



THE UNIVERSITY OF BRITISH COLUMBIA

**Canadian Institute for Inclusion and Citizenship**

# **NEW INCLUSIVE ECONOMY CASE STUDY FINAL REPORT**

December 12, 2023

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## INTRODUCTION

Following the earlier phases of this project; literature review, environmental scan, interviews, and focus groups; phase three (“*where do we want to go?*”) involved in-depth case studies conducted by the UBC Canadian Institute for Inclusion and Citizenship research team in partnership with Regenerem Consulting. This phase sought to explore three main areas of inquiry: 1) What are the enabling conditions that exist within the workplace (i.e. accessible building, living wage, task modification), 2) How does the workplace respond to structural barriers that exist beyond its walls/culture (i.e. located on a bus route, flexible schedule, training managers about inclusion and nonviolent communication, actively fostering natural supports, business model, guiding values, internal workplace policies), and 3) What enabling structures are embedded in the workplace (i.e. stable baseline funding, political priorities at a government level, organizational partnerships, community support, economic context, cultural norms)?

The prior stages of this project supported the identification of several case examples of models of inclusive employment practices across B.C. Case study was used to examine these models in more depth and identify structural conditions and employment practices that promote meaningful employment opportunities for people with disabilities. Case study has a long and rich tradition within qualitative methods, focused on allowing researchers to take an in-depth look at a particular circumstance, drawing out detailed and holistic understandings from small sample size (Tight, 2017). Ethical approval for this phase of the project was obtained from the UBC Research Ethics Board. An external review was completed by the British Columbia Ministry of Post-Secondary Education and Future Skills.

## CASE STUDY SELECTION

Recruitment for case studies was done using a purposive sampling approach and included only participants who had responded to the previous environmental scan who had indicated consent to participate in later phases of the project. Potential cases were identified and discussed with the broader project team members and included all types of organizations/businesses who employ (including self-employ) persons with disabilities in British Columbia as permanent/regular paid employees regardless of size, economic/business model, profitability or sector. Diversity across demographics (i.e. sector, size, business model, disability status of employees, etc..) was prioritized and potential cases were excluded if they were not identified as inclusive employers in the environmental scan, and/or if persons with disabilities were only in volunteer, training, or fully subsidized employment roles.

<b>CASE STUDY</b>	<b>In which region of British Columbia does your business/organization primarily operate? Please select all that apply</b>	<b>Which sector of the labour market best represents your business/organization? Please select all that apply. - Selected Choice</b>	<b>What type of structure best describes your business/organization ? Please select all that apply. - Selected Choice</b>	<b>How many total full-time and part-time employees (permanent or contract) does your business/organization employ?</b>
<b>Solopreneurs</b>	Across Canada (including British Columbia)	Educational/ Professional Services	For-profit	1 (self-employed)
<b>Joni</b>	Across Canada (including British Columbia)	Retail	For-profit, social enterprise	5 - 9 people
<b>Alinker</b>	Across Canada (including British Columbia)	Healthcare/ Retail	For-profit	10 - 19 people
<b>Northern Lights</b>	Across Canada (including British Columbia)	Agriculture, Retail	For-profit	30 (off-season) to 100
<b>ILV</b>	Okanagan	Social Services	Non-profit	5 - 9 people
<b>One Light</b>	Vancouver Island	Manufacturing, Retail	Social Enterprise	5 - 9 people

<b>CASE STUDY</b>	<b>Does your business/organization offer any profit-sharing or shared ownership options with employees (for example bonuses, stock options, RRSP matching)?</b>	<b>Is your business/organization owned or led by an Indigenous, First Nations, Inuit, or Metis person?</b>	<b>Is your business/organization owned or led by someone with a disability or who identifies as disabled?</b>
<b>Solopreneurs</b>	N/A	No	Yes
<b>Joni</b>	Yes	No	No
<b>Alinker</b>	Yes	No	Yes
<b>Northern Lights</b>	No	No	No
<b>ILV</b>	No	Yes	Yes
<b>One Light</b>	No	No	I do not know

<b>CASE STUDY</b>	<b>Are there individuals with disabilities in leadership positions within your business/organization?</b>	<b>To the best of your knowledge, what percentage of your workforce has a known disability or identify as disabled?</b>	<b>Does your business/organization have a formal diversity declaration? (for example a written Diversity, Equity, and Inclusion (DEI) statement?)</b>	<b>Does your business/organization intentionally recruit and hire people with disabilities or who identify as disabled?</b>
<b>Solopreneurs</b>	Yes	100%	N/A	N/A
<b>Joni</b>	No	25-49%	Yes, and it is shared internally AND posted/shared publicly	Yes
<b>Alinker</b>	Yes	25-49%	Yes, it is shared internally	No
<b>Northern Lights</b>	No	5-10%	Yes, it is shared internally	Yes
<b>ILV</b>	Yes	75 - 100%	Yes, it is shared internally	Yes
<b>One Light</b>	I do not know	50-74%	Yes, and it is shared internally AND posted/shared publicly	Yes

<b>CASE STUDY</b>	<b>Does your business/organization use disability- friendly recruitment and hiring processes?</b>	<b>Is disability inclusion central to your business/organization al mission?</b>	<b>Does your business/organization partner with local disability organizations/agencies to support the hiring and/or retention of disabled employees?</b>	<b>Does your business/organization receive subsidies or funding to hire and/or retain disabled employees?</b>
<b>Solopreneurs</b>	N/A	Yes, definitely	N/A	N/A
<b>Joni</b>	yes, definitely	Yes, definitely	Yes, we partner with one disability organization	Yes
<b>Alinker</b>	Yes, definitely	Yes, definitely	Yes, we partner with several disability organizations	No
<b>Northern Lights</b>	Yes, through disability support organization	No	Yes	No
<b>ILV</b>	Yes, definitely	Yes, definitely	No	No
<b>One Light</b>	Yes, definitely	Yes, definitely	Yes, we partner with several disability organizations	Yes

## PROCEDURES

Data was collected from multiple sources, including publicly available information about the organization, internal document review, observation and interviews with key informants (over the age of 18) including employees, founders, leadership, and solopreneurs.

Interview participants were invited to share some demographic information about themselves as well as the business/organization that they were being invited to share about. A semi-structured interview guide was developed by the research team to invite participants to share more qualitatively their experiences with employment and inclusion, including the influence of values, policies and practices on inclusive employment. See Appendix A for the semi-structured interview guide.

All interview participants completed informed consent forms and were advised that all the data would be shared in connection with the name of their business/organization, including solopreneurs who would be personally identified through the dissemination of data. Informed consent procedures were conducted before all internal document review and interviews. Interview participants were informed they could opt out of answering any questions, could end the interview at any time, and could request their data not be included in the overall findings; at no consequence to them. An honorarium of \$100 was offered to all participants who agreed to be interviewed.

All interviews were conducted by two research team members and were audio recorded and transcribed verbatim. When data collection was completed, raw data (audio recording and transcription) was downloaded and stored by the UBC team on an encrypted and secure folder. The raw data will be saved for a minimum of 5 years post-publication as required by UBC Ethics.

For this project, analysis was conducted with a translational goal in mind, meaning rather than a traditional qualitative case study approach that offers a deep and individualized exploration of a phenomenon; we sought to highlight patterns across practices and process to develop a thematic consensus that can be used to directly inform consideration and development of best practice initiatives. Data analysis was iterative and emerging themes/points of connection were discussed among team members in an attempt to reduce individual researcher bias.

## THE CASE STUDIES

The case studies involved in this study represented a diverse range of businesses/organizations and approaches. Three are small for-profit businesses with strong social purpose commitments (Alinker, Joni, Northern Lights Estate Winery {NLEW}). One is a disability related non-profit (Independent Living Vernon {ILV}). One is an initiative of a disability support agency specifically designed to create employment for disabled persons<sup>1</sup> and other marginalized populations (One Light), and one case study comprised two disabled solopreneurs who were also representing for-profit businesses with strong social purpose commitments. Some were specifically developed as disability inclusive employment vehicles (One Light), others included inclusive hiring as part of their broader commitments to inclusivity and social purpose (NLEW, Joni, Alinker, ILV). Two case studies reflected an approach where hiring disabled people reflected the knowledge they brought to the work which non-disabled employees may not have (Independent Living Vernon, Alinker). The solopreneurs represent a further variation where self-employment is the vehicle to achieve working conditions that suit their needs as disabled persons and are often hard to achieve in the general employment landscape, conditions though that are also present in many ways with the other case studies. Finally, three represented for profit entities (Alinker, Joni, NLEW) as did the solopreneurs.

The case studies also represented a broad range of disabled persons; including people with physical, cognitive, learning, mental health disabilities and neurodivergence. Some participants in the case studies had a single disability type (NLEW, ILV, Alinker), some mixed (Joni, One Light). Some case studies had a majority of workers with disabilities or other employment challenges (One Light, ILV) while others had a minority of disabled employees (Joni, Alinker, NLEW).

Despite this broad diversity of employment settings and approaches, several common themes emerged as to what makes them effective inclusive employers.

Please see the case study summaries in Appendix B.

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<sup>1</sup> This report uses both 'identity first' language as in 'disabled person' and person first language as in 'person with a disability' to reflect the different preference of the various participants.



## FINDINGS

### Culture, Values and Commitment

A common feature of all of the case studies was a shared set of values and a culture of inclusion. This was true both for those businesses/organizations which had a specific commitment to disability (ILV, One Light), the solopreneurs, and the for-profit enterprises (Joni, Alinker, NLEW).

Often this was a broader commitment than disability inclusion encompassing values such as sustainability and gender equality. Joni for example does not specifically identify disability inclusion but the broader values of the company naturally incorporate this in a culture which is committed to its mission of period care equity, support for women investors and, ethical and sustainable product components and production. Joni Participant 4 shares, *“something else that we're very excited about is, um, we're starting to create our application to become a B Corp<sup>2</sup> company. Um, and so, that's something again solidifies our commitment to people, the environment, and then profits. And I would honestly say that it's in that order. Um, uh, we're a business, so being profitable and, and again, paying our, you know, employees for their services is important, but not more important than the, the greater mission that we serve.”* Through its “essence statement<sup>3</sup>,” Alinker supports and promotes the work of reconciliations with Indigenous people and support for Indigenous women entrepreneurs and has obtained B Corp status demonstrating this broader social purpose and commitment orientation.

One Light, which has a specific mission of inclusive employment, is also committed to sustainable and ethically sourced material and production. NLEW was to a large extent a business developed specifically to give back to the community and inclusive employment flows from this broader commitment.

ILV Participant 1 explained, *“I've been really trying to work on, you know, ensuring that that we're not just focused on disability, either. Right? That we're focused on people as like as people. You know all the parts of who they are that come along with them right?”*

Both solopreneurs ran businesses that purposely sought to meet the needs and goals of persons from marginalized populations. They both spoke about how their business practices shone a light on the broader systemic gaps and oppressive structures that impact people's disability. For example, one stated *“I work with folks who have been most impacted by patriarchy and other*

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<sup>2</sup> Designation as a B Corp means a company meets high social and environmental standards (and commits to improving their performance in those areas) in addition to pursuing financial success. The application process and designation is managed via B Lab, which assesses the company's performance on five major categories: governance, workers, community, the environment, and customers. It also looks at the overall impact. More information available from <https://www.bcorporation.net/en-us/>

<sup>3</sup> Alinker Essence Statement is found at <https://thealinkercanada.ca/pages/our-essence>

*problems of oppression. And so, you know, we're working with, you know, people that are burnt out by capitalism and then beating themselves over the c... uh, about not getting the creative practice down, and it's like, well, look at the system."*

The commitment of ownership/leadership both to inclusion and the broader social purposes noted above was a key common feature across all of the case studies. While present in all of the case studies it is particularly notable in the for-profit case studies where the social purposes were equal to or more important than making a profit. In one instance the leadership for example indicated that they would not compromise their social purpose simply to make or increase profit and had in fact turned down investors who were not willing to accept their commitment to return 5% of revenues to community organizations to promote period care equity. This privileging of social purpose over profit was a key difference between many of the case studies and traditional for-profit enterprises. While social purpose (including inclusive employment) was often prioritized this did not mean profitability was sacrificed, but that the costs associated with this were simply viewed as part of the cost of doing [good] business. This seems to be a paradigmatic feature of the new inclusive economy.

A further feature was that in most of the case studies the value base of the enterprise was up front and overt either through specific DEI (Diversity, Equity and Inclusion) statements or, more commonly, through the communication between leadership/ownership and employees or prospective employees. Some of the case studies did have formal DEI statements and while this was not directly expressed, it felt as if these were seen as redundant or unnecessary given the overall culture of the enterprise. Alinker has a robust 'essence' statement affirming its commitment to reconciliation and highlighting a culture of social commitment and purpose.

Similarly, inclusion or inclusive employment training was provided in some cases but this was generally not mandatory or consistent across the enterprise. Again, while not stated, this seemed not to be a reflection of a lack of commitment to inclusion but rather a feeling that such training was not necessary given the overall culture of the enterprise. The nature of the training was also more broadly focused on lived experience rather than inclusive employment per se. As NLEW Participant 5 notes: *"[A local autism trainer] did a, a little kind of workshop sort of with us, to try to give us an idea of what it is like to process things, and what it's like to have autism. And that was really beneficial. I, I would love it if they could come back and do that again. And I thought it was really, really great."* Instead of providing specific information on hiring and supporting autistic people, the training was focused on understanding autistic perspectives and experiences.

*Joni Participant 2: "It's you're already including people no matter what. It, it, that's what I, that's like how I saw it anyways, when I got trained onto it, it was just like, they're unapologetically, like inclusive to everyone, and it's just, this is who we are. Um, from what I, from what I'm seeing, like again, I didn't have like a, I don't see like a formal training and I, I didn't see that. I just was trained for my actual job and then was told that we have workers with disabilities*

*that you are gonna work with and, and this is how we've, and I think 'cause it is at this time, it's a small business, so it is very much like we all are talking to each other every day."*

Participant 5 further spoke about the impact Alinker's commitment to truth and reconciliation has had on her, *"It's been amazing. Um, again, I've, I've never felt so accepted for, uh, the way I think and the way I believe, um, at any place I've ever worked. Um, I've had other places where I worked where I said I was indigenous and people laughed, (laughs), or people, you know, made jokes about it. Um, you know, all those kinds of things. Um, it's always been, that's always been a struggle to, to be looked at as different and not having that identity valued. And with Alinker, it's valued. It's, it's seen as, as a positive thing, and it's seen as, um, uh, wisdom that's, that's to be shared."*

Solopreneurs also spoke about the impact of less inclusive cultures on their own sustainability as an employee and drive to turn to self-employment. For example, in speaking about their past experiences as an employee, one stated: *"I feel like I'm just starting to recognize, too, how much value to misalignment was an issue for me, that autistic and maybe neuro-atypical in general thing where we, like, feel, like, justice really strongly. Um, I really struggled with that misalignment in my corporate job. Um, and even before I kinda got radicalized, like, when I started working that job, I still was like, "Capitalism is fine, it just needs to be reformed." And I have... no, (laughs) not anymore. Uh, so getting more and more radicalized, I think, and, like, m- more and more leftist over time, I think really aggravated that and I think I can, looking back, I can recognize the toll that took on me, that dissonance, cognitive dissonance took on me, um, both in terms of, like, the work I was doing, and both what people around me were saying and doing. "*

Joni Participant 5 spoke to the impact inclusive teams and culture has had on their own job satisfaction and success, *"Like anecdotally, throughout my career, I have had more success, and have had more fulfilling roles when I work with people that bring in diverse experiences and ideas. And that could be lived experiences, that could be, you know education, that could be a whole host of things, but I find that we are... Like the fabric of the culture and the baseline of how we work becomes much stronger."*

### [Building Employment and Roles Around People's Strengths, Skills, and Needs.](#)

Across case studies, participants spoke about the value of being in a role where the responsibilities were created or adapted to align with their unique strengths, skills, and needs. This reflects in many ways a traditional customized employment approach common in disability employment, specifically in relation to individuals with intellectual disabilities and more complex needs. In our case studies this was described differently as something adopted across employee populations and tended to flow naturally within the culture of the business and was not a 'special

accommodation' for disabled employees. With the slight exception of NLEW, external customized employment agencies were not involved in any of the case studies; rather, employers and employees work through what was required in a largely organic manner. It is important to note that with these employers this applied to most if not all employees and not just disabled employees.

Alinker Participant 5 explained their experience in joining the organization: *"I had recently lost my position on my, on previous online position, and in talking <Participant 1> heard that, and she just kind of said to me, "How would you like to come work for the Alinker?" And I basically said, "What (laughs)?" And, um, she just said, "Well, you know, in talking to you, it sounds like you've got a lot of talents that we can use and, you know, I'd love to have you come on board." And I said, "Well, what would my position be?" And she basically said, "You got a lot of things we can use, we'll figure it out."*

This model of shaping a position around an employee's individual skills and strengths was adopted across all positions within Alinker. Participant 2 talked about the impact this model of employment has on the culture of the organization, *"Challenging yourself to be more aware about who you actually are... And so I think it's probably not very often that we find organizations that we want you to individually be the best version of you."*

Joni Participant 3 shares how this works for their organization, *"And then just to think of sort of each person holistically. Everybody has strengths, and everybody has things that are, they're challenged at. So creating a strength-based, um, environment, I think is the goal of any organization. And so then your focus is not on what tasks people can't do, or how this employee is failing, but what, how can we, um, leverage the strengths that each person and create an environment that's gonna optimize that. There, those are my two cents (laughs)."*

### Clear, Informal, And Regular Communication

As with the above, this was not exclusive to disabled employees but part of the broader culture of the enterprise. Most took a dialogic approach rather than a top-down approach. While the employers would set the goals and nature of the work, how this was achieved was determined more through both formal and informal discussion and dialogue between the employer and the employees. The knowledge that one could contact the people in management when required, often informally, promoted a sense of security and confidence amongst employees, disabled and non-disabled alike. Similarly, those in management positions had confidence that employees would reach out as needed and hence complex or overbearing oversight mechanisms were not required. In short, this type of employee and employer communication was not only more efficient but also instilled confidence in all members of the team, from management to employee alike. While this applied equally to disabled and non-disabled employees, for disabled employees

it likely represents a welcome break from what is frequently an experience of detailed and regular oversight and directive communication from both employers and employment support workers.

ILV Participant 3 explains, *"We feel comfortable talking to each other about what's going on. I think that makes a very big difference for our workplace compared to other workplaces. Everyone has the opportunity to share their concerns and barriers."*

Solopreneurs spoke about how they modelled this clear, informal, and regular communication with their clients and how this allowed them to show up and be present as they are in their role. For example, one solopreneur stated:

*"I'm still allowed to be seen even when I'm unwell, and there's so much about, like, having to, like, hide being unwell, um, because shamed of showing up unwell, all of those kinds of things. So, I think it's just also, like, being able to be met where you are, and to be able to, like, show up however you can show up."*

ILV Participant 2 notes, *"Things are not as black and white here. So there's room to go into like a gray area, and to go into seeing different inputs and not always the same outcomes."*

## Flexibility

Flexibility was one of the most significant and frequently cited aspects noted by virtually all case study participants as a key facilitator of inclusive employment. This had a number of different components. First was flexibility around hours of work. Having the ability to choose *when to work* allowed employees the ability to work around times when their disability, health, or other issues may need attention. Flexibility around hours of work allowed employees to have agency in determining when to work, without compromising their employment status or requiring them to seek specific accommodations or leaves, which can be stigmatizing and challenging. The solopreneurs cited flexibility as a key benefit to self-employment as they did not have to negotiate with anyone should they need to take time off for disability or related matters. For example, one solopreneur stated *"Yeah, and if I'm having a day when I really just can't focus, uh, it's fine, I don't really have to. I can just take the pressure off myself and if I get things done, great, and if I don't, I don't."*

Similarly, the *ability to take time off* when required due to health or other issues allowed employees the flexibility to continue employment while still attending to health and disability related issues. This was not unlimited and varied with the business type. One Light and NLEW were able to offer significant latitude in this respect whereas the for-profit enterprises took the view that so long as the work gets done and people keep them informed they were happy to accommodate these needs. Alinker Participant 5 shares:

*"Well, I'm working entirely remotely, so I'm working from home. So it's, it's perfect. I mean, I'm, I can be comfortable. I can be, you know, if I'm having a really bad day, I can be in my bed in my pajamas if I want to, as long as I don't have, you know, a meeting. And if I have a meeting, I, I'm only from here up, so (laughs). Um, so yeah. And, and it allows me, um, Alinker pretty much allows me to set my own schedule. So if I'm having a, a really rough day, a really high pain day, I can just say, "Hey, I'm, I'm not good today. I'm probably gonna be offline, and, uh, I'll catch you tomorrow."*

*One solopreneur captured this in stating "Like, I'm so, so aware that I could not work at a regular job. There's just no way. Um, and I also reflect on how wild it is that I can still run a business, have a creative practice, have a full life. I do have all of these things while it not being symmetrical or regular. Like, it's really based on what my body has decided to do at any given time."*

A key facilitator was the flexibility afforded by virtual working. This was most evident with the for-profit enterprises Joni and Alinker, as well as the solopreneurs, who all work almost exclusively virtually. Transportation is frequently cited as a major barrier by disabled workers and virtual work solves this problem without a need for special interventions or accommodations. What is interesting here is that working remotely or virtually is not seen as an accommodation but as the most effective way of conducting business. Joni Participant 2 shares, "*<We're> super flexible. Um, and I think, yeah, I think from, from the get-go, <my boss>, when I was getting hired on, she was like, "I don't care what your hours are, as long as you're getting them done." Like, like if you're working, you know, the morning, take a break in the afternoon, come back in the evening. If that's what works best for you, then do it. I'm not looking to like micromanage that portion of it. I'm just looking for somebody to get their work done and respond to me when I need something, you know, kind of urgently.*"

In addition to flexibility of when work was completed, several spoke to the flexibility in *how they approached their work*. Participant 1 from ILV shared:

*"It's really important to me, like I'm able to work here and practice social work the way I think social work should be practiced right? It's informed by you know who I am as a person, my cultural values...And so, being able to have an employer that I can practice social work that aligns with, that is everything right? And so so yeah, so it's the flexibility to do the job. But then it's also the flexibility to like practice."*

### [Incorporating Inclusion and Viability/Sustainability.](#)

While some of the case studies were explicitly not intended to be profitable or did not prioritize profit (ILV, One Light) all case studies sought to be inclusive, viable and sustainable. In other words, while they held the social purpose in equal or greater regard than profit, all sought to be viable and sustainable and not just vehicles for inclusion. The for profit and solopreneurs had a

reasonable traditional approach to financial viability. In the case of the solopreneurs, this approach was supported by knowledge, information and mentorship to enhance the viability and sustainability of the business. For One Light, which was always conceived as primarily a social purpose enterprise and a 'learning lab', this took the form of applying business principles and practices to the work to ensure maximum sustainability as a business and typical workplace environment. For ILV this took the form of a typical non-profit and the performance of the core functions of the agency were never secondary to the goal of inclusivity.

Both solopreneurs spoke about the ongoing balancing of accessibility for clients with their own financial viability. This balance was made more challenging due to the fact that they both regularly and purposely offered sliding scale rates for clients who may not be able to access their services otherwise. One specifically advertises on their website sliding scale rates for Black, Indigenous, and Trans-identifying clients (Crows Nest Organizing). Additionally, solopreneurs spoke about how the limited and space availability of external resources to support the growth of their business in becoming more financially viable. For example, one solopreneur stated: *"I know how to do my job where I work with my clients, but everything else has been a really steep learning curve and it was really hard to find accessible resources, and I think it did impact my ability to find funding. I ended up funding my business off of personal line of credit, rather than a business loan, which wasn't ideal, but it was the only thing that was really accessible to me at the time, and I don't know if I could've done this without having had my own good credit."*

Finally, none of the case studies viewed the employment of disabled or other equity seeking groups as detrimental to their broader goals as an enterprise and in many cases the employment of disabled persons was seen as value added to the enterprise. For example, Alinker employed many users of their product as they were best placed to support clients in accessing and using their product. NLEW valued the availability of a workforce willing to work seasonally while ILV valued the knowledge that disabled persons brought to their work, which enhanced their contributions to the work of ILV.

In many cases, there was also a financial benefit to being overtly inclusive or having broad social purpose commitments. Prospective customers increasingly want to know that the businesses they are engaging with not only provide a good product or service but also have strong social values and commitments. Beyond marketing, investors are also increasingly conscious of the sustainability and social impact of companies they invest in.

In speaking to his reasons for investing with Alinker, Participant 3 notes his desire to only invest in social purpose ventures: *"There's a lot going on that's focused on inclusiveness in investors, especially with female led and startups. So, then I started to invest in startups, only either with a purpose, or it should be a female led."*

In conducting these case studies, we have observed a range of businesses/organizations navigating where there are tensions between profit imperatives of business on one hand and social purpose and disability inclusion supports on the other. Some of our case studies see

themselves as involved in systems change while trying to operate within or at least adjacent to the existing system. Moving towards ESG (Environment, Social and Governance) investing, social purpose businesses is increasingly a demand-side factor through which consumers are asking for evidence of social responsibility to multiple stakeholders. Consumers are prepared to pay more for products that – at a minimum – do not harm the planet or other people. Younger generations in particular will avoid purchasing from companies that either do not have demonstrate positive social impact or engage in greenwashing<sup>4</sup> or social washing<sup>5</sup> to seem as if they do.

Anecdotally, the same issue regarding systems change is seen in the impact investing arena, where it is still not clear where or how to balance returns on investment with the diverse economy structures that are building the new economy. Purpose driven social enterprises, their founders, investors, and consumers are in a liminal space of moving from the old paradigm of profit-first and considering profit as moral-neutral, towards what else can be included or created. The problem is that change within a complex adaptive system is difficult to predict or direct.

This was perhaps most evident with Alinker and with the solopreneurs. They all described the difficulty of operating in a capitalist system while not sharing the values of the structure within which they are still required to work. Navigating that tension can limit the organization in many ways with respect to accessing the resources of the existing system - resources that are beneficial and necessary in securing their own impact.

In addition, making profits are also a way of carrying out the social purpose of the business (for example, Joni's "5% Giveback Pledge", whereby they give 5% of every order to their Canadian nonprofit partners). In this way, many of our case studies are living in both worlds, and the existing system is both a barrier and a facilitator of carrying out social purpose.

## DISCUSSION

The case studies discussed in this report provide insight into factors which support inclusive employment across a variety of settings as outlined above. It is worth noting however a number of issues and differences between the case studies that may influence the degree or success of the themes discussed above in promoting inclusive employment.

While all the case studies paid at least minimum wage, few of the employees with disabilities were able to survive exclusively on the income from their employment. This was due both to

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<sup>4</sup> Definition: "Greenwashing is the act of making false or misleading statements about the environmental benefits of a product or practice. It can be a way for companies to continue or expand their polluting as well as related harmful behaviors, all while gaming the system or profiting off well-intentioned, sustainably minded consumers." <https://www.nrdc.org/stories/what-greenwashing>

<sup>5</sup> Social washing is the extended version of greenwashing



work being part time or episodic in some cases or in the case of the solopreneurs, simply due to difficulties in generating enough income. The income gap was addressed in a variety of ways: taking on additional work elsewhere, relying on partners to subsidize living expenses or, continuing to rely on disability benefits as well as earned income.

This was most acute in the two case studies which were more disability specific as in One Light or disability specific initiatives within the broader business as in the case of NLEW and their partnership with AimHi to provide opportunities for seasonal work for people with intellectual disabilities. One Light was able to negotiate a waiver of the standard earnings exemption level of \$12,000 per year which allowed a small number of persons to earn enough to live on. This is not a readily scalable option, though it may suggest some form of temporary exemption would be useful in transitioning from benefits to full-time paid work. For NLEW the nature of the work is not likely to ever be able to provide sufficient income to eliminate the need for supplementary sources.

This leads to the next issue regarding grants and other external sources of income. While this was not a significant factor in the for-profit case studies, it was essential to One Light as the actual income from product sales only covered approximately one third of the revenue needed to sustain the enterprise. This reliance on external grants has meant that work has been very episodic for many of the employees, which limits the number of employees who do not require other sources of income. While theoretically One Light could eventually be a 'break even' enterprise, the gap between revenue and cost is significant. This does not invalidate One Light as an employment option but suggests that an alternative means of subsidizing the work to allow sustainable employment is required.

Another issue worth noting is the use of, or not, of disability specific employment supports such as job coaches, customized employment etc. As noted above, this was not common in the case studies examined here. The most active support from disability or employment support agencies was seen in the NLEW case study. Support for the recruitment, training and transportation was provided to workers by AimHi and Ready, Willing and Able, an employment initiative for people with intellectual and developmental disabilities. The cost of these supports was the responsibility of the outside agency rather than the employer. In the case of One Light, there was a direct linkage between the disability support agency and the enterprise which operated as something of a hybrid of regular employment and a learning lab for inclusive employment. It is worth noting in Joni's case, where they had a partnership with University of Victoria to provide employment opportunities for people with intellectual and developmental disabilities, the support component was provided by a senior Joni employee. While this was viable on a small scale it is unlikely this would work if significant support needs were required. This suggests that, at least for some disabled workers, external supports will continue to be required.

Another issue concerns the size and scale of the businesses/organizations. These ranged from a single 'solopreneur' to small and medium sized businesses. It is notable that the two case studies which employ more than 10 persons in total were those that were connected to or supported by

disability agencies and both required additional resources beyond the business income. While the smaller entities did not require additional support for their inclusive hiring it is unclear from this study if the kind of inclusive businesses/organizations they represent are feasible in medium to larger businesses/organizations where the kind of flexibility, cultural homogeneity and informal communication may be more difficult to realize.

In summary, the case studies provide some significant insights into how a new inclusive economies approach can foster and enhance inclusive employment. That said, there are still significant questions as to how broadly applicable this can be in terms of hiring, supporting, retaining) people with more complex disabilities. It is also clear that for many businesses/organizations, external support and subsidy will be required to support inclusive hiring. The case studies provide some useful insights into how these types of supports can be implemented in ways which are more 'naturally inclusive'. Policy directions will be addressed in the final report integrating all phases of the broader study.

## LIMITATIONS

A key limitation of this project is the alignment with case study methodology in research design and data collection followed by a translational and pragmatic oriented analysis. The small sample size used (as per case study methodology) may limit the applicability of the points of connection and consideration into other organizations and businesses beyond those examined in this study. The research team took this potential limitation into consideration when conducting the translational analysis and team discussions included overt discussions on how the themes shared may apply more generally to other businesses and organizations.

Another key limitation to note is that this report represents our conversations with the businesses/organizations who responded to our call for case study participants, as well as other businesses/organizations to whom we have been alerted or otherwise separately identified. There is potential that self-selection bias influenced the findings. In this study, the case selection was an intentional process, purposively designed to showcase specific insights and experiences in inclusive employment, with the intention of sharing that knowledge and experiences with other businesses, other employers, and other advocates.

A further key limitation is the restricted range of diverse economy activity in these case studies. As mentioned above, we drew our interview candidates from the available pool of self-selected respondents. Further research could identify organizations involved in a greater range of enterprise diversity (such as worker owned co-ops, tribal enterprise), transaction diversity (i.e., local trading systems, co-op exchange, or alternative currencies), and labour diversity (i.e., volunteering, family care, reciprocal labour) for deeper insight into inclusive employment in the new economy (Gibson-Graham & Dombroski 2021).

The trends in this report are presented from the perspective of emerging findings rather than final results.

## REFERENCES

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## APPENDIX A: Semi-Structured Interview Guide

### The New Inclusive Economy - Case Study Interview Guide

*Version: October 11, 2022*

The following will help guide the researcher in collecting information from case study participants. Organization, order and quantity of questions will be determined based on the suitability of each interview participant.

#### **Theme: Participant Information**

- Demographics: age, gender, ethnic background, citizenship, disability status
- Employment Relationship: role with the organization, how long they have worked with organization, FT/PT,
- Proximity: Do they have a family member or loved one that identifies as having a disability? Do they have a child with a disability? Are they close with someone with a disability? Do they work with someone with a disability (what is the working relationship)?

#### **Theme: Employment Setting**

- Business Demographics: sector, region(s) of operation, size of organization, business structure
- Mission/Vision of Business/Organization
- Physical Employment Setting: how many people work on site? Details of physical setting (i.e.. assembly line, offices, cubicles, open concept, etc.), where is the business situated in relation to broader community (downtown, visible, industrial, remote, etc.), general accessibility? Any unique aspects of physical working space?
- Inclusive Impact: % of people with disabilities employed? Disability types represented? Disability participation in leadership?
- Inclusive Practices: Are there any specific inclusive practices they feel their business does well?
  - Recruitment: specific disability recruitment efforts? 3<sup>rd</sup> party recruiters? Employment fairs? Online? DEI statement? Are there any targeted ratios in DEI recruitment efforts?
  - Interviews: Do they support any alternative/innovative interviewing practices?
  - Hiring: What aspects of their onboarding and initial training do they consider inclusive? How so?
  - Career Management: How do they promote growth amongst disabled employees? Do they have regular or alternative performance management plans?
  - UD/Accommodations: Do they aspire to any universal design or accessible practices? Is plain language used in marketing/recruitment material? How do they offer and provide accommodation when needed?
  - Decision Making: When making decisions related to inclusive practices, who is involved and what does the decision-making process look like?

#### **Theme: Diverse Economies**

- Does your business have a social purpose? How is that integrated into the business structure/model? How is the social purpose measured? How is the social mission prioritized against other purposes of the business/organization?
- What types of connections do you have with the local community? Are you connected to any

localized initiatives?

- Does your business have any sort of social purpose certification/affiliation? (Ex. B Corp)
- Does your business have any profit-sharing opportunities for employees? What does this look like?

**Theme: Inclusion Support**

- Does your business offer any training or education around diversity and inclusion?
- Does your business partner with any other organizations or initiatives to support inclusive hiring? Elicit details of partnership. What has made the partnership successful/challenging?
- If someone needed support at work, how would they request that support?
- Ask questions about enabling conditions a) developed within the workplace, b) developed in response to outside barriers, and b) in which the workplace is embedded.

**Theme: Inclusive Values**

- Listen for the guiding values (implicit or explicit)?
- How does disability inclusion fit within the broader values of the business/organization?
- Is there an internal champion or steward of these values? How are these values shared amongst the broader staff/team?
- How are these commitments integrated into the work, and what facilitates or promotes this? How do these values show up in recruitment, hiring, training, leadership, ownership, etc.?

**Theme: Processes/Conditions that Support Inclusive Practices**

- What were the factors that led to the values and practices outlined above?
- Are there any external factors or structural conditions that create challenges in implementing your values? What is the impact and how do you address these challenges?
- What changes or shifts in values (of inclusion) have you seen over time? Internally? Externally? How have these shifts influenced your work?
- How do you measure the implantation or impact of your values?

## APPENDIX B. Case Study Summaries

### ALINKER CASE STUDY

#### SECTION 1: BACKGROUND

Interviews: 5 Interviews

Documents Reviewed: Employee Handbook, Website, Financial Statements, NIE Environmental Scan Survey

##### 1.1 Participant Information

Age	Gender	Ethnicity	Disability Type	Close to Disability	Citizenship	Role	Time with Company
59	Gender Queer	White	Physical	Family	Immigrant from Netherlands	Leadership	2012
44	Cisgender Female	Not specified	None	Friends, coworkers	Canadian	Leadership	2016
60s	Cisgender Male	White	None	Friend	Netherlands	Investor	A few years
44	Cisgender Female	White	Physical	Family	USA	Front line	4 years
64	Cisgender Female	Native American	Physical	Family	USA	Leadership	3 years

##### 1.2 Employment Setting

Alinker is a Certified B Corp, which sells a non-motorized walking bike intended to be a “stigma free” mobility aid. Most of Alinker’s employees work remotely, located across Canada and the United States. Occasionally, the organization operates a pop-up shop in downtown Vancouver, which allows customers the opportunity to see and try the product; this space has also become a hub for Alinker social media creation/engagement.

Alinker, also the name of their product, describes their product as: “The Alinker can be described as a non-motorized walking-bike without pedals. With an adjustable saddle and handlebars, it is custom designed to challenge society’s assumptions about disability. BE designed it to be so cool that it overcomes the divide between people with and without disabilities.” Their product is distributed internationally and has a growing customer base. In addition to direct-to-consumer sales, they operate a rent-to-own model, and support crowd funding campaigns for customers with financial barriers. The crowdfunding campaigns have become a staple of their marketing/sales strategy, with a community of Alinker users built around the campaign activities. To date, 219 crowdfunding campaigns have been completed. (website reference)

The mission of Alinker is to “use our business as a force for good, the Alinker as a vehicle for change. We are committed to creating accessibility to all, reducing inequality, lowering levels of poverty, creating a health system that works for all, building communities, and creating high-quality jobs with dignity and purpose.”

### 1.2a) Roles

Alinker has 5 full-time and 3 part-time staff with some contracted expertise to support various activities. All staff work remotely, with some in-person connections/meetings happening for staff based in Vancouver. Manufacturing of the product takes place overseas (Taiwan), while operations, sales and customer support take place in North America.

### 1.3 Diverse Economies

Alinker is a certified B Corporation and Social Enterprise. They are involved in the Social Enterprise community in Vancouver, regularly participating in events such as SVI (Social Venture Institute: <https://hollyhock.ca/hollyhock-leadership/svi-hollyhock/>). As noted above, Alinker's mission extends beyond profits.

Participant 5 identified this intentional shift away from a profit-based mission as, *"...what people are afraid of in that is we, we are so entrenched in the colonial mindset of you are only successful if you are making money and you are expanding and you are growing and you are doing all of these things. And people are so afraid that if they change the way they're doing things, they're not going to meet those goals and they're not going to be seen as successful. And, you know, that's the beauty of the Alinker. We're not seen as successful by a lot of people, but we're pretty freaking successful (laughs) as far as we're concerned... We're so, so entrenched in that that colonial capitalistic mindset, um, that says everything has to have a goal and everything has to have a reason, and everything has to have, um, you know, this linear movement... as an indigenous person, and I, I'm always saying, you know, I'm so circular, I'm not linear. Um, and most of the rest of the world is linear. And, um, I see us at Alinker as more circular as well. We're very organic."*

In addition to extending the mission beyond profits, Alinker participates in profit sharing with both full-time and part-time employees. Participant 2 explains, *"depending on what is needed in the year, uh, last year we needed more reserves for stock. So we kept, we basically decided to share that 5%."* This has had a significant impact on employees feeling valued, Participant 4 states: *"Well, it's just kindness, and the kindness that they w- would share, you know? I don't know. It just feels like a... Like, "wow, you really wanna share that with me?" You know. So it just feels like, again, included. You know, I always find myself coming back to included when I speak about them, 'cause they always seem to make you feel included... It feels personal, you know? It kind of feels like, um, maybe I'm seen, or they... I don't know. It feels, again, inclus- included. It feels like they just kind of are like, "hey, we see that you're doing a great job, and we wanna share this with you."*

### 1.3a) Finance Stack

In regard to finances, Participant 2 shares: *"I think we, I... We access, what I call, a finance full stack. So a little bit of... Money can come from different places."* It was also noted that they recently became profitable as organization, *"Um, and we also have, um, really funded our inventory through, through our revenues, our own profits. So, two, three years ago we became profitable as an organization."*

The organization also has investment partners. In speaking to his reasons for investing with Alinker, Participant 3 notes his desire to only invest in social purpose ventures: *"There's a lot going on that's focused on inclusiveness in investors, especially with female led and startups. So, then I started to invest in startups, only either with a purpose, or it should be a female led."*

Finally, in addition to traditional sales, Alinker supports crowdfunding its product. This has had a significant impact on organizational sales and culture (discussed more below). Participant 4 shares about her reaction to Alinker crowdfunding, *"I was like wait, they offer something that no one else does. And that's so huge in the... In th- this... This world is that they offer crowdfunding."*

### 1.3b) Business Growth

In terms of growth, Alinker continues to build their market through their online presence. Currently, the bulk of their sales have been located in North America. Seeking to expand their business overseas, they have started partnering with localized distributors. Participant 2 explains the challenges partners face in developing their market: *"So part of the difficulty of expanding fast is, bringing the market up to speed so that they can do minimum order quantities... We have partners in South Africa, in Italy, in Germany, in Switzerland, um, in, um, I'm gonna say in Australia, in New Zealand. Um, and all of them, it takes time to develop the market for this device. Um, and so they purchase maybe 10 or 20 at a time. Which is not enough for it to be a viable business for their region."*

Further in discussing expansion and growth, Participants 1 and 2 explain the need to continue their lean operating practices, with Participant 2 noting, *"Many woman-led companies don't come from, generational wealth... we don't have the, that... we don't have the privilege of losing a lot of money."*

Following this lean operating model and seeking investments only when needed, Participant 2 explains, *"We've, we've only brought on investors as we have something new coming on- ... coming on board. Um, we've matched that with, um, access to a lot of credit."*

### 1.4 Inclusion Support

Alinker's perspective on disability and inclusion is unique from most, seeking to eliminate the need for inclusive supports and practices by eliminating exclusionary practices as a whole. Participant 1 explains, *"Like, if you focus on what serves people the best, you don't have all those other questions of trying to be inclusive and stuff because we're already human centered. And human centered, really human centered, and not just talking about it. Being in the Alinker means that we need to live the life that we say we advocate for."*

Participant 1 continues, *"You can- you only have to talk about inclusion because you have an exclusive environment. ... hat's- that's why I find the word inclusion a very icky term. ... Because you got an exclusive, um, uh, work environment, and you try to in- include somebody, they stick out as a sore thumb because now they're included in the still exclusive environment. It- it's very damaging to people, actually."*

However, when specific supports are needed, Alinker seeks to be proactive in understanding employee needs, Participant 4 shares her experience when starting her job at Alinker: *"So when I started, they send you a laptop to do y- your work from, and they made sure that the laptop... Because I have optic neuritis, they made sure that the laptop would... It doesn't affect your eyes, or it doesn't hurt your eyes as much. So they were very accommodating. They were like, 'let's do this for you so it doesn't hurt your eyes so much.' And, um, they're patient, um, understanding. There's... You know, there's no barriers. It's always, 'you. Your health, or you come first. Not the job. People can wait, you can't.' So I feel heard, which I never did ever before. So it's a totally different work."*



## 1.5 Inclusive Values

As noted above, Alinker has strong opinions and perspectives informing their views on disability & inclusion. Participant 1 states: *"If I have MS, yet I can do now with the Alinker, 50 kilometer run, who's disabled now? Like, what is that? So I think... we need to mess with the assumptions on what titles mean. Plus that, I think, um, we judge people too much on just the external identifiers... This body is a logistical nightmare anyway... It's a logistical nightmare that we constantly have to manage. Whether I walk wonky or miss a leg doesn't change who I am. And so I think it's really important that we focus on who we choose to be as people, instead of being judged on what we have, as exterior. Exterior characteristics. Now, disability, some of it is invisible. Some of it is visible. And when it's visible, people judge. When it's invisible, people judge even harder."*

These strong perspectives are maintained across the organization, as many Alinker employees are also Alinker users and immersed in the Alinker community (discussed more below). Participant 5 speaks to this strong culture, *"I mean, it's just the culture of the organization. Um, you've met <Participant 1>, you know, she is just an incredible human being who, um, has made it very, very clear that the people in her organization come first. And it's, it's not about, um, the selling of bikes is secondary, um, that she's more about the people that, that work for her and about changing, um, the way the workplace is and the way society is. And, um, so yeah, that just, um, all of that makes me just feel very, very held and very, very comfortable with, um, just being who I need to be... So yeah, it just, I think, I think it emanates from her vision for her company and from her curating of the people that she's brought on board. Um, because everyone who works for the Alinker, um, is of a similar mindset. Um, we kind of describe ourselves as we're all kind of a little bit, um, weirdos, um, because we've (laughs), we've never quite fit into the regular workplace (laughs) because our values were different."*

## 1.6 Processes/Conditions that Support Inclusive Practices

Moving away from specific processes and more towards conditions that support inclusive culture, Alinker has worked hard to define their values as an organization, letting practices and processes flow from the articulated values. An example of this values informed practice is the Alinker hiring process. Rarely does the organization define need and post positions, rather, they find people and create positions around them, building on skills and strengths that fit organizational need (more on this below). Participant 1 notes this shift away from traditional hiring processes: *"I care about hiring the right people that get us, and that we get, and that we can tea- we can teach people stuff. That's secondary stuff. It's not necessarily what they can do, it's more who they are. If they get it, the whole mind shift thing, then it's mindset thing healthcare, that's way more important, than that they know how to- how to use Excel, for example. You can learn that."*

Participant 2 shares that their primary pool of candidates originates from their online community, specifically those that have completed crowdfunding campaigns: *"And so I think we have over 200 and 220 campaigns that we have, uh, launched and, and fulfilled. So that seems to be our pool of people. We're, we're, we hi- we hire Alinker users, um, that are able to tell... Inform us collectively what it's like for our customers to experience what they're looking for and what, what challenges they might have, or in the buying experience, um, and how to answer questions about what it's like, what they're having."*

Participant 1 shares their hiring experience of a campaign Alinker user, *"One user, he broke his back, uh, and neck in a big motorcycle accident, and got ... spinal cord injuries. And as I got to know <him>, I was like, "Well, actually, I know you're good on customer service." Because he was working with the insurance company or something... He was like, "Yeah, I would love to come and work with you." So we hired him... And it's, like, it makes for us also total sense to hire Alinker users because they live the life... of an Alinker user."*

In addition to organic hiring processes, Alinker also seeks to provide adequate vacation and sick leave. Focusing less on what is allowed and more on what is needed to be successful and healthy. Participant 2 shares that their vacation and sick leave, *“has been informed by like, just what's humanly needed.”*

## SECTION TWO: “POINTS OF CONNECTION”

### 2.1 Commitment to social purpose and/or social justice, or at least questioning model of conventional workplaces

In terms of social purpose, Alinker cares deeply about thinking beyond their product mission (disability stigma) and towards broader issues of human justice – seeing people as whole and not singular identities.

Participant 1 shares what this looks like from an organizational perspective: *“But I think the more we're in a personal level and willing to personally grown and willing to be on edges where might not be too comfortable, but we're growing. And we're aware of the world out there and who we are in this world. But it's more important than just bringing in your revenues. But that's who we are as a company.”*

In addition to seeking to provide spaces of holistic understanding, Alinker has specially addressed several issues of justice beyond their mandate of disability mobility and stigma.

Most closely related to their mission, is Alinker's stance on the industrial medical complex, which they refer to as “sick care.” They have intentionally decided to operate outside of the system, stating that they are not a medical device, rather they are a mobility aid. Participant 1 explains why Alinker does not align with medical systems, *“Like, the whole medical world that is focused on and only reactive to sick care and disease. Once you're diagnosed, then you're in the sick care...Why don't we focus on health right now? Like, what we food or feed ourselves. And how much we move. Because that is where... if we continue with food systems that we have, that feeds into the pharma systems that we have, then we get to a market that makes money over the back of sick people.”*

Participant 5 notes that this social stance has a direct impact on customers, as most insurance companies will not cover the costs of non-medical, mobility aids. *“We don't participate in the insurance industry because of our values as a company, um, and because we know that that would drive the price up even more and, um, mostly to line the pockets of the insurance companies. And so we don't participate in that, but we get customers sometimes who are upset by that, and we have to be able to explain that to them and help them understand that, um, that this is why we do things the way we do them, and that we're not out to make a huge profit.”*

In addition to the above, Alinker has been intentional about understanding their role as an organization and individuals in conversations on truth and reconciliation. Their website prominently features a section titled, “Our Essence,” which includes a land acknowledgment, values statement, a “what you can do” section, additional resources for learning, and a list of indigenous women owned businesses. Participant 5, who identifies as Indigenous, helped inform the “Essence” section of the website: *“And to feel like I have the privilege of being able to gently address that and educate folks and say, “Um, this is not really the right way to be looking at this, you know, as an indigenous person, let me tell you.”*

Participant 5 further spoke about the impact Alinker's commitment to truth and reconciliation has had on her, *“It's been amazing. Um, again, I've, I've never felt so accepted for, uh, the way I think and the way I*

*believe, um, at any place I've ever worked. Um, I've had other places where I worked where I said I was indigenous and people laughed, (laughs), or people, you know, made jokes about it. Um, you know, all those kinds of things. Um, it's always been, that's always been a struggle to, to be looked at as different and not having that identity valued. And with Alinker, it's valued. It's, it's seen as, as a positive thing, and it's seen as, um, uh, wisdom that's, that's to be shared."*

Participant 4 spoke to her own learning on the issue, *"We do r- recognize like, the land that we're on, which I think is amazing. I've learned so much, um, doing so."*

Connected to this, has been a purposeful conversation on anti-racism and white supremacy in the workplace. Alinker met for a guided training over the period of several months to discuss the issue. Participant 2 explains, *"We did <the anti-racism training> collectively together. We found a great resource that we each presented one part of it each week (during the team meeting)."*

Participant 4 discussed her experience, *"I knew a lot of racism already existed. I'm 44, so I mean, I grew up in Louisiana, which is horrible. You know? There's great things and there's horrible things but, um, <these conversations> were not something I participated in and I never thought it was right, and I knew from a very young age that it wasn't right. I could feel it. I could feel it right in my soul, so I knew that that's not something I wanted to do. So when this became something we were talking about, I actually got excited because I was like, "finally, somebody wants to talk about all the shit that is wrong in this world." Sorry for cussing. But I mean, it's just so much stuff. And I mean, "we're gonna talk about this? We're including this in our job? This is awesome, because I think the world sucks."*

Participant 5 speaks to her experience during the anti-racism training: *"And, um, all of it is just, you know, we've, we have, like you said, done so much work with, with, um, looking at anti-racism and, and looking at our own white privilege and how that looks and dismantling that. We've done, um, you know, most people, they have, uh, team meetings where all you do is, is look at, um, uh, statistics and, you know, things like that. And our team meetings were, "You know, let's talk about this aspect of white, white privilege today." And we would spend an hour talking about that. And, um, I think it really helped build us as a team, um, because, um, when you're talking about those kinds of things, um, you have to be vulnerable and you have to be, um, truthful or, um, or you have to just kind of sit back. It feels like we've, we've been on that journey together."*

All of the above speaks to the organization's social purpose extending beyond one issue, seeking to create healthier and whole communities. Participant 5 spoke to this, *"I feel so privileged to work for Alinker because of that, um, because I do feel like, um, we're doing important work, um, that has absolutely nothing to do with selling this crazy mobility device. We're building up each other and then helping building up our wider community...As an indigenous person, I don't tend to put people in categories and boxes. Um...my language has, has a saying [foreign language word], meaning we are all related. And ... it's all part of the one. And, um, as, as we talk about disability and inclusivity, if we're, if we expand our knowledge and we expand our understanding of people as other, um, in, within the disability community, it, it feels like that can only help to, um, translate into expanding our understanding of people as other, as indigenous or as black or as, um, you know, Asian or, or whatever that it's, it's just a mindset of, of learning to expand our own world and look beyond our own limitations."*

## 2.2 Flexibility and agency

Flexibility and individual agency to perform work responsibilities when the employee is at their best is key to how Alinker operates. As noted, Alinker employees work almost entirely from their home offices. In discussing how tasks are delegated, Participant 1 noted the need to have common goals and direction, *“We are an organic... being an organic organization means you're actually paying attention to what's live and real. As opposed to, like, a box. You are- you're- you're not a straight line. There are bends and curves that you have to deal with. And they're never gonna be perfect, but we're all going to work in the same direction and not leave people behind. And- and be working towards something.”*

Participant 2 further explains, *“They tell us when they need time off. Um, when it's the right time for them to work. Um, based on their ability to focus and stay aware.”*

Participant 4 shares what this working arrangement looks like for her: *“At home, if I'm... MS will make you nauseous. So if in the morning I'm just super nauseous, I can have that time, you know, t- to go through that, and then jump on and, you know, answer the customers.”*

Participant 5 had a similar experience: *“Well, I'm working entirely remotely, so I'm working from home. So it's, it's perfect. I mean, I'm, I can be comfortable. I can be, you know, if I'm having a really bad day, I can be in my bed in my pajamas if I want to, as long as I don't have, you know, a meeting. And if I have a meeting, I, I'm only from here up, so (laughs). Um, so yeah. And, and it allows me, um, Alinker pretty much allows me to set my own schedule. So if I'm having a, a really rough day, a really high pain day, I can just say, “Hey, I'm, I'm not good today. I'm probably gonna be offline, and, uh, I'll catch you tomorrow.” And, uh, they're, they're really good about that...Um, that I'm not afraid to say I'm having a really bad day and I can't do what I need to do today. Um, or I'm not afraid to say, “Um, you know, I need to take time off for a doctor's appointment, or I, you know, whatever I need to do.”*

## 2.3 Communication (not always verbal) and psychological safety

Given the high level of flexibility built into the remote work environment of Alinker, communication is seen as essential to ensure the team is effectively working together. In discussing how team collaboration happens, Participant 2 explains, *“Like, there's- there's room and space in that, um, and I think the flexibility, we have one team meeting a week and then each department has their own team meetings throughout the week, um, just being there and just mostly being a responsible adult, sharing when you're online or offline. Our office is Slack.”*

In addition to regular communication, the interview team discussed how remote team members would approach challenging situations or problems, Participant 4 shared: *“That would be a one-on-one huddle. I would ping <my co-worker> or, um, and just send her a slack and say “hey, can we chat?” And she's pretty... Pretty quick on saying “absolutely.”*

The employee handbook suggests performance feedback take place annually, and while team members say this happens, they believed most important feedback happened more frequently and informally. In addition, feedback was not always provided from the top down, Participant 5 explains, *“We do all look at each other as equal members of this team. And, um, so, um, I think, um, when anybo- any of us have needed feedback on anything, um, you know, it's just been who's the most appropriate person to give them that feedback.”*

In regards to feeling psychological safety and support, both Participants 4 and 5 expressed their comfort on the team, with Participant 4, *“And it's the people, too. You know, I have really great teammates, and they always show up for each other.”* Participant 5 states, *“I feel completely supported.”*

## 2.4 Champions in leadership positions can drive culture and inclusivity through the whole organization

N/A

## 2.5 Meet people where they are

As noted earlier, Alinker recruits employees from their pool of completed crowdfunding campaign participants. This is an intentional strategy to retain values, culture and internal product expertise, as they are all Alinker users. Interestingly, they do not articulate business need and create a related employment position, rather, they start with individual skills and strengths and build a position around the individual. Participant 1 explains what this looks like, *“The first question to people when we hire them is, like, ‘What is your ideal job?’ What would you love to do? Because if people love what they're doing, they're probably gonna perform a lot better. They're probably gonna stick with you longer. They're probably gonna learn a lot more. And then it's up to us as management to see, like, oh, well, you like to do, like, you like to do that. There's a gap. We need to hi- find somebody to do that because neither of them likes to do that. That's our job.”*

Participant 4 shared about how this process worked for her after meeting Participant 1 on a zoom call for new Alinker users: *“I don't even really think I had an interview... That was it from there. And then, um, not long after that, she kind of offered me a job. She said, ‘I don't know what I'm gonna do with you, but I want you with Alinker. So I was super excited, ‘cause it felt like home. It felt like the first time since I had been a disabled person that I felt like I belonged in this world. ‘Cause I don't. You know, you know? So that was an amazing feeling, and that feeling has really never gone away, and that's been four years.”*

Participant 5 had a similar experience: *“I had recently lost my position on my, on previous online position, and in talking <Participant 1> heard that, and she just kind of said to me, ‘How would you like to come work for the Alinker?’ And I basically said, ‘What (laughs)?’ And, um, she just said, ‘Well, you know, in talking to you, it sounds like you've got a lot of talents that we can use and, you know, I'd love to have you come on board.’ And I said, ‘Well, what would my position be?’ And she basically said, ‘You got a lot of things we can use, we'll figure it out.’”*

Growth within the organization followed a similar model, Participant 5 shared: *“So the position kind of grew with <me> and kind of as I figured out different things that, um, matched my skills and strengths, that's kind of how the position grew. Now I'm doing a lot of stuff with, um, our marketing team, um, because that's been an interest of mine, and, um, so they've given me an opportunity to get in that and, and start learning more about marketing.”*

Participant 2 talked about the impact this model of employment has on the culture of the organization, *“Challenging yourself to be more aware about who you actually are... And so I think it's probably not very often that we find organizations that we want you to individually be the best version of you.”*

## ILV CASE STUDY

### SECTION 1: BACKGROUND

Interviews: 4 Interviews

Documents Reviewed: Website, NIE Environmental Scan Survey

#### 1.1 Participant Information

Age	Gender	Ethnicity	Disability Type	Close to Disability	Citizenship	Role	Time with Company
48	Cisgender Female	Indigenous	Yes, not specified	Yes, not specified	Canadian	Leadership	24 years
40	Cisgender Female	White	Yes, not specified	Yes, not specified	Canadian	Front line	13 years
58	Cisgender Female	White	Yes, not specified	Yes, not specified	Canadian	Front line	20 years
51	Cisgender Female	White	Yes, not specified	Yes, not specified	Canadian	Administration	5 years

#### 1.2 Employment Setting

Independent Living Vernon (ILV) is a small non-profit located in Vernon, B.C. They are part of the Canadian Association of Independent Living, which is a collective movement to provide pan-disability resources with a philosophy distinguishing themselves from a medical model of supports. The Independent Living movement defines their philosophy as, “The Independent Living (IL) philosophy is an alternative approach to the traditional medical/rehabilitation service delivery model. The IL philosophy promotes and encourages an attitude of self-direction in consumers so they can negotiate and access the community services and resources they require in order to participate as equal citizens in their community. The IL philosophy recognizes the rights of individuals with disabilities to assume risks and make choices.”

Further, ILV lists their mission as: “To create sustainable community links, to work for societal change, and to remove barriers so that people with disabilities have the opportunity to realize their full potential.”

The ILV office, which includes shared space in the “People Place,” is located in the city centre of Vernon, B.C. This area of town experiences a high number of people facing extreme poverty and under-un-housed individuals. This has had an impact on the ILV staff and offices and the types of interactions they are having with consumers (people that use their services) and community members. In regards to volume of support, the ILV team supports around 150 people per week, with many visiting their location in-person to receive assistance.

### **1.2a) Roles**

ILV has 6 staff members with most working part-time. Aside from the clerical and bookkeeping support, all staff are Registered Social Workers, and provide support in the various areas of programming. Most staff have been part of the organization for long periods of time. The organization also hosts unpaid practicum students working towards their social work degrees.

### **1.3 Diverse Economies**

As a non-profit organization, ILV operates outside of a traditional business model. Instead, they receive funds from various grant-based initiatives, including some provincial funding, B.C. gaming funds, and various community grants. They also have several fee-for-service offerings to support their programming.

#### **1.3a) Finance stack**

N/A

#### **1.3b) Business growth**

While the organization is not seeking intentional growth, it was noted that their services and supports have evolved over time. In addition, it was noted that the types of people they support have evolved alongside programming, as well as alongside the changing demographics of their community.

### **1.4 Inclusion Support**

In terms of physical space, ILV has been intentional about increased accessibility for both staff and consumers. Participant 1 explains: "The way our office is structured, when you kind of come through a front door, it's really open. When you first come in like our front desk, is there, but there's quite an open space between the door and the front desk. And you know we do that intentionally to make sure that there's lots of room for, like big scooters, wheelchairs, you know, people with various mobility issues and stuff like that. We really like that piece. We were able to redo our office probably about 6 years ago, to get new flooring, new paint. And so we were really cognizant about you know, principles of universal design, and making sure that there's contrast between floors and walls, furniture and stuff like that... just so that people feel really comfortable."

Additionally, the built environment and the impact it has on both consumers and staff is something their team regularly adjusts to facilitate inclusive space. Participant 1 notes, "Many consumers that have such a variety of disabilities like, we're just constantly having to shift things right, and also for our staff as well. Just because one day something works another day it might not work."

In regard to staff accommodations, flexibility was noted as a key accommodation support by most (more on this below). In addition, Participant 3 noted that she experiences pain and has received accommodations in her physical working space, "I have a different kind of layout of computers. I've also got an accessible mouse and my keyboard is more ergonomic."



## 1.5 Inclusive Values

As an organization dedicated to “removing barriers so that people with disabilities have the opportunity to realize their full potential,” inclusion and inclusive values are central to the work of ILV. Several participants spoke to the values of the Independent Living philosophy and their impact both in and beyond the workplace. Participant 3 states, *“The independent living philosophy is not something that I just exercise here. It's something that's really embedded in to me like, like I really connect with it. You know that people have choice and control, and that you know that they should be able to exercise that as best as possible...That's part of my life outside of work.”*

Participant 4 spoke to the ways in which embracing the IL philosophy and inclusive values have impacted her self-perspective, *“back when I stopped being able to work, I didn't know I had a disability. I just thought it was a character flaw. So, it's giving me back a lot of self-respect, and that I know I have the respect of others, it means a lot.”*

## 1.6 Processes/Conditions that Support Inclusive Practices

In regard to staff accommodations, flexibility was noted as a key accommodation support by most (more on this below). In addition, Participant 3 noted that she experiences pain and has received accommodations in her physical working space, *“I have a different kind of layout of computers. I've also got an accessible mouse and my keyboard is more ergonomic.”*

## SECTION TWO: "POINTS OF CONNECTION"

### 2.1 Commitment to social purpose and/or social justice, or at least questioning model of conventional workplaces

Similar to other case study participants, ILV seeks to see people as whole and not singular identities. Again, as a social service agency, the ILV team is regularly engaging in support activities and conversation. While they are focused specifically on supporting people with disabilities, it was noted that they understand the importance of seeing need beyond disability related support, Participant 1 explained, *“I've been really trying to work on, you know, ensuring that that we're not just focused on disability, either. Right? That we're focused on people as like as people. You know all the parts of who they are that come along with them right?”* Participant 3 noted this perspective extends across the team, *“I think I've learned that from <my co-worker>. And I mean, it kind of becomes second nature to me now...I just see a larger picture with everybody, right?”*

Beyond perspectives, this value of seeing outside of disability support needs, extends into the ways in which ILV partners with other types of services and supports. Participant 1 shares that, *“The collaboration piece is a really big one. I just, I don't see that with a lot of other organizations doing that, because they're all like, this is my money, or this is our client group, or, you know, like, there's a real competition. And we try to be like, what do you need?”*

The commitment to collaboration and working across sector specific need has had significant impact on the people served, extending ILV capacity and types of support offered. Participant 3 explains, *“I've helped people get off the street. And you know, we work with another organization to get them housing. And then, because we don't do housing, of course, and so what would happen is they would end up back on the street*



*and not getting the help they need.”*

It was noted that the need for and sense of collaboration was rooted in the Indigenous heritage of the organization’s leader. Participant 4 shares that this is felt both in how the organization partners with other service providers, as well as within the team, allowing for voices across the organization to be heard and valued. She shares, *“<Our boss> gets everybody's input first. She understands the why we want it this way and why we were going to say that and why we were going to vote that way except you never vote, we just talk. And so yeah, I think the smaller community style consensus has definitely informed how she leads in that it gives me a feeling of like I've got a lot to say in the matter, And I don't feel like there's a real echelon of hierarchy here.”*

Participant 1 shares that her Indigenous heritage values all perspectives and this has informed her leadership style or welcoming input from all team members, *“If we if we have something to give, we'll give it and yeah. That's another piece about how kind of my upbringing and our my teachings have influence.”*

In addition to providing space for all voices and perspectives, it was noted that this has resulted in allowing for the team to think outside of the box in terms of the ways they provide support. Participant 2 notes, *“Things are not as black and white here. So there's room to go into like a gray area, and to go into seeing different inputs and not always the same outcomes.”*

## **2.2 Flexibility and agency**

Flexibility and agency in work method/mode was noted across interviews as a key facilitator in supporting an inclusive and positive work environment. Unlike some other case study participants, most ILV work is completed in office with remote work happening only occasionally. For the ILV team, flexibility was most often described as flexibility of scheduling and feeling empowered to come to work when they were feeling healthy and able. All ILV participants identified as having a disability and this was discussed by several in resulting fluctuating need. Participant 3 notes that, *“So if I have a doctor's appointment, or I have an appointment that I need to go to Physio or something. I can work around that.”* Similarly, Participant 4 shares, *“There have been times when I've been completely overwhelmed. And I've just scraped the bare minimum. And that was okay. Knowing that, you know, I still felt responsible for the job, and that I would come back and get to it when I could.”*

The idea that presenteeism was not required to do a job well was noted as a key value of the organization, with Participant 1 sharing, *“one of my big pieces that I always talk about is like, what's the worst that can happen if we have to do something a little bit differently. So that adds to the busyness of the work that we do, because we're having to adjust things a lot for to make sure that people feel accommodated both staff and the consumers...We kind of have this motto in the office, like, you know, we'll figure it out.”*

Noting the impact this level of flexibility has on work outcomes and productivity, Participant 1 further shared: *“There are some things that need to get done right? I mean, you know, we have a parking permit program. So we got it. We got to move those along and stuff. And so but a lot of times we'll have a staff person that'll be like, you know. Hey? I'm not feeling it today. Can I just come in on the weekend? Absolutely right, if that works better for you? And then so the work still gets done.”*

Beyond when work gets completed, flexibility was also noted in the ways in which the work was completed. Participant 1 shares, *“It's really important to me, like I'm able to work here and practice social work the way*

*I think social work should be practiced right? It's informed by you know who I am as a person, my cultural values...And so, being able to have an employer that I can practice social work that aligns with, that is everything right? And so so yeah, so it's the flexibility to do the job. But then it's also the flexibility to like practice."*

### **2.3 Communication (not always verbal) and psychological safety**

Most of the ILV team has been with the organization over ten years and their level of comfort and perceived psychological safety is strongly embedded in team culture. Participant 3 explains, *"We feel comfortable talking to each other about what's going on. I think that makes a very big difference for our workplace compared to other workplaces. Everyone has the opportunity to share their concerns and barriers."*

While formal performance reviews are included in the employee handbook, the importance of informal and regular feedback was noted by several. Participant 3 shares her preferred style of feedback and communication, *"I think, more organically, we do touch base regularly, we meet during group supervision on Wednesdays. And we, you know, share what we're doing. And if there's any support that we need, we share that way as well. It's just very supportive."* Participant 2 shares, *"It's easy for me. I feel comfortable going to <our boss> and just talking about what's going on, and we work out the schedule that'll work best for what I'm doing."*

In addition to leadership support, the ILV team has a culture of co-worker support. Participant 3 shares about this intentionality amongst the team, *"I just keep my eyes and ears open, and just ask, you know, hey, is there anything that I can support you this morning? <My coworker> told me she had a lot on her plate, and I said, Is there anything that I can help you with? So just in general, having an open communication with the team and picking up where the folks need support and back and forth."*

This respectful and supportive sense of communication extends to challenging conversations as well. Participant 4 recounted a situation in which she made a significant error in her work. She shares, *"There was no anger. There was no, you should have been doing better. There's no I'm paying you for better. There was just this happened. Let's move on."* Having previously experienced anger in the workplace, Participant 4 notes the difference at ILV, *"I knew that I was making mistakes, and I wasn't performing my best, and that somebody else would probably be better able to help them. And so I stepped back. I had an over exaggerated sense of responsibility for that kind of thing. I tried doing that <at ILV>, and <my boss> told me that she wanted me to stay. She said, you get along with everybody here. We're cohesive team now. That's more important to me than the few mistakes that you make." It made a big impact on me."*

### **2.4 Champions in leadership positions can drive culture and inclusivity through the whole organization**

N/A

### **2.5 Meet people where they are**

As noted above, the culture of ILV is founded on respectful and holistic support of both staff and consumers. Participant 1 shares this focus, *"One of my biggest pieces is like, how do we provide support? To our staff in order to be able to make sure that they can, that they can do this work right? Because our wages are crappy,*

*we don't have benefits right?...So that's one thing that we really, we talk a lot about in in our organization is like, how are you actually doing? What do you actually need? Right? And you know, how can we make this better?"*

This is felt by the staff team in both tangible and intangible ways. Participant 4 noted that her work tasks were modified and reallocated when she was struggling, *"I was really overwhelmed, and I couldn't guarantee that I would be able to get <my task> completed on time. <My coworker> offered to take that off my plate, and that really helped me bounce back and so we're trying to find a way to make it a more manageable."*

Participant 2 shared a similar experience, noting that while she is great at her job, she often needs more time to get things completed. She notes, *"I'm slower at doing things like emails and typing and reading stuff. I'm slower. So, I need to be accommodated in that aspect. And also, that my speech is slower. So, it's good that they know that and support that."*

# ONELIGHT CASE STUDY

## SECTION 1: BACKGROUND

Interviewees: Five interviews conducted in 2023, via Zoom. One researcher conducted a brief site visit in March 2023.

Documents reviewed: Website, reports from previous research participation, NIE environmental scan survey.

### 1.1 Participant Information

Age	Gender	Ethnicity	Disability Type	Close to Disability	Citizenship	Role	Time with Company
42	Cisgender Female	White (Irish, Polish, and Mi'kmaq)	Mental health	Family, coworkers	Canadian	Leadership	6 years total, 4 years paid
64	Cisgender Female	White (Scottish, Norwegian, Swedish)	Physical	Family, coworkers	Canadian	Front line	4 years
47	Cisgender Female	White	Learning disability	Family, coworkers	Canadian	Management	1.5 years
41	Cisgender Male	European/Greek	No	Family, coworkers, prior jobs		Management	a few months?
48	Cisgender Male	White	Physical, cognitive	No response shared	Canadian	Front line	4 years

We conducted five interviews with participants ranging in age from 40s to 60s; three of whom identify as female and two identify as male. Three of the participants identify as living with a disability and two do not. However, almost all participants in this case study reported being close to people who live with disability (siblings, children, parents), and all work with people who live with disability. The duration of employment ranged from a few months to four years with the OneLight project, which is the current extent of the project's length. All interviewees have worked in other organisations prior to OneLight, in a diverse range of backgrounds including farm work, security, publishing, managing large restaurants, as well as in entrepreneurial and corporate settings.

### 1.2 Employment Setting

OneLight is a social enterprise engaged in the manufacturing of firestarters made from reclaimed materials. Their website (<https://onelight.ca/>) explains: *"OneLight fire starter will start your fire in minutes without kindling and is built with 99% recycled materials that are diverted from the waste stream. OneLight is a social enterprise created in 2020 with a vision for inclusive employment in manufacturing with the added goal of creating products made from recycled materials. Our fire starter is handmade with recycled untreated lumber, paper rolls, candle wax, and a wick".*

The firestarters are called OneLights, which is the same name as the social enterprise. The non-management employees are called “makers”, and all work in a light industry building in Powell River, located on the traditional territory of the Tla’amin Nation. Inside the building are several workstations for the manufacture of the firestarters, including presses, woodcutting machines, a wax dip, and wicking placement. There are offices upstairs and a warehouse facility for material preparation at the back.

OneLight is located on a bus route, not far from the centre of Powell River, with free parking on premises (which was part of the decision to use that site (<https://www.qimproject.com/research>)). OneLight is a project supported, initiated by, and under the umbrella of *inclusion Powell River*, a not-for-profit organisation with the mission to build a “safe, inclusive community where everyone belongs”.

The project began as an employment support program within the gathet [inclusive manufacturing pilot](#) with an 18-month government grant. OneLight has the capacity to employ up to 35 makers.

At the height of production there were 30 makers and 4 supervisors with an output of around 10,000 units per month. <https://www.qimproject.com/phase-three-report>. When the funding for the initial project was not renewed, the team sought gap funding and operated with reduced staff, while waiting for approval of more permanent funding. Moreover, the project experienced many interruptions due to Covid.

OneLight has employed people from a variety of backgrounds and abilities experiencing a variety of barriers to work. Employment is not positively discriminatory or exclusionary. Some employees may have no barriers to work other than a lack of experience. When beginning to hire for the project, the leaders put out an open call for employees.

### 1.2a) Roles

At the time of writing, in November 2023, OneLight employs eight people, of which six are in paid positions and two are volunteers. Two of the employees – the two managers – are full time, and the six makers are working 20 hours or less. Five out of the eight employees live with disabilities.

Case study interview participants ranged from newly employed (within the past few months) to working with the organisation from the beginning of the project. In total we interviewed five people from OneLight across a period from eight months from February to October: two employees (called Makers in OneLight), two managers, and the project director.

It should be noted here, and will be disclosed in the final report, that there was a special circumstance with this case study. The director of OneLight is also the director of the New Inclusive Economy project. Due to the potential for increased difficulty in ensuring data privacy for the OneLight participants, we altered the consent form accordingly, with additional disclosure and discussion in the preamble to the interviews to ensure that our interviewees were aware of this potential conflict or extra risk to their participation.

### 1.3 Diverse Economies

OneLight is described as a social enterprise, and as a “revenue negative business”. There exists within the organization a strong motivation and values for social impact (see section 2.1) that supersedes the motivation for profit. The purpose of the organization is to provide work environments that are positive for people.

Quote from Participant 1: *So, I describe One Light as a revenue negative business. And so, by revenue negative, that means we do not produce and sell enough product to pay for our operational costs. And so, in the business world, that would be considered a failed business, but we don't consider it a failed business because what we also produce is work environments that are suitable to people who have not been able to find employment elsewhere and we also share the learning about those environments with other employers so that they can adopt some of our practices.*

### 1.3a) Finance stack

The “finance stack” employed by OneLight includes profit from the sale of OneLights, government grants, and profit distribution from an “ecosystem” of social enterprises under the inclusion Powell River umbrella. There are currently two other inclusive employment social enterprises within the ecosystem, one of which is revenue positive and intended to channel funds into OneLight.

Quote from participant 1: *So, we have to have grant revenue to be able to operate this social enterprise, and that's very typical of workforce integration social enterprises. Most of them have a, um, some kind of other revenue because our cost of operating is much higher than a typical business... We also have other social enterprises that ideally are feeding revenue into One Light, so revenue positive social enterprises.... So that if you look at it as an ecosystem or as a whole package, all of our enterprises, then it doesn't matter that it's revenue negative, but it is definitely revenue negative, and by quite a bit.”*

We heard that one third of operating costs come from sales and production, while two thirds come from grants. Labour is the greatest overhead, and revenue is not sufficient to cover all wages, let alone other fixed costs. As a result, OneLight still relies on grants to operate, and report having approximately 10 different sources of funding over four years of operations.

### 1.3b) Business growth or financial sustainability

The discontinuity of funding and revenue is an issue for the financial sustainability of the enterprise. However, there is strong demand for positions at OneLight – at present, there are 40 people on their employment waitlist. OneLight has the capacity to employ up to 35 makers, so the missing piece is funding to pay the wages.

There is also a significant opportunity cost involved in applying for funding. We heard that grant applications consume around 50% of the director’s time, and there are other managers involved in the process. This is a significant administrative overhead when compared with the estimated cost of \$200 000 to sustain the project every year.

## 1.4 Inclusion Support

Inclusion support at OneLight is deliberate and codified, offered through the structure and intention of the organisation, as well as via specific training, role crafting, flexibility, and hiring practices (more on this below). In addition, OneLight negotiated an exemption to the income support rules such that makers could keep every dollar of their earnings, so they did not lose their disability payments while working at OneLight. This supported the makers in experimenting with earning and working in a way that suited them. We heard that most people did not actually exceed their allowable earnings, but some did, and in that 18 months were able to make money and use the income in a way that they had never before been able. During the interviews it was noted that in many ways, OneLight functions as something of an “inclusive employment lab”.

In addition to financial and organizational sustainability, we can consider the sustainability of employment after receiving inclusion supports. For example, some people go on to other employment afterwards:

Participant 1 noted: *“And I know all of the folks who were supported by employment services, so those are people with intellectual and developmental disabilities, there were 10 people out of the 30 who were CLBC eligible, they all went on to work. Um, th- those that had employment services, and went into work into other areas. Yeah. So, that was very cool to see.”*

Further detail on employment opportunities from Participant 1: *“[before coming to OneLight] a significant proportion of the participants had not been employed. They'd either never been employed or they had been une-, not employed for many, many years. Um, and so, it was very surprising for us to learn that people, after being at One Light, decided to continue in the labor market, and I think it's because they recognized, and this is what was shared with me, was that, um, that, how good work made them feel. And just working and getting up and having a place to go, and getting over that, um, that fear of, um, having their disability or other incomes taken away if they had gone, if they went to work.”*

Inclusion supports and accommodations were explicitly arranged at the interviewing/onboarding stage. We heard that reframing supports as “tools” can help foster a perspective that these are ways to facilitate work rather than an accommodation or something that might be perceived as negative. Participant 3 described tools as *“being smart, helpful... it's, you know, ingenuity... we see it as working smart and, and, coming in and using those tools to do your job really well.”*

Participant 2 spoke about the hiring and onboarding stage: *“And both of them said, “Is there anything we can do specifically for you? Do you need any special equipment ... or, you know, any, anything that we could do to make the job easier for you?” And I believe they, they did that for everybody.*

*... there was a lot of written material initially for us to sign and, and, you know, like I say, the, the special things we might need to help us.*

*....We had a lot of opportunity, actually. .... If you got tired of one [task], you can just say, “I really need a break from this,” and you can do something else.”*

## 1.5 Inclusive Values

Inclusive values are intrinsic to the existence and operation of the organisation, given that it is funded and organised to provide accessible inclusive employment opportunities. These values are both explicit and implicit.

With respect to impact of these values, we heard that “the best way to get people with disabilities into employment is to give them a job.”

Participant 3 spoke about the values regarding supports: *“Task modification is one of our values, right? [W]hen we talk to people, I really wanna make people feel that they're empowered, that they're not asking for something out of the norm, that this is part of the job.”*



## 1.6 Processes/Conditions that Support Inclusive Practices

OneLight has experimented with many inclusive employment practices; i.e., hiring, training, retention practices, and communication.

When hiring new makers, the managers send out the interview questions first and encourage interviewees to bring a personal consultee to the interview. Upon hiring and onboarding, they explicitly ask the employee which supports are required so they can ensure the most accessible workplace.

OneLight offers flexible hours and encourage using that flexibility to work in a way that suits the employee (more about flexibility below). The organisation has deliberate communication practices (more about this below). They also offer training in inclusivity and respecting differences and contributions of everyone (more on this below).

We heard that the philosophy is to offer something of a “trampoline effect” via the flexibility and experimental approach to figuring out what works for each person. Makers are given the opportunity to practice self-advocacy, which can result in increased confidence going into further work (more about this below).

The profit imperative was identified as one of the structural barriers to supportive and inclusive employment more broadly; i.e., the requirement in the mainstream economy to not only be revenue positive but to deliver significant profits to shareholders. This may be achieved by cost-cutting through loading increasing responsibilities onto the existing employees, which then produces a need to hire people who are perceived as more likely to handle the (more than) full-time workload.

Participant 4 reflected on their time in a profit-driven corporate environment: *“So the big focus was, “We need to bring people on that can take on this huge capacity,” it's just high capacity, high capacity, high capacity. You need to be able to hammer away, work 60 hours a week. That's how we're gonna make a profit. Um, but then you ... start kinda hitting overtime, um, you start losing money, uh, with people going off, let's say, on, on sick leaves, and whatever else. So I think right now, i- it might be a turning point in a lot of these kind of corporate environments, because they're just not finding bodies, right? They were cutting back, cutting back, cutting back, but now they're not finding the bodies that they needed. Um, so they're going to have to shift the way they do business. And I think there is an opportunity to bring on additional people, maybe for less hours.”*

With respect to the impact of overcoming those structural barriers, one of the flow-on impacts is reduced hospitalisations and use of medical services, which reduces costs to governments.

Quote from participant 1: *“So we had, we had one gentleman and he's, he's, um, there's a video of him saying this so I can disclose it, um, that we have on our website. But he used to go to the hospital at least once a month, sometimes once a week to the psych ward to commit himself, um, because he has, um, bipolar disorder, and he has not been to the hospital since he began at One Light over a year and a half ago. So that's how many? 12, 12 to 16 hospital visits for one individual. Um, and 30% of those 36 people did not, they did not go to the hospital, they did not, um, use other services as a result of having a job and feeling more stabilized as a result of having a job.*

*So there's those cost savings that are like very hard to capture. [T]here was reduced suicidality. So how do you quantify someone not taking their own life?”*



Participant 3: *"people love being part of a team. ... Um, I hear the word useful. I hear the word, I like to come in... engage, like that's something that I definitely hear come up. [A]nd pride, and money."*

Delivering on the social purpose of the organisation also gives purpose to the participants:

Participant 2: *"Purpose. The fellow that I talked about with the bipolar, he said he looks forward to getting up every morning now...I had people tell me, one person in particular, well, no, two, that, um, their suicidality had decreased, that they realized that, with this purpose that they have now, having to get up, going to work, doing what they can. The friendships too, we form friendships down there. I go out for coffee with one lady quite regularly. I have another fellow that, um, he checks with me to see if any more grants have come in because he really wants to come back to work. And I phone and check in with him. Um, but the biggest thing in a nutshell is probably purpose. This has really brought a lot of people together and given them a reason, a reason for getting up every day."*

## SECTION TWO: "POINTS OF CONNECTION"

### 2.1 Commitment to social purpose and/or social justice, or at least questioning model of conventional workplaces

OneLight is built on a commitment to social purpose and questioning the model of conventional workplaces in that they actively seek to create inclusive and accessible work opportunities as the priority rather than profit maximisation (see previous section about being a "revenue negative" business).

The organisation is deeply committed to giving people the opportunities they desire for themselves. We heard this repeatedly in the interviews, saw it recorded on their organisational website, and in their previous reports.

We heard a commitment to that social purpose from all interviewees, as well as the impact of that commitment and the future opportunities it offers. By focusing on its social purpose, OneLight creates social value rather than financial value at this point in the organisation life cycle.

Participant 3: *"So I think, the value proposition in One Light is ...more of an employment piece. [W]e have people that come in and are employed here, have a wonderful experience and then have the knowledge that they are able to go into do other things that they're, that they have value. And it makes me so sad that that's something that people get from here because that should just exist."*

*And I start thinking about, um, the, the effects that someone has when they come in here and that they, the amount of people that leave more employment ready, build skills, um, what, what that brings into their family and to their community. I mean, the reaches are so huge, right?*

*I'm like, oh, is this a valuable business? And does it make sense for people to put money into this program? Absolutely. The business part of me, totally makes me go, "This is ridiculous." (laughs). Um, but you know, when you, when you see someone who hasn't worked for 20 years, comes in here, has this experience, and then goes off to work somewhere else and ...you've got their family emailing you saying, "You have changed all of our lives and I've never met you." I mean, does this have value? Absolutely. Yeah."*

Participant 4: *"I think it shines as a, as a training opportunity, as an opportunity for people to develop skills, um, that would be transferable to other workplaces. Um, so that's first and foremost. Now, the business piece is still important, because there's still tangible targets, there's still, you know, we'll talk about sales targets, we'll talk about, you know, um, how many units we sold, all of those kinds of things. And I think that's important, especially if you're looking to train people to get into other employment settings, right? To get people comfortable with, with those things."*

## 2.2 Flexibility and agency

OneLight not only offers flexibility and encourages agency, but they also actively support employees in becoming self-aware self-advocates for the supports and flexibility they need to do their work.

If not feeling well or needing to prioritise health or self-care, employees are encouraged to take the day off rather than trying to force themselves to come to work. As we've heard in other case studies, this can mean less time away from work than if they had to force themselves to push through and perform regardless of their own wellbeing. When employees feel safe to ask for that flexibility, they can self-manage their energy to deal with the impact of their disability, which results in a shorter recovery time.

Participant 2: *"The biggest things that I see, especially through the OneLight, is employers have to be compassionate, empathetic, flexible. Yeah, that's pretty much it... The flexibility is fabulous down there... [it] was really like nothing I've ever seen before."*

With respect to agency to ask for accommodations, participant 4 pointed out the following: *"I mean, it is a supportive work environment, ... Let's say this thing goes away tomorrow. [M]y goal would be that the people that are here would be able to continue employment in another setting, and continue to be employed successfully based on the things that they learned here, not only about working for an employer, but also what makes them successful. What do they need as an individual to be successful? And to just kind of empower them to advocate for themselves if they get into a situation where they can say, "Hey, you know, like, I'm, I'm not very comfortable with this, but would it be okay if I did it this way?" Because that's one of the things that I think is absolutely fantastic, is just the way people have modified their own thing. It's not like the management team is coming up with all these modifications. People have found different ways to do things on their own, um, that end up making them more productive. So to me, that's a huge win, when you start recognizing what you need as an individual to be successful, that's so cool."*

Participant 5: *"Well, for people that are aware of themselves and aware of what their abilities are and aware of what their abilities aren't or how they react to situations, you know, this is a very good, uh, platform to start off on because you're gonna learn, like, a lot about how, like, what's frustrating to you, what's not.... Not everyone feels the same way of course, but yeah. This is a good place to, like, learn acceptance of other people's, uh, barriers and, um, likes and dislikes or what not."*

*It's, like, it's one of the best places I've ever worked for sure... Probably the best place. And yeah, self awareness, that's a big thing. And I don't think that enough people have enough self-awareness..."*

In addition, the processes and strategies are revisited and changed if another approach is identified for experimentation, allowing flexibility in approaches to the conditions of employment as well as for the how the employees work.

Participant 1: *"I think it's part of that trampoline effect that there's room for creativity, um, and it's not so formulaic and, uh, prescriptive like so many other programs that relate to employment for people with disabilities... [T]hat's all a part of the ecosystem. It has to be flexible. It has to be experimental. There has to be risk and there has to be, uh, room to fail."*

### 2.3 Communication (not always verbal) and psychological safety

Communication skills and norms are included in training and are modeled by leadership, who are open to conversation. If supports or modifications are needed, it is just a matter of having a conversation with the managers. As Participant 2 noted: *"there's times when a boss can be a little bit intimidating. This wasn't the case at all. They took the team training with us. They did all the role playing with us. They were on the same playing field. So now they're, the supervisors are very open to just conversation. If you're having a problem, you can talk to them."*

Participant 2 further notes that: *"The other workers, if they notice something, they'll go and speak to the supervisors, and they'll, they'll come down and talk to the person."*

OneLight has established norms of communication reminding makers of what is important in the workplace – given the light manufacturing setting, there are physical reminders of how to operate machinery and observe safety procedures. There is also explicit communication and reiteration of tasks in meetings, with written instructions displayed at workstations.

This is also seen in verbal and interpersonal communication with employees, modelling how to advocate for self and take care of self. The culture of OneLight fosters psychological safety to ask for help, share when things are rough, or offer help to others. The organisation holds monthly meetings to celebrate wins and successes and discuss what is challenging.

Participant 3: *"Because every single person in here, um, you, you know, myself probably at the top of that list, has days where, where they need help and has, you know, time in those exact same days where I'm here to help other, other people. So, you know, have, having that, that that comfort for everybody, um, is definitely important."*

*[A]nd then it also goes through a lot of communication of ... is there any part of this job, you know, this this task that we need to go over again? Um, is there any part of this task that, um, we can do to make it easier? And so there's just kind of this constant communication."*

In addition to positive communication, we heard there is also an absence of negative communication. This shows up as not pressuring people, but rather looking for ways to support them; rather than talking down to someone for not having done much work, look at what is getting in the way of them doing more; i.e. coming from a strengths-based perspective and looking at how to remove barriers.

We heard that this happens by moving the focus from individual achievement to collective achievement and communicating support for the overall organisational mission. For example, Participant 4 mentioned the importance of *"...not putting pressure on your fellow coworker. Um, teaching people to naturally look to, to create supports for other people.... because I think a- at the end of the day, it has to come from the frontline. Management can be all a- all about it, and management can have great training, and whatever else. But it's*

*the frontline employees working together that are gonna make it successful or they're gonna break it. ....but seeing the end result of the actual culture that was built here, walking into a culture that was already established, um, that was one of the things that k- I, i- it just kinda threw me for a loop, a little bit, just seeing that level of positivity. I mean, people would have individual struggles, but I didn't see anybody taking a shot at anybody. Um, there was just, everybody was very supportive of everybody, um, there'd be a suggestion of, "Hey, have you tried doing this?" Um, but never, never anything negative, never a, "Oh, you only made 20 today," or, y- you never heard that. That, that's just, just, it doesn't happen. Um, and I think that's a testament, um, t- to the team training that had taken place to, that really prepared people to work in a truly inclusive kind of environment."*

## **2.4 Champions in leadership positions can drive culture and inclusivity through the whole organisation**

As a disability support organisation, inclusion Powell River has strong values that attracts champions for inclusion. Specifically, for OneLight, the director of the project applied for the funding and was involved in setting up the pilot, was identified as a champion of culture and inclusivity, and set up training for this approach expand the culture throughout that organisation.

*Participant 2: "I think our champion is [the director]...She, she has been amazing from the start, and she, she's the one that's really instilled in everybody, you know, we're all human and we all have lots to give. And let's just appreciate the different things that we can all give."*

*The biggest things that I see, especially through the OneLight, is employers have to be compassionate, empathetic, flexible. Yeah, that's pretty much it."*

The focus on inclusivity and inclusive culture is evident in comments across the respondents.

Participant 2 said *"it's very much not just a, a two-tiered supervisor/employee kind of thing...we're just one big, um, group, cohesive group."*

Participant 3 noted that: *"...I think some of what we're talking about is, is definitely set up in a management level as far as, like we talked about the posters on the wall, what we do, who we are as our core values. But once you set people up with a certain culture, it happens for itself. Like it is something that is very, very natural and, you know, keeps happening."*

Participant 4 felt that the culture was more important than specific accommodations: *"It's not about accommodating people, it's about improving your workplace culture. And I just can't see how i- it wouldn't improve a workplace culture to take some of that negative competitiveness out of there, to stop, you know, looking at what the guy beside you is doing. I- it's just basically teaching people some empathy, teaching people to, you know, take into consideration what might be going on with that person, maybe they're having a bad day. We all have bad days. We have days that we come into work and we suck for eight hours. And we're like, "Wow, I can't believe I got nothing accomplished today." And having somebody point that out for you is horrible, regardless of who you are, regardless of, of whether or not you identify with barriers. ...I think by doing those things, ultimately, I think the production takes care of itself. Having happy employees, having low turnover, having high retention, those are all huge, huge cost-savers, right? So s- sometimes it's not all about making more money and producing more, sometimes it's saving more on the backend. Right? Um, so I, I do think that there- there's a place for this, um, in a lotta different sectors, um, that will end up improving your bottom line. Is it gonna necessarily improve your, your revenue? Maybe not. But is that small*

*dip in revenue gonna be more than made up for, and the savings that you, that you basically realized on the backend, probably. I, I honestly think it would”.*

Participant 5 noted the importance of the code of conduct at OneLight: *“You're not gonna get fired from this job. Unless you're, like, really out of hand and not, not cooperating or being rude or not, uh, following the code of conduct that we have here at One Light, which is to treat everyone as best as you can, not, not be a jerk to people and not talk to other people or not, you know, belittle people or whatever it is.*

Participant 5 further noted how revenge procrastination can show up in toxic cultures: *“... 'cause if you're stressed out at work, you hate your job, you're not a happy person, and you're not really that productive in the first place...So you're probably gonna be just, you know - fluffing off, doing whatever you feel like or on your stupid cellphone or talking to someone on Facebook or whatever it is. Who knows what people do, right?”*

## **2.5 Meet people where they are**

OneLight’s commitment to working with the whole person is evident in how they adjust work tasks, location, and supports based on needs and strengths. They don’t require that everyone does the same job to create the same output. The culture is set up to respect the whole person, appreciate the whole person, and appreciate the strengths and skills of each person.

Participant 1: *“And so that's a really important piece of One Light, is that everyone's contribution is valued. And that is missing, we believe, from, from our, the world of work. (chuckles) That people do not feel valued for their contribution, uh, whatever that contribution might be. Um, and so that's, that essential.”*

This willingness to engage in job crafting means that employees/makers have opportunities to grow and learn skills. In addition to employing people living with disabilities, OneLight also employs people with multiple kinds of barriers. There may be people with mental health conditions who could be supported through VCH, or single parents, or people who are newcomers to Canada, because the employment context and environment is attracting these workers to the project. Participant 1 noted the intersectionality of barriers to work.

The concept of meeting people where they are and respecting the whole person is conveyed initially during training and then reinforced via job crafting and task modifications. With respect to the training, Participant 2 noted that *“...included in the team training was lots of, of things like that, understanding that we're all different, that we all bring, I think the term was gifts to the workplace. And we had to talk about what we thought our gifts were. Um, and like I said before, all the supervisors were there at the team training as well.”*

Participant 3 mentioned the different capacities or desires for duration of work: *“[N]ot everyone has the ability to focus on something for more than four hours, for their body to be in that position for more than four hours. But it doesn't mean that they don't wanna do it, they just don't wanna do it for seven and a half, eight hours, right?”*

Participant 1: *“And all of our social enterprises have adopted a pi-, at least a piece of that vision, that value for contribution. Yeah. That everyone matters and everyone is, is a part of the, the team.”*

Participant 2: *“Like I said, I really think that team training was a brilliant way to start that, and it opened us up to, to everybody's gifts that they have and to know that your 100% is not going to be the same as his 100%*

*or her 100%.... And even though it wasn't everybody had to produce the same, you had to give kind of your 100%, whatever that was, it's, it's not always easy for everyone to be able to understand that and to realize it's okay."*

Another aspect of meeting each person where they are is being flexible to what the individual wants to achieve – being aware of what 100% looks like for each employee. What goal are they are aiming for? Is it coming in a certain number of scheduled shifts? Is it making a certain number of OneLights? This is where meaningful work can be found for the individual, and where there are potential negative effects of pushing people beyond their capacity or where they feel comfortable with working.

Participant 4: *"And if you're working within your own capacity, then you don't feel that stress, right? You know, what's, what's success for you today? Um, and as long as we're consistently, you know, allowing people to work at their individual peak capacity, um, depending on their, you know, circumstances that particular day, uh, I think that's what makes it, what makes it kind of, um, successful, and that's what allows us to achieve those targets."*

*...I think meaningful work ... it's entirely up to the individual, right? I mean, some people find fulfillment in repetitive, simple tasks. They thrive in that environment. It's my nightmare, right? Like, for, for me as an individual, that would be my nightmare. But for that individual, that's what they thrive in and, and that's what gives them fulfillment."*

*Now, the other thing is, oh yeah, we give people the opportunity to be able to take on more. Right? And I think that, that is a key part of, um, meaningful work, is having the opportunity to make progress, um, and to learn new skills, and to, um, be able to apply those skills and know that they, those skills might be transferable. So to me, tha- that would be goal for, for kind of meaningful work."*

Participant 3 noted the positive side of individualised approaches to job crafting for different strengths *"I kind of realized that if you hire people that you simply, um, connect with and that you understand, it makes your job so unbelievably easy because you're manage, you're managing them the same way that you would wanna be managed."*

*But what a flat group of people you would have as far as, you wouldn't have the, um, you wouldn't have this well-rounded team of everyone bringing in different strengths, of, of, um, of everyone being able to support each other because everyone's so similar. Right. And so it kind of, when I, that, that was a real interesting learning curve for me, is kind of looking at, um, a, a, a bigger picture and challenging myself as a manager to figure out what each person needs for success. Um, what each person is kind of looking at for, um, feeling valued, um, and how much information someone needs to kind of move forward. And kind of that I was the one that needed to change, um, and to look for something a little bit different."*

*So that was something that happened with me prior to coming to One Light. Um, the thing about my past experience is that I was still, even with that, hiring someone to do a specific job. One Light, we hire the person and then we're able to tailor the job to fit the person. So that is completely new to me, um, and is probably my favorite part of the job. Um, 'cause it's something I didn't have the ability, well, maybe, I don't wanna say I didn't have the ability, but at the same time I also did the numbers and it's, it's a tricky answer for me."*

When asked what could have been better at OneLight we heard that there is no one-size-fits-all answer to this question:

Participant 2: *"Oh, that's a really hard question, actually, because to me, um, to say that something could've been done better maybe would've worked better for me, but it certainly wouldn't have worked better for the other 15 people. And what might've worked better for the person next to me certainly might not have worked well for me. So I don't think there was a lot of things they could've improved on."*

*"So you know, I think they did everything humanly possible, and I think that's what's great about having those four supervisors too. Because they were both so diverse in so many ways with so many different backgrounds that with all the different things that would come up with the group of 25, and I'll tell you, that was a pretty diverse group, um, I think they did a fabulous job."*

Participant 5: *"This is the best job I could ever hope for and with my, the situation that I'm in. ...But a four or five hour shift is about w- kinda a perfect range of work capacity. I start to get a little irritated and my energy levels will drop after about four or five hours."*

## SOLOPRENEUR CASE STUDY

### SECTION 1: BACKGROUND

Interviews: 2 Interviews

Documents Reviewed: Website, NIE Environmental Scan Survey

#### 1.1 Participant Information

Age	Gender	Ethnicity	Disability Type	Close to Disability	Citizenship	Role	Time with Company
48	Cisgender Female	White	Physical	Family, friends	Permanent Resident	Leadership	9 years
38	Non-binary trans man	White with French Canadian and Ashkenazi Jewish Heritage	Physical, cognitive, neurodivergence	Friends	Canadian	Leadership	just over a year

#### 1.2 Employment Setting

Both solopreneurs operate for-profit business that serve clients across Canada. Both work alone with no hired employees. Both identified disability inclusion as central to their business.

The Creative Good offers 1:1 and group educational services online with creators, who “have been most impacted by patriarchy and other oppressive systems”. The Business aim is “for us to live better, more fulfilled lives through the realization of creative practices that are generative, sustainable, and liberatory”

Crows Nest Organizing offers professional 1:1 or group-based home-organization services (education and co-working supports). They specifically market to ADHD and other neurodivergent persons. The business is described on their website as:

“Crow's Nest is a judgement-free service that works with people to help them feel less overwhelmed by physical and virtual clutter. Everyone is welcome, and we specialize in working with clients who've struggled for years or even their whole lives to stay organized. If that describes you, you're not lazy. You're usually working twice as hard to stay on top of things and have tried over and over again to make lasting changes. Long-term disorganizing often happens because of unmet access needs.



### 1.2a) Roles

Both solopreneurs offer education and practical strategies and supports to individual and group clientele. Both are seeking to offer accessible supports that benefit others like them.

### 1.3 Diverse Economies

The Creative Good offers pay-what-you-wish and pay-what-you-can options as well as payment plans.

Crows Nest Organizing offers fee-for-service supports, and offers sliding-scale opportunities for Black, Indigenous, and Trans-identifying clients. The group supports are intended to offer a lower-cost support system for persons who may not have the resources to hire 1:1 support.

#### 1.3a) Finance stack

N/A

#### 1.3b) Business growth

Both Solopreneurs are managing a balance of making their businesses more sustainable while also offering accessibility for clients.

“As somebody who does those things, um, you know, we are often not clear about how we are being resourced to be able to do those things, right? 'Cause it's not easy to be resourced enough to be an artist or to do your own business or whatever. And often, it is because another family member is s... un- under- underwriting it, right? (laughs) So, that's definitely the biggest resource that I had, was that.”

“So I know how to do my job where I work with my clients, but everything else has been a really steep learning curve and it was really hard to find accessible resources, and I think it did impact my ability to find funding. I ended up funding my business off of personal line of credit, rather than a business loan, which wasn't ideal, but it was wh- the only thing that was really accessible to me at the time, and I don't know if I could've done this without having had my own good credit.”

### 1.4 Inclusion Support

Both solopreneurs spoke about a need for more practical, logistical, and financial supports and that having these early on would have most benefitted their success as solopreneurs.

“The major issue for me was that everybody needed a business plan, which is reasonable, but nobody had- nobody had, like, a, uh, like, wh- it- it was really hard to find, like, actual, like, human to human support building a business plan.”

“and in terms of, like, grants for the work I do, I have had a quick look, I do not qualify because I am a for-profit business. And my- my impression with disability-based grants is that I am not disabled enough. Like, you basically have to not be able to do any other work to qualify for the ones I found, and that's not my story either. I have a steady employment history.”

"I'm at the point now where I would really just love, like, a mentor, someone I could talk to and just be like, "Hey, I'm feeling stuck on this. Help me think it through." A lot of the time when I verbalize it, that's solves the problem, I don't even always need someone else's input. Uh, but that's not the kind of programming I'm finding, everyone is tied to funding."

Additionally, both solopreneurs spoke about the benefit of peer support and mentorship.

"I was looking for other people that were modeling ways to be in business and to not always be well, or to have disability."

"I would love to have a better connection to other, like, radical entrepreneurs, uh, it's just hard to find them. Online, it's easier... but in person, it's rough."

### **1.5 Inclusive Values**

Both solopreneurs spoke about inclusive values grounding their business and practices within, and ways in which they modelled these values with clients.

"But then within that overall system, there's also, like, pause mode. Like, when d... when do we hit pause, um, how do we take intentional rest. So, that's like one example of, like, a liberatory practice being built in. We do things like, um, in the la... la... I do like little lessons on different things, and so they- they'll be included in the lecture. So, you know, I did a seasonal workshops, and so we talk a lot about decolonizing time in that workshop, and how the benefits of being closer to nature, et cetera. So, there's... It's just kind of baked in all over the place."

### **1.6 Processes/Conditions that Support Inclusive Practices**

Both solopreneurs spoke about the fact of being a solopreneur in itself created a condition that allowed them to be more inclusive of their own needs and strengths.

## **SECTION TWO: "POINTS OF CONNECTION"**

### **2.1 Commitment to social purpose and/or social justice, or at least questioning model of conventional workplaces**

Both solopreneurs spoke about how their businesses were grounded in a commitment to social purpose and social justice.

"When the pandemic came, the business shut down, and then it became just my own business and very much changed to really add that elements of doing feminist and justice-based work within the business as well."

"I feel like the thing that moved me to this direction where I felt capable of doing this business and, uh, trusting myself to do it was actually... racial justice work is actually what got me started."

Both identified experiencing discordance between their personal values and prior workplaces within which they had previously been employed, and how much this had contributed to their struggles with employment.

"I feel like I'm just starting to recognize, too, how much value to misalignment was an issue for me, that autistic and maybe neuro-atypical in general thing where we, like, feel, like, justice really strongly. Um, I really struggled with that misalignment in my corporate job. Um, and even before I kinda got radicalized, like, when I started working that job, I still was like, "Capitalism is fine, it just needs to be reformed." And I have... no, (laughs) not anymore. Uh, so getting more and more radicalized, I think, and, like, m- more and more leftist over time, I think really aggravated that and I think I can, looking back, I can recognize the toll that took on me, that dissonance, cognitive dissonance took on me, um, both in terms of, like, the work I was doing, and both what people around me were saying and doing. "

Additionally, both spoke about the challenges of meeting the ableist demands of traditional workplace environments prior to becoming solopreneurs.

"It felt like a constant game of, "How can I hide that I'm not productive like I'm supposed to be?"

"Like, I'm so, so aware that I could not work at a regular job. There's just no way. Um, and I also reflect on how wild it is that I can still run a business, have a creative practice, have a full life. I do have all of these things while it not being symmetrical or regular. Like, it's really based on what my body has decided to do at any given time. Um, so it's wild to me that I could be, like, you know, a productive member of society at work, but the accommodations likely wouldn't have been made for me to be out there doing that kind of... a- anyone else's work, so it really... I'm so grateful to have self-employment because I don't think I would survive out there."

"I feel like the expectation around productivity is you come into your desk or you log in from home or wherever you're working, and you work steadily from X-time to X-time. And obviously, you can take water cooler breaks, you should take your lunch break, all of that kind of stuff, but there is kind of this expectation of steady ongoing work, and that has never really been something my brain does well"

"Even just, like, my own internalized ablesim, and my beliefs about what I think I should be able to do and what's, like, normal. Like, that... Intellectually, I know so much more than I ever did now, but, like, still trying to, like, make that match up, right, is really, really challenging. Like, I catch myself all the time, thinking, like, "I should be able to do this," or, "I should be able to do that." And, and all of that kind of a generalized ableism and all of those things, like, I've had to really, to actually show up for my work, I have to tend all those things."

## 2.2 Flexibility and agency

Flexibility and agency in work method/mode was noted as a key benefit of being a solopreneur, and one that prompted a move away from traditional employment.

"So, one of the things that I do in my business is that everything is by season. So, um, there's lots of reasons for that, and one of the reasons is is that when we start to decolonize time and think in terms of seasons, then we're stepping a little bit to outside of capitalism, et cetera, so there's, there's all s- sorts of things there. Um, but for me, it also means that I have clearly times of year when I know I'm doing my intakes, and when...

And so I can really go, okay, this is the time where I have to really try and be prepared for that, like, you know, push, um, and then I can pace myself throughout the rest of the year. And so, by only doing the intakes and new offerings to the seasons that I really know what I'm in for and can really have that pacing. Um, so that's one, one big thing of how I run the business. And it's taken me some trial and error to figure out the best ways to do things"

"If I... I haven't really done my finances, I'm just gonna hand my accountant, or my bookkeeper, everything. And I... that's okay, I can make that decision, that doesn't have to be part of my job responsibilities, I can just throw money at it. Yeah, and if I'm having a day when I really just can't focus, uh, it's fine, I don't really have to. I can just take the pressure off myself and if I get things done, great, and if I don't, I don't"

### **2.3 Communication (not always verbal) and psychological safety**

Both solopreneurs spoke about the value of themselves being in the leadership roles, and not having to communicate or mask themselves in communication with others in leadership positions.

"I don't have to manage my coworkers' or by boss's expectations around who I am as a person, because that I am my own boss and coworker. I think it will take me... I think I- I think I am less likely to burn out in this role, but I might anyway. Like, I might... this- this does have- this could be a hyper focus, and maybe in a few years, I'll be like, "No, I'm done with this," but I will also have the freedom to move on."

"I'm still allowed to be seen even when I'm unwell, and there's so much about, like, having to, like, hide being unwell, um, because shamed of showing up unwell, all of those kinds of things. So, I think it's just also, like, being able to be met where you are, and to be able to, like, show up however you can show up"

"Disabilities and illness are still considered just, like, to be so shame-based, right? Like, oh, this is something that has to be hidden or kept from people. And it's like, being able to actually say what somebody needs and what they're, what they're dealing with, is like, huge, right? "

Solopreneurs also spoke about how they modelled psychological safety through their communication with others.

"It just really does reaffirm that this is where I want to be, um, 'cause also, like, eh, it gives me grace, too, right? Like, if I get overwhelmed and forget to reply to an email for a week, other ADHD-ers are gonna go, "Yup, sounds about right," whereas people without disability is gonna look at that and go, "Well, that's so unprofessional." Also, not masking is awesome, or masking less at least, awesome."

### **2.4 Champions in leadership positions can drive culture and inclusivity through the whole organization**

Both solopreneurs spoke about their role as business owners and how they drive culture and inclusivity through their own organization and through role modelling.

"I also really try to model it in my, in my business, and, um, somebody is in a kind of leadership with my people, is that, you know, lots of people have chronic illness of some kind, disabilities of some kind, and that's, like, really helpful, actually, to have somebody that can model that for them so they know what then, you know... So, um, all of my participants and students know what my boundaries are on time and how when

I'm gonna get back to them and how often can I show up, and I'll fully show up when I do, but they also know that I have other times where I'm not gonna be available. So, there's, there's, there's so many things. Those are some of the things off the top of my head."

"All of my participants and students know what my boundaries are on time and how when I'm gonna get back to them and how often can I show up, and I'll fully show up when I do, but they also know that I have other times where I'm not gonna be available."

## **2.5 Meet people where they are**

Both solopreneurs spoke about their clientele and ways in which their business model allowed them to meet people where they are, by encouraging people to look at the impacts of broader systemic structures on their current experiences.

"To help the folks that I work with realize that what they've often, um, labeled as a personal, um, problem or failing is actually a collective issue stemming from all these various systems of oppression. So, things like perfectionism or visibility, like, and, and trying to help see where that's actually not a personal problem in their creativity, right? And so, that comes up over and over again with the folks that I work with. So, I specify that I work with folks who have been most impacted by patriarchy and other problems of oppression. And so, you know, we're working with, you know, people that are burnt out by capitalism and then beating themselves over the c... uh, about not getting the creative practice down, and it's like, well, look at the system."

"You're usually working twice as hard to stay on top of things and have tried over and over again to make lasting changes. Long-term disorganizing often happens because of unmet access needs."

## NORTHERN LIGHTS ESTATE WINERY

### SECTION 1: BACKGROUND

Interviews: 6 Interviews

Documents Reviewed: Employee Handbook, Website

#### 1.1 Participant Information

Age	Gender	Ethnicity	Disability Type	Close to Disability	Citizenship	Role	Time with Company
43	Cisgender Female	White	None	Family	Canadian	External support	Several years partnering with NLEW
24	Cisgender Female	White	Learning	Friends, coworkers	Canadian	Front line (seasonal)	2-3 years
25	Cisgender Male	White	Physical	Friends, coworkers	Canadian	Front line (seasonal)	1 year
45	Cisgender Female	White	None	None	Canadian	Leadership	9 years
32	Cisgender Female	White / Indigenous	None	Family	Canadian	Leadership	5 years
61	Cisgender Male	Indigenous	Learning disability	Friends, coworkers	Canadian	Front line (seasonal)	2 years

#### 1.2 Employment Setting

Northern Lights Estate Winery (NLEW) is a winery located in Prince George, B.C. producing fruit wines with gooseberries, raspberries, apples, rhubarb, black currants, cherries, and blueberries. Founded in 2013, NLEW has experienced significant growth, with about seven to eight thousand cases of wine bottled yearly. The winery, which includes a bistro, is on the banks of the Nechako River near downtown Prince George and maintains growing facilities elsewhere near the city. NLEW is both the most northerly and the largest fruit winery in B.C.

The stated organizational goals of NLEW are “to make everyone’s day a bit better than before they experienced us. We want to have the largest impact on the community, by making the smallest footprint on our environment.”

##### 1.2a) Roles

NLEW has approximately 30 year-round employees across all operations, with this number rising to about 100 during the high season for increased picking and processing, as well as for weddings and other special events in the summer. For eight years the winery has cooperated with a local disability support organization, AimHi, to employ client workers with disabilities to work as berry pickers during the high season.

### 1.3 Diverse Economies

NLEW is locally owned by Family Fast Foods Ltd., which operates Wendy's and Hoppy Brews in Prince George. While not all the fruit used in the wines is grown by NLEW, all fruit is sourced from B.C., with a preference for local growers. The winery is committed to sustainable agricultural practices. Pesticides and fertilizers are largely organic, and the water conservation efforts have been put in place. NLEW's wines are vegan. In cooperation with UNBC, the winery has examined its carbon footprint and achieved carbon neutrality through purchasing offsets.

#### 1.3a) Finance stack

**NLEW has annual revenues of approximately \$1.6 million yearly. There is no profit-sharing scheme for employees, though some employees are shareholders in the company.**

#### 1.3b) Business growth

NLEW has experienced rapid growth since its founding, increasing the demand for seasonal labour. Fruit pickers with disabilities have made a small contribution to filling this need.

### 1.4 Inclusion Support

NLEW partners with a local disability support organization, AimHi to recruit, provide transportation for, and include workers with disabilities in picking fruit. AimHi provides most of the inclusion support, beginning with recruitment through Ready, Willing and Able, as Participant 1 explains: *"They'll send out an email to any of the partner agencies that are connected. And they will let all the partner agencies know about a specific job opportunity. So, Ready, and Willing and Able kind of come from an, kind of like from a national perspective. And that's how they are kind of connecting with the different employers, but from a higher level than, like say, we would just coming in off the street and applying for a job somewhere."*

Ready, Willing and Able provides financial support for workers to travel to NLEW

AimHi then supports workers on-site as needed. For most clients, this does not mean constant support but rather supervision by NLEW supervisors as would be the case for all pickers. Nonetheless, the initial support work needed for each worker for a relatively short period of work (a few months at the most per year) is considerable:

Participant 1: *"it's a lot of coordinating [...] and then paperwork through RWA and then monthly paperwork for all the mileage reimbursements, and then if we're gonna be out here on site. So that's why we love that they have a supervisor here, because if they said, "Oh, well, they're not gonna be supervised at all." Some of our people might not have the opportunity, right?"*

*So we would probably look, be looking at funding for, to have staff out here the entire time if that was the case. But especially people that are returned berry pickers and stuff, they don't need us watching them pick berries all the time if there's another supervisor on site that they're comfortable with. And that's why we always come for at least the first week or so, just to make things are running, running smoothly, but we can always pop back out at any time and stuff as well. "*

This enables NLEW to dedicate minimal resources of its own to inclusion, as participant 4 explains:

*“because they're supported by their job coach and it doesn't give us a lot of extra work [...] we're more than happy to give as much opportunity to any, as many individual that they can provide.”*

NLEW's full-time farm employees do receive some training in inclusion support originally spearheaded through AimHi, though it appears this has been minimal, according to participant 5: *“[A local autism trainer] did a, a little kind of workshop sort of with us, to try to give us an idea of what it is like to process things, and what it's like to have autism. And that was really beneficial. I would love it if they could come back and do that again. And I thought it was really, really great.”*

## 1.5 Inclusive Values

NLEW states in their employee handbook that they seek to be “inclusive not exclusive” and refer to fair employment practices as they relate to non-discrimination against disabled persons, as well as the relevant principles of the BC Human Rights Code. Participant 4 highlights this as an important representation of the winery's inclusive values: *“We're not supposed to discriminate, according to gender or ethnicity or disability if we are going to employ someone. But we're really standing behind that statement. So we are trying to have, uh, to bring as more, much diversity in our employment to pool.”*

Participant 1, an AimHi employee, supports this statement with observations from practice: *“I think they, the main thing is that they just don't treat any person with a disability any different than they would a non-disabled person. They, they have all sorts of different employees. They might have employees that English is a second language, that type of thing, right? You just, you just still show them how, how to pick the berries and where to come to weigh the berries and that type of thing.”*

As does participant 5, a farm manager: *“I think the biggest thing is Northern Lights is very big on everybody being very friendly and very welcoming [...] they're very good at hiring in that sense I think, because we've never had an issue with somebody being mistreated [...]we come at it from a very, just a very friendly perspective [...] we're just trying to make everybody feel really comfortable.”*

NLEW aspires to expand inclusive hiring and employment to other departments (for example, the bistro) but noted multiple barriers to actually doing so, for example managerial discretion, physical intensity of tasks (for example carrying cases of wine), and additional costs due to training.

## 1.6 Processes/Conditions that Support Inclusive Practices

AimHi performs integral background support to enable workers with disabilities to participate in the workplace. For some, this means training before the work begins on appropriate workplace behaviors. For others, this can mean part or full-time support through a job coach or personal assistant. NLEW supervisors provide friendly workplace oversight, as described by Participant 3: *“They say, “How you doing here? How you doing?” and show how them how much in the bucket I have.”*

And participant 5: *“we'll just kind of check up on them, like walk up and down. Sometimes I'll pick with them, depending on how they're doing and stuff. And I just try to basically give them the best tips on how to pick. Like if I notice that, like they're doing something that might make it faster, then I will come up to them and help them, I suggest a better way that they could do it a little quicker, 'cause the faster they pick, the more money they make, 'cause they are paid by the pound. When they do fill their buckets, the supervisor is the*



We want to have the largest impact on the community, by making the smallest footprint on our environment. *one who weighs it. They record all of the weights during the day. And then that's what they're able to get paid properly. So we make sure they have somebody stationed at the scale."*

*Supervisors from NLEW also attend to issues of workplace safety and worktime. Participant 1 elaborates:*

*"And they have no problem with his staff coming out with him and sitting on, sitting on a bench somewhere and just kind of overseeing and being here to help him with his tube feeding at lunchtime and, and that type of thing. They have no problem with whoever, whoever wants to be out, whoever needs to be out, that type of thing. They're very inclusive."*

The physical conditions of a farm are rarely inclusive but NLEW has made efforts to improve the accessibility of the workplace for pickers. The ground at the farm is reasonably flat and uniform, and the rows of berries are wide. This space is likely be accessible for most people with physical disabilities, though some parts of the farm and bistro are not.

Participant 6 describes this: "Yeah, the terrain is pretty good. There was a couple spots here it flipped up. Um, walking through. But, I mean, it's soft ground and stuff like that. But for the most part, in between, where they had the walkways, you're able to bring your walker in and you actually got to use it to sit on."

NLEW pays all pickers the same, unsubsidized piece rate but strives to be inclusive and equitable by paying a higher rate than mandated by law: *"I mean, there will always be slow pickers and there will always be faster pickers, but the average picker, um, should make minimum wage. And yes, this, it's 10 to 15 and more times then the, the baseline that the government is giving."* (Participant 4)

## **SECTION TWO: "POINTS OF CONNECTION"**

### **2.1 Commitment to social purpose and/or social justice, or at least questioning model of conventional workplaces**

NLEW describes their organizational goals thusly: "We want to have the largest impact on the community, by making the smallest footprint on our environment." In the employee handbook, the organization seeks to challenge some facets of traditional Canadian workplaces, for example stating that they seek to "be progressive but not righteous," "be professional but not prestigious," "be funny but not a joke," and "be formal but wear jeans."

The winery is locally owned and operated by a family with deep roots in the community. The Bell family has been involved in local and provincial politics, as well as a variety of local business ventures and non-profit organizations. Family Fast Foods has donated over \$500,000 to local charities.

Participant 4 spoke to the motivations of the Bell family to found NLEW and to the purpose of the organization in the community more broadly: *"They really wanted to build something for the community [...] Not necessarily just for them, but have an impact in the tourism of Prince George and being able to be an*

*employer. And to just to elevate the experience that everyone has in Prince George. Because as you might know, Prince George doesn't have necessarily the best, um, um, reputation. And by building a winery, it would just elevate, the life of everybody in Prince George are so proud of having a winery [...] people when they come here, we're a number one tourist attraction."*

The farm site includes a stage and terraced rows of seats that go uphill from the stage. This space is used for viewing performances, weddings, and films. Participant 4 elaborated that *"This whole community that, and I don't know if those individuals come and participate in the Light Up the Orchard or like, or agri-tourism events, but then they, they're proud, they're probably proud to say that they contribute to this organization that provides such a good experience to the community."*

## 2.2 Flexibility and agency

The workers with disabilities at NLEW pick fruits and berries several months of the year, giving them some flexibility and agency as employees. Pickers are seasonal contractors that are paid at a per piece rate. They can decide if, how much they work, and, within the season, at what times they work during hours that supervisors are present. This flexibility was universally lauded by pickers and the support worker interviewed for the case study. Participant 1 notes that: *"Somebody might sign up for berry picking and then something happens with their health or their mental health or whatever, and they're not able to commit to it. That's okay. It doesn't mean it's gonna hurt their chances for next year or anything. Whereas with, you know, some, just, you know, general employers, you know, 'Oh, that first situation didn't work out very well. Okay, well I don't think it's gonna work.' Right? Whereas, you know, we have people that, you know, might take a season off and then they come back the following season and it's just, they're, they love seeing people return, but they also love seeing new faces out here and stuff as well, right?"*

Workers with disabilities mentioned how the flexibility can serve a wide range of needs in their lives, ranging from career progression to life quality:

Participant 2: *"I do want a job, but I want to start off with part-time [...] And, work up to full-time."*

Participant 6: *"So we hold his shifts for this six weeks. And if the weather's bad, just so he can still have an activity-, he has the option to still come in for his shredding shift. And if he's able to come, that day he comes, and if not, then if, if weather was great for those whole six weeks, then he takes six weeks off shredding."*

Similarly, during worktime pickers can decide when they take their breaks. Appropriate facilities with shade and water are provided. Due to transportation costs (for example by taxi) being covered by Ready, Willing and Able, pickers have access to tailored transit to their worksite.

The cooperation with AimHi is integral to providing both flexibility and agency to pickers. AimHi staff often coordinate different work commitments (also internal to AimHi) with the seasonal work at NLEW. Support staff also inform and assist their clients with issues relating to disability benefits so that they can avoid having benefits reduced. This increases the agency of pickers at NLEW to decide how much they want to work.

The partnership with AimHi also gives NLEW considerable flexibility in hiring seasonal workers and agency in the impact it hopes to have on the community. Participant 4 explains that the partnership is characterized by *"easiness,"* going on to say that *"since they do all the pre-screening this is very helpful for us because it saves us time. And our ability or, eagerness to provide all the information to AimHi just made the partnership*

very smooth,” and that other businesses should know that *“it probably makes the process easier if you're going through an organization, uh, instead of trying to work, um, hire just in the regular way.”*

## **2.3 Communication (not always verbal) and psychological safety**

As noted above, AimHi is integral to assuring smooth communication between pickers and NLEW. AimHi acts as a go-between on employment issues, helping pickers understand contracts and workplace etiquette. Although farm staff have received some training in inclusive employment, the disability support agency provides job coaches and other staff to assist pickers at the beginning of their seasonal employment. Some pickers require constant support, for example if they have significant medical or speech-based disabilities.

AimHi also helps brief NLEW staff on pickers ahead of time, stated Participant 5: *“if I've never, if I hadn't met them before, she kind of gives me a little bit of an insight on what, what they're like, and how I can best communicate with them, I guess” and that “it feels really good to be able to make them, to, to be able to communicate with them on a, on a level that's, I guess, more, more professional.”*

The relational comfort in communication is respected by NLEW in their dealings with pickers, as Participant 1 explained: *“Well, people with disabilities, it might look like a different scenario or, you know, maybe they say, ‘Oh, well I prefer to just, you know, communicate with the person.’ Well, the person's gonna forget a lot of the things that you communicate with them. So we would actually prefer that you communicate with their caregiver that picks them up every day.”*

Supervisory interactions were universally described as positive by interviewed seasonal pickers. Communication with seasonal pickers with disabilities has little difference to seasonal pickers without disabilities – the same procedures and training are utilized for both groups in an inclusive manner, with AimHi providing some additional support for workers with disabilities.

## **2.4 Champions in leadership positions can drive culture and inclusivity through the whole organization**

Both the Director of Operations and the Farm Manager were named as champions of the cooperation with AimHi and the inclusive employment practices of NLEW. The Director of Operations attends job fairs to recruit disabled persons, has advocated for other departments to begin hiring and training disabled persons, and acts as a primary contact for AimHi. The farm manager acts as an operational champion, assuring that supervisors are informed about pickers and can supervise them appropriately.

To the Director of Operations, leading on the issue of inclusive employment means aspiring to hiring more persons with disabilities, increasing the number of roles open to them, increasing pay, and creating opportunities for seasonal employees to move into permanent positions. Additional subsidies, public transit in Prince George, and awareness around government policies were noted as being significant external barriers to these aspirations.

## **2.5 Meet people where they are**

N/A

## JONI CASE STUDY

### SECTION 1: BACKGROUND

#### 1.1 Participant Information

Age	Gender	Ethnicity	Disability Type	Close to Disability	Citizenship	Role	Time with Company
33	Cisgender Male	South Asian	No	Family, coworkers	Permanent Resident	Leadership	Oct-19
30 - 35	Cisgender Female	White	No	Coworkers	Canadian	Leadership	a few months?
Late 40s-50s	Cisgender Female	White	Neurodivergence	Family		Leadership	3 years
38	Cisgender Female	White	No	Family, coworkers	Canadian	Leadership	13 months
44	Cisgender Female	Mexican, Latino, Canadian	Physical	Family, coworkers		Leadership	2019

#### 1.2 Employment Setting

Joni is a period care company, founded in 2019. The company is nominally based in Victoria, Canada, however most team members work completely remotely within Canada. One employee spends time in the office and warehouse on a regular basis. There are other jobs in warehouse/fulfillment, with outsourced warehousing in Vancouver.

In the past Joni has employed interns from University of Victoria, and a short-term contractor who participated with a support worker.

The regular team is currently quite small, with three full time workers, and two part time contractors. Two employees identify with having a disability (or at least a condition that reduces functioning).

##### 1.2a) Roles

- Two co-founders
- Operations manager
- Sales
- Content manager

### 1.3 Diverse Economies

Joni is explicitly a social enterprise, with a strong mission that is expressed through their product and their company culture.

*“But the purpose is social, so we call it social enterprise. Making sustainable period care accessible for everyone....”*

*“so, this has two parts; one, sustainable, and secondly is accessible. Um, because many times, companies lean on one or another. Uh, so, we, we make very conscious decision, even when we are sourcing any raw material or anything,”*

Joni operates a 5% giveback arrangement for not for profits. Their mission is to provide sustainable period care accessible for everyone. However, they are doing this through a business paradigm so will still need to at least break even.

The company is in the process of applying for B corp certification<sup>1</sup>, which is based on a score given at the point of qualifying. Every year after, Joni is obligated to increase their social benefit score, which means continuous improvement of the triple bottom line operations.

Participant 4: *“something else that we're very excited about is, um, we're starting to create our application to become a B Corp company. Um, and so, that's something again solidifies our commitment to people, the environment, and then profits. And I would honestly say that it's in that order. Um, uh, we're a business, so being profitable and, and again, paying our, you know, employees for their services is important, but not more important than the, the greater mission that we serve.”*

#### 1.3a. Finance stack

##### **Investment:**

They have investors, having raised about \$600 000 in total investment, so will need to make a return to those shareholders. The 5% giveback commitment serves as a screening device for values aligned investors. They have deliberately let go of investors that do not believe in or align with this giveback program.

Joni employees are also investors – most have between \$500 and \$1000 invested, but all will be eligible for an option scheme once it's financially feasible to do the legal work to set that up. They currently have 11000 unallocated options reserved for employees.

The finance stack includes applying for grants (about 4% to 5% of cashflow) for various aspects of the company operations:

Participant 1: *“these grants can come for R&D work, or project management kind of work, or hiring, uh, people with disabilities.”*

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<sup>1</sup> Designation as a B Corp means a company meets high social and environmental standards (and commits to improving their performance in those areas) in addition to pursuing financial success. The application process and designation is managed via B Lab, which assesses the company's performance on five major categories: governance, workers, community, the environment, and customers. It also looks at the overall impact. More information available from <https://www.bcorporation.net/en-us/>

### 1.3b) Business growth

The business is currently breaking even after a number of years of losses and growing rapidly.

Participant 1: *“financially, we are breaking even this year, finally. And, uh, (laughs), we are growing over, like, 130/40% year over year. Uh, this year, uh, uh, we were targeting about hun- \$450,000 in revenue, but we are somewhere around 650, uh, because of this regulatory changes and everything. So, which is a good thing.”*

Participant 2 notes they are *“also working with organizations, um, to work with like nonprofits or to work with businesses that are providing products that, you know, aren't, uh, nonprofits per se. Um, again, like looking at the details of it, they're so focused on price and cost. They want it to be accessible to people. They want it to be, um, you know, mission-driven, but they also are very aware that money makes it work. So, um, yeah, that's definitely conversations that we have frequently about making sure that, you know, costs are working and we're not losing money on something we shouldn't be. Um, yeah, that's definitely in the conversation.”*

Thus, Joni are not only looking to make financial sense to customers that might usually purchase from bigger brands that are able to compete on cost, but they are also making sure the products and profits are delivered to not for profits and charities. They are currently working with 20+ not for profits.

### 1.4 Inclusion Support

Much of their inclusion support comes from being inclusive by default, see 2.2 : leadership champions and 2.3: communication of that inclusion.

Apart from one instance of inclusivity training, there is not yet a lot of formal inclusivity training or formal codification of inclusion. The team is currently quite small and moving from start-up to scale-up phase of operations. As a result, so far there are no targeted efforts or specific hiring attempts.

We noted that previous employment had equipped some team members with the training and experience to offer an organically inclusive approach to interacting with people living with disability.

However, they have made a change to wording their job advertisements to make them more inclusive, as explained by Participant 1: *“Hey, even if you feel that you know some of these portions of the work, and you feel like you can learn while you're working, it's fine. Or you,” they are, like, with disability or anything, it's fine. Please apply. And so, making it, like more welcoming. And it, it helps us, like, build more, uh, applicant pool as well, uh, than won't be available to us otherwise.”*

Some discussions flagged a probable future change to the organic approach to training and documentation, for example, Participant 3 noted: *“even though, I like an organic approach, I think as you scale you definitely need, uh, a document, uh, for consistency. Um, something that people can refer to so that there's a, a process in place. And so that people might feel more secure in that, so that there are, that it is written down, that it is, it's not just lip service. That it's an actual document that maybe is a living document that gets adjusted as need be, but. To have it, have more of a, of a, of guidelines or a statement about it. Or not a statement, guidelines, uh, would be beneficial.”*

## 1.5 Inclusive Values

Joni's commitment to inclusive values are demonstrated through the entire supply chain and employment and business model, and such inclusive values may be influenced by the nature of company.

In addition, both cofounders related having grown up with or seen lack of opportunity or barriers to opportunity that had affected them directly or someone close to them. One cofounder identifies with having a serious condition that causes disability and loss of function.

These inclusive values extend to efforts to diversify their investor base. Joni targeted 80% of efforts towards attracting investment from women:

Participant 1: *" And so, we have put about 80% of our efforts into raising money from female-identifying investors. And we also did the Crowd Funding, so, net, like, a small investor. So, like, people who don't have, like, couple of million dollars in the bank, kind of, people can also, like, invest in, like, a small way. \$500, or \$1,000 in, like, a, this, kind of, like, a start up.*

*And frankly, we put, like, 80% of effort to get those 35% women-identifying investors. And we put about 20% up for, uh, if, up for someone, like, finding male-identifying investors, because, there are frankly a lot of men investors who can just put the money. And we still get 80% of the money from those investors, because they have money."*

## 1.6 Processes/Conditions that Support Inclusive Practices

Given that Joni is a period care company, with a mission for inclusive and affordable period care, they are working in a space that is already breaking taboos and looking for ways to be inclusive.

In addition, the team works remotely, communicates online, has open and supportive leadership with a fairly flat hierarchy, fosters psychological safety, currently operates a small team which allows in-depth knowledge of each person.

Furthermore, they offer part time and contract work to suit people with caretaking responsibilities or disability.

## SECTION TWO: "POINTS OF CONNECTION"

### 2.1 Commitment to social purpose and/or social justice, or at least questioning model of conventional workplaces

Joni has the strongest commitment to social purpose of all the case studies operating with a business-based structure. Joni was founded on the commitment to social purpose – to provide accessible period care. Their stated mission is: "Making sustainable period care accessible for everyone"

Joni pursues this mission through a business model of selling product in a financially sustainable way, so it's an enterprise. Their mission and commitment to those values attracts and retains customers as well as employees/team members.

The diverse economies approach means they are explicitly pursuing social outcomes as well as a financial outcome of keeping the company running. When explicitly questioned about what sort of trade-off would be made if there was a conflict between social purpose and profit, they could not see a way that would happen. For example, participant 3 responded: *"Profit before their social mission? I don't think so, 'cause it's baked into their business plan. So they do, like there's a 5% give back commitment that I know that they adhere to... they're creating like a holistic community of accessibility"*.

In addition to social purpose for their organisation, they are also committed to social purpose through the supply chain – ensuring their products and processes are as sustainable as possible and investigating their sources within the supply chain for aligned social purpose and sustainability values. This draws the values of the organisation through the company and holds the culture in integrity and demonstrates to employees and customers that it is not “greenwashing”.

For example, quote from participant 1: *"Yeah. Um, so understanding that the partners that we have in manufacturing and supplying our products, they, a, a lot of what we're working towards since the beginning of Joni before I even got there, they're working on making sure that that product is meeting the standards that they set themselves upon creating the company. So sustainable, um, you know, biodegradable or recyclable, responsible within the certificates that they're getting through, like the certificate of forestry, like responsibility, um, through the textiles that they're getting for creating the products. So that portion of it where I think to myself, and, you know, one of the manufacturers is working on like a ci-, circular kind of supply chain where they're not creating wastewater, um, with like toxic chemicals in it. They're like reusing that water through the production process. So it's, it's really interesting."*

Quote from participant 2: *"cause there's, there's so many people, and I was one of them too, as, as you're looking for products that are kind of that extra step, which feels like it shouldn't be an extra sh-, step, it should be something that's already been made into the business model."*

Participant 2 refers to the cofounders and their mission, noting that *"they're focused so much on, um, helping create that new kind of economic style of business where it's like, why aren't we focusing on people and planet and profits? Like all of these things can be together, and why do we always have to sacrifice one over the other? Let's try and make this as sustainable and accessible as possible while we can still make money off of it. 'Cause otherwise it doesn't make sense."*

*....Um, and I think that shift is really slow, but it's happening where companies are realizing like the consumer wants to feel good about their purchase. And though it is very murky and a very gray right now, and I don't think it's perfect, um, I think people are working towards trying to create something that is sustainable because we're all seeing it happen now where we're like, this, this isn't working. Like we're not making this work very well. A lot of people are getting, you know, becoming, uh, climate refugees. A lot of people have terrible working conditions. Like this really doesn't work. This isn't sustainable."*

This commitment to the mission and values can attract talent, for example, Participant 4 pointed out that *"what really drew me to Joni was their core values, uh, the products that they were interested in creating, and their give back model of 5% to period care initiatives across Canada and the US. .... So for me to go and spend, you know, my time being of service to someone else's dream, per se, I really wanted to make sure that it was a good fit."*



## 2.2 Flexibility and Agency

Joni offers a very flexible environment and flexible approach to workload management. In addition to providing remote work opportunities and flexible hours, team members can choose their own workload distribution – i.e., they can work when energies are high and do something else when not feeling motivated.

This balances a high degree of autonomy over choosing work and when to work with clear guidelines on what's expected and which outcomes are mission-critical. Joni employees are empowered to ask for help when they need support to achieve outcome.

Quote from participant 1: *"so, uh, and just staying, like, the work, rather than, like, oh, it's a nine to five job, like, do it. And focus on the, like, values and the vision and the getting shit done makes it easier for everyone. It doesn't have to be, like, hard-pressed, like, job, job. Uh, we have 80, 70 or 50 years on this planet, uh, we can live and learn and work and, like, grow and, like, die, I guess, kind of offensive."*

Quote from participant 2: *"Super flexible. Um, and I think, yeah, I think from, from the get-go, [cofounder], when I was getting hired on, she was like, 'I don't care what your hours are, as long as you're getting them done.' Like, like if you're working, you know, the morning, take a break in the afternoon, come back in the evening. If that's what works best for you, then do it. I'm not looking to like micromanage that portion of it. I'm just looking for somebody to get their work done and respond to me when I need something, you know, kind of urgently."*

*I think the inclusive employment, um, is so important now that we know how we can do this remotely. Like that helps so much. I think you're, you're creating the ability for people to feel included in, in, in the working world, in the workplace. Um, so yeah, I think remote also being flexible with hours. I think that's a huge one.*

*Cause you feel like you have, you know, we still are people, we have lives, we have responsibilities outside of our job. So, um, again, I think that's a really interesting perspective. Um, also, uh, if people do need to go somewhere to work, it's like having those infrastructures in place where it's easy to access public transit if you can't afford a car. 'Cause hell, we all know how expensive it is to have a car. And (laughs) so yeah, I think those kind of things do require some structural changes within, um, you know, cities and, and then also changes maybe the government."*

Quote from participant 3: (identifies as living with disability) *"I haven't had to ask for accommodations because of the nature of the work. Uh, because it's part-time, um, I dedicate four hours of my day to Joni. Um, and I work from home, so I can incorporate walks or whatever other activities I need to do, or change up my activities. Um, I have a variety of tasks to do, so I can always mix up what I'm working on, uh, to keep myself interested (laughs) in what I'm working in. So that it comes with the nature of the job, and I think I've sort of sought that, uh, over time. Like because I only discovered that I had ADHD later in life, I have sort of different tactics that I have developed over time, uh, to get me through the day."*

Quote from participant 5: *"Um, I think there's a couple things here. Like I think that, um, on one sense, we have an inherently, I feel, inclusive environment because of how we work. So we work remotely from home. There's a ton of flexibility there. That support, you know, as a, as a mother, as a parent, you know, that's definitely more flexible and more inclusive in that sense. Um, so I think inherently, there's just like, the way of working is inclusive. Um, and so someone coming in with a disability would find it, would find that they would get the support that they need to take the time, so there's no like, 'You have to be online between nine*

*and five at all times. We're not clocking hours here. Every role has like, you know, accountabilities that, um, things that they're accountable for, um, or they have to report on, but the how you execute, um, is really person-dependent."*

When Participant 5 realised that she could choose her own hours at a previous job, she decided: *"I'm gonna do some hours. I, I'm gonna make my work day work for me, and not try to fit my life into this work day."*

## **2.3 Communication (not always verbal) and psychological safety**

The team members at Joni were aware of the importance of communicating what it is to be inclusive while also refraining from judgement. This means not just sharing platitudes to talk up the culture and the organisation, not only the positive support of all team members, but also the absence of judgement.

Participant 4: *"you know, in terms of like deadlines, we're very, very conscientious of like putting, um, like timelines and being clear about expectations and boundaries and asking for help, making sure that the environment is open, that if you need help or you feel like you're drowning or something is, is going awry, that you can reach out and any one of us will hop on the Slack channel and make a point to support."*

*....We also had an inventory meeting at the same time, and I had something that came up for me personally this morning. And so, I reached out to the team. I told them in full transparency what had happened. And this is something in my personal life. And I said, "You know, I have this interview and then it's gonna go right into the inventory meeting. I'm gonna have to postpone, like not attend the inventory meeting. You can catch me up on Slack or I'll be available tomorrow." And, you know, the hearts come through and (laughs) take care of you and do what you need to do. And so that is who we are. I'm getting emotional just thinking about it 'cause in the morning I had, but the, the genuine care of the person over, "We're not talking about forecasting today. You don't need to talk about it. You don't need to think about it. We've got you."*

In addition, it can be communication via actions – for example, one of the cofounders demonstrated that it's safe to talk about not being on top form. This goes beyond championing inclusivity (discussed in the next section), but models being vulnerable and open, and fosters psychological safety by communicating when not operating at full capacity themselves. Participant 3 related a story: *"[Cofounder] said like, "I cannot focus today. Does anyone have any advice for me?" And then everyone kind of chimed in with some of the techniques that they do. So they're sort of openly sharing that. Because we know they, [the cofounders], work really hard, but even they struggle from time to time, and they are open with that. Um, I know that [cofounder] is sort of a strong, um, proponent for, on her social media, for resting. And not just resting on your period, just also just like, yeah, she might work hard or other people might work hard, but you can't live the grind day in and day out, 'cause you're gonna burn out."*

## 2.4 Champions in leadership positions can drive culture and inclusivity through the whole organisation

The leadership team of Joni are strong champions for inclusivity. As mentioned above, they approach business building from a social justice lens, addressing injustice via the business product itself and the profit-sharing model.

While Joni's structure and hierarchy are very flat, the cofounders appear to lead by supporting their team. We heard that if the team member requires anything, they only need ask. Both cofounders play powerfully to their strengths and interests – one cofounder focuses on logistics and technical problem solving, the other focuses on the “people” side of problem solving.

Participant 3 noted: *“it's accessible period care, but it's also, uh, accessibility, um, encompasses inclusivity. So I think they, um, with Joni, I feel like [the cofounders] started off with the, the dream of accessible period care, and as they dove deeper into it, they, uh, and sort of the, the layers of the onion still is getting peeled away. But what does that, what does that entail?”*

Participant 4 mentioned: *“like, if you go to [the cofounders] with a request, they say, “Wh- wh- Yes, what can we do to make that happen?” So they're very much open to any type of support that you would need.”*

A culture of “inclusivity by default” is championed by the cofounders and supported by the employees:

Participant 2 notes: *“...you're already including people no matter what. It, it, that's what I, that's like how I saw it anyways, when I got trained onto it, it was just like, they're unap-, unapologetically, like inclusive to everyone, and it's just, this is who we are. Um, from what I, from what I'm seeing, like again, I didn't have like a, I don't see like a formal training and I, I didn't see that. I just was trained for my actual job and then was told that we have workers with disabilities that you are gonna work with and, and this is how we've, and I think 'cause it is at this time, it's a small business, so it is very much like we all are talking to each other every day.”*

Quote from participant 5: *“So I'm a really big, throughout my whole career, big believer that culture, um, basically eats strategy. So you can have the best strategy that is super competitive, but if you don't have the culture that is going to help support it, then I feel like you're gonna be dead in the water. So I think that comes from having worked in very not-inclusive and diverse cultures, and then learning from that what I would never want to do.*

*So for me, when it came to the personal philosophy and, and value-based system, autonomy in your work is so critically important, and so that is just ingrained at Joni because of that. And [cofounder] works the same way, and I think that's why [cofounders] work so well together because it's never about... I inherently trust you to do the work, unless something tells me otherwise. And if that's the case, then let's have a conversation around what that is.*

*Like anecdotally, throughout my career, I have had more success, and have had more fulfilling roles when I work with people that bring in diverse experiences and ideas. And that could be lived experiences, that could be, you know education, that could be a whole host of things, but I find that we are... Like the fabric of the culture and the baseline of how we work becomes much stronger.*

*But I think the fundamental core, at least what I've seen, is that how committed are you to your culture? And culture is not, "I have a ping-pong table. We have beer nights." Culture is not like, "We get Fridays off." Culture is, "How do my or- How do my employees talk about the organization and their work when I'm not around?" How are we showing up when nobody is looking? When it doesn't, when nobody's monitoring and, and managing what we're doing, how are we then making decisions? That to me is what the culture is."*

## 2.5 Meet people where they are

Meeting people where they are means that every human has different strengths and needs and it's possible to figure out what best supports each employee on a case-by-case basis. For Joni, given their purpose-driven social enterprise is focused on equity and accessibility, it is perhaps not surprising that this purpose from within the core DNA of the company extends to how they provide flexibility and context for their people to work.

In practice, this means they do not necessarily ask specifically for accommodation requirements and disability status because they will work with everyone to figure out what it is they need. For example, when hiring interns from UVic, they knew that some students with disabilities were coming to work, but unless the students self-disclosed they didn't know what the disability was.

One of the problems with not having a codified inclusivity and accommodations strategy is that it relies on the employees to be able to self-advocate. It is possible that training programs such as OneLight in Powell River or the AimHi in Prince George could be the pathway to developing that ability for a lot of folks.

As participant 1 noted: *"But, I just check with them, like, frequently, like, "Hey, do you need something?" Or, like, "Is there anything we can help you with?" But we never force them to, like, disclose what disability they have, or, like, uh, if... yeah. It's, it's up to them. .... And so, uh, we knew a little bit about what they preferred, how they preferred to work and everything. So we accommodated their requirements. But, other intern we've had, never disclosed what disability they had, and we were fine with it."*

Participant 2 related the natural approach to disability accommodations: *"...we're saying, like, 'Come on, come on down, like, we got this, like, we can figure this out. What do you need from us? And this is what we need from you,' kind of thing. So, um, from what I understand, it, it felt more or less organic in that sense."*

Participant 1 expanded: *"And, and...yeah. And so, uh, and maybe that's why some of the employees who have certain disabilities or anything, they don't affect the work in any way, because they are actually asked or, like, supported in making decisions that make them comfortable in many ways."*

Participant 3 shared their experience with Joni's organic approach to meeting people where they are: *"And even before revealing that I had ADHD... One, one particular time, I was really overwhelmed with the amount of tasks that I had. And I, you know, I wasn't sure of how much time I should be allotting to each activity. And she was really helpful in helping me plot out all the tasks and devoting, and what, how I should be devoting my time. And, uh, just that sort of one-on-one. Uh, I know [cofounder] has a coaching background, so that I felt really coached. And, um, I feel like every manager (laughs) should actually coach like that, whether or not their team is neurodivergent or neurotypical."*

Participant 3 further suggested that it would be helpful to have individual employment plans for people in workplaces, just as there are individual education plan for kids in schools. *"Um, but what I, you know, what I have heard, well, you know, working with my son and his school and the accommodations that they have set up. Like, uh, you know, they have the IEPs, the Individualized Education Program. And, I mean, I, how neat would that be if a work place had a workplace, um, a work (laughs), like a working plan, an individual working plan..."*

*"And then just to think of sort of each person holistically. Everybody has strengths, and everybody has things that are, they're challenged at. So creating a strength-based, um, environment, I think is the goal of any organization. And so then your focus is not on what tasks people can't do, or how this employee is failing, but what, how can we, um, leverage the strengths that each person and create an environment that's gonna optimize that. There, those are my two cents (laughs)."*

Quote from participant 4 on supporting a team member with a disability: *"And so, something that I did was I created, um, like a s- a screen grab video. So I basically had the certification up and then I spoke about what the certification was and she found it a lot easier to, to listen to what I was saying rather than to read and digest all of that information. So, um, yeah, my biggest takeaway from that was to, to meet her where she was at, right? And to ask her what would be the best way for her to learn the information that I had to give, whether it was in a slideshow, whether it was video format, and just making sure that she was comfortable."*

Participant 5 explained their approach to meeting people where they are: *"There's like, a flexibility to how I work, and it's not, I am not measured on, "Did you get this done at this time? Otherwise, you're a failure." It's, "You're a human being. Things came up. Let's look at how you can complete the task in a different way." And that, to me, is... It's difficult with interviews 'cause I can't essentially come out, and be like, "Do you have a disability? If yes, what is your disability, and then how would we accommodate?" But that is how we would manage it with individuals, whether that's, you know, feeling overwhelmed... It, I mean, it could be a whole host of things."*

Participant 5 also reflected on how meeting people where they are also means recognising when there's not a fit: *"And so what that signals to me, essentially over time, is a conversation with like, "Is this person ever gonna be success- Successful in this role?" Because we want to set people up for success as well. Is this person enjoying their role, or are they constantly stressed out because they keep dropping these glass balls? And in the end, the conversation was like, this person wasn't the right fit. They, they felt that way as well, and so we move... They, they moved, they moved away."*