

**FINAL REPORT: December 31st, 2008**

**2008 SPECIAL OPPORTUNITIES AND INVESTMENT FUND GRANT**

This Final Report covers the progress made by LEAD Canada in 2008 with regard to the continued re-building of the LEAD professional development program (PDP) in Canada as detailed in the LEAD Canada 2008 SOIF funding proposal dated November 2007. The initiative is summarized in brief as follows:

- This project builds upon the successful re-launch of LEAD training in Canada in 2007. The project will support the organization to offer of the second stage of the national training session in western Canada in the spring of 2008 (followed by participation in the International Session in Mexico), the follow through on a number of developed funding opportunities, and an “entry” training activity into the US market. The project will continue to be led by a team of LEAD Fellows.

**The goal of the project is to:**

- To build on the foundation established in 2007 of an expanded, revenue generating professional development program including short LEAD course offerings and the possibility of a Canada-US Fellows training program for Cohort 13 in 2008 and beyond.

**The specific outcomes are to:**

- Outcome 1: 6 LEAD Associates graduate in 2008 as LEAD Fellows in Cohort 12, via participation in LEAD Canada’s Fellows training program and IS in Indonesia.
- Outcome 2: 15 LEAD Associates recruited for Cohort 13
- Outcome 3: LEAD Canada training team transformed into multi-capacity professional development program with the technical capacity to deliver a continued and expanding training program in 2008 and beyond.
- Outcome 4: Five year strategic plan completed
- Outcome 5: One or more additional corporations agree to co-sponsor LEAD training in Canada in 2008, and procurement of (at least partial) core funding sources for beyond 2008.

In addition, LEAD Canada became an official Training Partner of the Global Reporting Initiative (GRI) and will be offering revenue generating GRI-certified sustainable reporting short courses. To support this effort, LEAD Canada also secured the institutional sponsorship of the Certified General Accountants Association of Canada (membership: 71,000) and the Association of Chartered Certified Accountants (membership: 122,000 chartered accountants plus 325,000 students). This will materially boost the visibility of LEAD Canada and the entire LEAD network.

### **Significant changes**

The initial plan was to finish the LEAD Canada C12 professional development program (PDP) by late spring 2008<sup>1</sup> and to start C13 with the first national session (NS1) to be held in the third week of May in Alberta; the second national session (NS2) for C13 was planned for mid-August 2008 in Toronto, with the two NTS to be followed by the international training session (ITS) to be held in Mexico City in late November 2008. Initially 13 Associates were recruited for C13 but due to a series of personal difficulties and professional circumstances, only 7 C13 Associates were able to attend the NS1, so it was decided to combine the NS2 for C12 and the NS1 for C13. This then required some re-thinking of the PDP schedule as it meant that there would be a “half cohort” in the training cycle unless adjustments were made. This was accomplished by recruiting for C14 in June 2008, and combining the NS2 for C13 with the NS1 for C14. The early recruitment of C14 also meant that the training period could be stretched out over a 15-month period, responding to another issue in that Associates were finding it difficult both time-wise and monetarily to participate in three one-week sessions within one fiscal year. Recruitment for C14 was therefore more successful with 20 applicants and 13 Associates accepted to participate in the NS1 in August 2008 in Toronto. This will also allow a longer recruitment period for C15 in the spring of 2009 (and for subsequent cohorts), and a 5-year training schedule was also developed.

The second significant change was the decision to apply for certification with the Global Reporting Initiative (GRI) as an opportunity to expand the training horizon and revenue generation of LEAD Canada. GRI provides a Sustainability Reporting Framework for organizations to use as the basis for disclosure about their sustainability performance, and also provides stakeholders a universally-applicable, comparable framework in which to understand disclosed information with the aim that reporting on economic, environmental, and social performance by all organizations is as routine and comparable as financial reporting. GRI certifies organizations to carry out their prescribed training on a country basis so that companies, institutions and NGOs can apply the reporting framework to their activities and operations. LEAD Canada re-directed a considerable amount of its development effort, and the portion of the SOIF resources originally intended for developing the US market, to the GRI certification process which was completed in record time and issued on December 2<sup>nd</sup>, 2008 for a period of 23 months until October 2010. The first GRI training session was offered in Toronto on December 15-16<sup>th</sup>, 2008.

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<sup>1</sup> The second national session for C12 was only held after the International Session due to the late start in 2007.

## Summary of Activities

- January 2008 – Submission of an Expression of Interest to GRI.
- February 2008 – Publication of winter newsletter.
- March 2008 – Strategic planning session held in conjunction with the annual meeting in Toronto; an initial outline of a business plan was developed.
- March 2008 – One day of additional training (systems thinking) was completed with C12 Associates (left incomplete in November 2007 due to early departures to IS in Indonesia)
- March 2008 - Recruitment of C13 Associates; continuation of a training team approach (utilizing Fellows) to fit available financial resources.
- May 2008 – NS2 for C12 and NS1 for C13 held in Camrose, AB at the Augustana Campus of the University of Alberta.
- May 2008 – LEAD Canada pre-selected as a GRI training partner.
- May 2008 – Special General Meeting of LEAD Canada held in Calgary to amend the by-laws (relocation of head office).
- May 2008 – Publication of spring newsletter.
- June 2008 - Recruitment of C14 Associates; continuation of a training team approach (utilizing Fellows), augmented by guest speakers, to fit available financial resources.
- July 2008 – Meeting held with City of Toronto and CleanAir Partnership to discuss provision of LEAD Canada leadership short courses to Ontario municipalities as part of the Natural Resources Canada/Ontario Ministry of the Environment “ONADAPT” program for climate change adaptation (followed by subsequent email and telephone meetings.) Renewed contact with McConnell Foundation; 2008 budget already expended, suggestion to re-submit in 2009.
- July 2008 – Publication of summer newsletter.
- August 2008 – NS2 for C13 and NS1 for C14 held in Toronto, ON at the North Campus of Humber College.
- August 2008 – Compilation of the Associate evaluations of the three national sessions held since the re-launch of the PDP in November 2007.
- September 2008 – Submission to the Canada Revenue Agency of an application for charitable status.
- October 2008 – Meetings held in Vancouver and Calgary to discuss sponsorship opportunities.
- October 2008 – LEAD Canada Vice-president Mehrdad Nazari attends the Canadian Business for Social Responsibility annual conference in Toronto to promote the GRI training sessions.
- November 2008 – 6 Associates from C12 and C13 participate in the IS in Mexico City; 4 become Fellows. Hugh Maynard, manager of PDP, participates in the LEAD International ToT during the preceding week.
- November 2008 – Publication of fall newsletter.
- December 2008 – LEAD Canada receives GRI certification and becomes the first North American organization certified by the Global Reporting Initiative (GRI) to provide an accredited 2-day short course on GRI’s sustainable reporting framework in Canada. The first LEAD Canada GRI training session was offered in Toronto, hosted by George Boire, C7, at Marsh LLP on December 15-16<sup>th</sup>, 2008. Three Fellows (Nazari, Maynard, Paquin) become GRI-certified trainers; two Fellows received GRI reporting certificates (Worts, Boire). Discussions for endorsement by SHARE Canada are pursued as well as a potential sponsorship with Deloitte.

## **Conclusion**

LEAD Canada has been able, with the assistance of the 2008 SOIF contribution, to build upon the re-launch of the Canadian program with the offer and completion of the C12 and C13 training programs, and the start of C14. Despite starting later in 2007 than anticipated, a year of dedicated activity has enabled the organization's professional development program to 'catch up' and move out to the front of the delivery line. The organization has been able to establish a Secretariat to support its development activities, in particular for the initial foray into short-course offerings through the GRI certification. The new program has also continued to engage the interest of Canadian LEAD Fellows who have made significant contributions to the preparations and delivery of the professional development program, and promotional efforts have gradually increased with the publication of four newsletters in the year. Even with the renewal of the HSBC sponsorship, the challenge still remains financing, more specifically the ability to secure additional commitments within a timeline that will allow LEAD Canada to support the variety of program and logistical activity required in a consistent manner from year-to-year; the application for charitable status will assist in the long-term strategy to address this situation.

In summary, LEAD Canada has been not only been successful in re-launching the training program, which it now calls a "professional development program", but also to make the first of many short-course offerings to not only fulfill its mandate of helping individuals to deepen their knowledge about, strengthen their skills for and engage in action in sustainable development, but also to become more financially self-sufficient in doing so.

**LEAD Fellows in/from Canada or the US engaging with LEAD Canada for the development/delivery of the C13-14 and GRI training programs.**

- Alan Abelsohn (C6)
- Peter Baltais (C6)
- Mark Bekkering (C3)
- George Boire (C7)
- Bruce Gilbert (C7)
- Robert Hellier (C11)
- Doug Kube (C5)
- John Lewis (C13)
- Varghese Manaloor (C11)
- Hugh Maynard (C6)
- Mehrdad Nazari (C7)
- Alexandre Noukhovitch (C1)
- Marc Paquin (C8)
- Doug Pinto (C12)
- Waheed Sadiq (C10)
- Gary Sandberg (C4)
- Carole Therrien (C7)
- Joanne Thompson (C7)
- Doug Worts (C6)

In particular, a number of Fellows were instrumental in leading the organization, managing operations and helping to secure facilities and site visit arrangements for the different activities throughout the year:

- *Carole Therrien*, LEAD Canada President, carried out the responsibilities of National Program Director and participated in LEAD International Board and Management meetings in June (UK) and November (Mexico).
- *LEAD Canada* board of directors is composed entirely of LEAD Fellows (Therrien, Nazari, Maynard, Worts, Langshur, Trevor-Deutsch, Murry, Antoniu, Lusby).
- *Hugh Maynard and Douglas Worts* prepared and were the principal deliverers of the national session modules, as well as coordinating the logistics and site visits.
- *Mehrdad Nazari* prepared and is the principal deliverer for the GRI-certified training materials.
- *Varghese Manaloor* helped to arrange the use of the facilities at the Augustana Campus of the University of Alberta (where he teaches), supervised some graduate students in the preparation of a case study for one of the site visits as well as assisting with arrangements with one of the site visits itself.
- *Peter Baltais* arranged for a site visit to the Imperial Oil plant at Cold Lake, Alberta, an *in situ* oil sands facility.
- *Robert Hillier* helped to arrange the use of the facilities at the North Campus of Humber College in Toronto, Ontario (where he teaches), as well as a tour of sustainable building sites on the campus.
- *John Lewis* delivered an urban planning simulation session at the Toronto session in August.
- *George Boire* provided facilities and food at the offices of Marsh LLP in Toronto to host the first GRI training session.

Fellow get-togethers were also held in Ottawa (May), Toronto (July), Calgary (August) and Vancouver (October) during 2008.

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