies to ensure employers are going beyond the checkmark. It will be an opportunity to bring together people from across Canada to engage in deep management and executive learning and to celebrate Indigenous Works' achievements over the past 25 years.

In preparation for Inclusion Works and Indigenous Works' 25th Anniversary, a variety of plans were developed and implemented in fiscal 23/24 to promote, socialize, and market this event.



- ⇒ Event promotion has been underway with a series of video clips promoted and disseminated through social media by influencers. A top ten “countdown” campaign to Inclusion Works was planned and will be implemented summer 2024.
- ⇒ A strong learning program at Inclusion Works was organized premised on and emphasizing what non-Indigenous organizations should be doing to learn more about Indigenous people and their communities, and to prepare themselves and their organization for “a new era in Indigenous inclusion”. Strategic partnerships with channel organizations like the Chartered Professionals in Human Resources, BC are promoting the value of the event for human resource personnel and their professional development.
- ⇒ Indigenous Works reached out to over 300 former grads that participated in the 2009-2014 recruitment fairs. This cohort has been contacted to engage their participation in and promotion of the event. We are also exploring a possible research project which follows their career from graduation to their current status as mid-career professionals. Some of these grads will also be featured in a 25th anniversary video being produced about Indigenous Works, its past work and goals for the future.

These promotional and marketing activities will help build interest in Indigenous Works 25th anniversary, the Inclusion Works event in October 2024 event, and our organizational goal to attract current and new Employer Partner program members. The story line we are underscoring in our promotions and communications emphasizes the longevity of the Indigenous Works organization, the reputational value it has developed, and its continued operation in the future as a valued partner and “go to” in the Indigenous labour market ecosystem as a source of information and training for a new era of inclusion.

LUMINARY

Indigenous Works established Luminary in 2019 to identify ways to grow Indigenous-led research partnerships and to encourage use of research information as a catalyst to new product/service innovations and value creation leading to increases in Indigenous employment, business/economic development and wellbeing.



By way of background, it will be noted that throughout 2020 and 2021, 150+ Luminary Charter Partners from business schools, post-secondary institutions, Indigenous business community, industry and NGOs co-created the Luminary Strategy identifying eight program streams to address barriers and gaps, build new systems, and contribute to the re-design of the Indigenous research and innovation ecosystem.

Over the last three years 2021-2024, Luminary has leveraged just over \$1M in project funding including support from INTACT, Protein Industry Council, Nutrien, Kocihta, and other partners to build Luminary's capacity and undertake projects which advanced Luminary's mandate. Notably, it conducted projects to examine Indigenous Agri-Food business innovation. Also, sharing circles were organized to better understand Indigenous PhD and Masters students' experiences at post-secondary institutions and how the research and innovation ecosystem could be enhanced.

In 2023/24 Luminary approached the McConnell Foundation and received 465K approval for a new innovation project "Building an Indigenous Seaweed Industry for Canada". The funds are being used to develop policy papers which identify Indigenous principles and conditions for industry growth as well as a 10-year industry plan. An application was also developed for the Oceans Supercluster for funds to encourage Indigenous/non-Indigenous business partnerships in this growing \$17 Billion global industry. Luminary wants to explore Indigenous research and innovation opportunities in strategic sectors of the economy which will stimulate community-based economies and Indigenous engagement and participation in the Canadian economy.

In 2023/24 a contract with several universities led by Dalhousie explored Indigenous opportunities to expand the Lab2Market program. As part of this project, a forum was held with the First Nations University of Canada to examine how best to operationalize the 'Lab2Market' concept in Indigenous communities. Indigenous engagement workshops were also held at Thompson Rivers University, Edwards Business School, Dalhousie, Carleton, and Southern Alberta Institute of Technology which also collectively explored themes pertaining to the growth of a more collaborative Indigenous research and innovation ecosystem.

In December 2023 Luminary received the results of a funding submission it made two years earlier to the federal government. The Luminary initiative is one of only 24 organizations in Canada, and the only Indigenous organization in Canada, to be awarded a five-year funding commitment (2024-2029) through Innovation, Science and Economic Development's (ISED's) new Strategic Science Fund. The \$4 Million funds over the life of the initiative will provide Luminary the opportunity to hire a core team of specialists that will focus on developing stronger ties between Canada's business schools and the Indigenous business community. Luminary's team leader will be given the title of Executive Director which is part of the governance discussions held by Board members about Indigenous Works Organization Inc. which follows in a later section of this Annual Report.

In 2023/24, in anticipation of this program focus, Luminary worked with colleges, universities, and Indigenous organizations to design a "National Survey of Canada's Business Schools' Indigenous Engagements". This survey is the first of its kind and will yield baseline data revealing the status and depth of many engagement touchpoints including development of Indigenous business curricula, Indigenous student enrollment, Indigenous research collaborations, and much more. The data will provide critical planning information for Luminary. Toward the end of its 5-year program funding Luminary will do a second survey of business schools to assess changes and progress in Indigenous engagement.

To date, Luminary has established an impressive network of organizations working in and with Indigenous communities, post-secondary research communities, NGO, government and business communities. Canada is struggling on innovation. An indication of Canada's lag in the innovation space can be measured by the lack of patents. Compared with other countries, Canada's patent pipeline has fallen behind. Moreover, Government innovation strategies "have typically failed to leverage the country's brains to produce economic growth."* This sentiment is echoed by other people and organizations. "Canada has lost its way regarding innovation. Our nation scores a C on The Conference Board of Canada's Innovation Report Card ranking 15th among twenty countries. Of the twenty-one innovation indicators, Canada scores below average on fourteen of the indicators.**

Luminary believes that Indigenous research and innovation has the potential to ignite Canada's economy and help the country improve its position on innovation. The foundations created in 2023/24 now enable Luminary to deliver its exciting program and strategy. Luminary's plan is to leverage its core government funding to develop a vital initiative that is sustainable and further attracting of larger scales of public-private investment.

*Sean Silcoff and Josh O'Kane, "Canada has leading AI experts. But does Ottawa have the right plan to support an AI industry?" Globe and Mail January 23, 2023.

**"2024 Innovation Report Card: Benchmarking Canada's Innovation Performance." Conference Board of Canada, 2024.

Keith Willoughby, Dean at the Edwards School of Business and President Peter Stoicheff, President of the University of Saskatchewan, have underscored the important gap that Luminary is addressing: “USask and Edwards see the unique value that Luminary will bring as a catalyst and connector. It will have an enormous multiplier effect that will increase and accelerate research and innovation activity with Indigenous businesses and community owned economic development organizations in our institution and institutions in Canada, Australia, USA, and New Zealand.”

From This...



To This.



OTHER ACHIEVEMENTS DURING 2023/24

Effective Promotion through Speaking Engagements and Social Media Reach

- 53 engagements over the course of the year

1. LinkedIn: 43,758 reach
2. Facebook: 8,117 followers
3. Twitter: 1,414 followers
4. YouTube: 7,830 views

Administrative Excellence

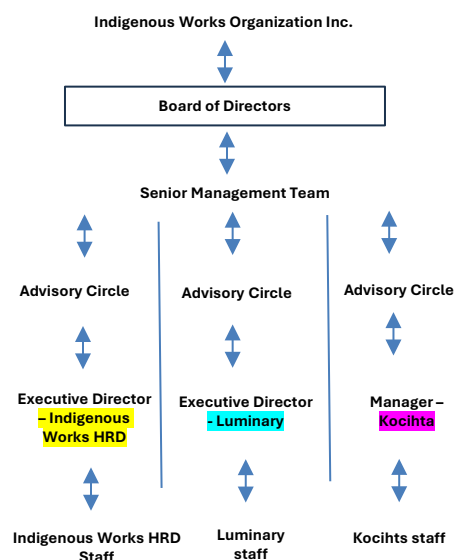
- Continued excellence in finance and administration
- Increased client and partner reach
- Improved reach through increased marketing, communications and presentations
- Effective board of directors' performance and governance planning
- New product and program development
- Strong financial stewardship and orderly financial audit
- Annual ISO re-certification approved
- Continued promotion and social media presence

Board Strategy and Governance

In anticipation and in effort to guide Indigenous Works' growth and expansion, the Board of Directors undertook planning initiatives in 2023/24 which will continue into next year.

In December 2023, the Board hired Linda Doxtater to facilitate a strategy session held in Ottawa. These discussions began the process of framing the next stages of evolution for "Indigenous Works Organization Inc.", the corporate body which governs the work of Indigenous Works (Indigenous Works HRD) and

its focus on Indigenous human resource development and workplace inclusion. This will now be coupled with the new program embodied and led by Luminary focused on Indigenous research and innovation. The mandate of Indigenous Works Organization Inc "to increase Indigenous engagement and participation in the Canadian economy" does not change, but the combined program and project thrusts in human resources, workplace inclusion, research and innovation now require more complex strategies and revised governance arrangements to enable the success of these agendas.



Senior management and Co-chairs held further discussions about these governance matters later in March and in-person in May 2024. These discussions have helped crystallize organizational governance options which will be shared with the board in September and later refined at a subsequent board meeting. These discussions are also looking at future management and board needs for Indigenous Works Organization Inc. On the management side, the two main issues have to do with succession planning and the delineation of management roles needed to achieve the growing work envisioned under Indigenous Works HRD and Luminary.

The start-up of Luminary SSF funding in April 2024 paved the way for a recruitment action to hire an Executive Director for Luminary which will be followed by additional staffing in summer and fall. A second Executive Director will be hired for Indigenous Works HRD later in the 24/25 fiscal year. These discussions and personnel additions will help smooth the growth of the organization and ensure that it is conducted in a measured and orderly way.

BOARD MEMBERS

During Fiscal 2023-2024 the following served on Indigenous Works' Board of Directors.

- Pat Baxter (Co-chair), Consultant
- Stephen Lindley (Co-chair), Consultant
- Ken Bell, Vice President, Strategic Planning, Syncrude
- Jonathan Davey, National Director Aboriginal Financial Services, Scotiabank
- Kelly Lendsay, President & CEO, Indigenous Works
- Shawn MacDonald, RBC Financial Group
- Candice Metallic, Principal, Metallic Law
- Jesse Perley, Director First Nations Affairs/Indigenous Relations
- Shaun Soonias, Vice President, Indigenous Relations, Farm Credit Canada

It is with deep regret that Indigenous Works again acknowledges the passing on October 30, 2023, of its dear friend and board member Trevor Ives, CEO, Peter Ballantyne Group of Companies. Trevor will long be remembered for his service to Indigenous Works, his friendly and easy manner, and his dedication to excellence.



STAFF MEMBERS

Subash Biswal, CPA, CGA - Chief Financial and Business Development Officer

Craig Hall, MBA - Senior Vice President - Strategy and Innovation

Nicole Huska, BA - Senior Consultant Training and Advisory

Kelly Lendsay, MBA, ICD.D - President and CEO

Terra Kerani MacPhail - Director of Sales, Marketing and Partnerships

Adam Poitras - Web and IT Manager

Rudy Rehn - Project Accountant

Paula Sawyer - Administration Coordinator

Michael Stushnoff - Sales Consultant - Employer Partner Program

