



FOCUSED ON THE BUSINESS OF LEADERSHIP

PROPOSAL FOR RESEARCH ON CALGARY'S LEADING WOMEN

Request for Sponsorship

*Does Calgary's Business Environment Impact The
Advancement Of Women?*

January 9, 2006

PURPOSE

The purpose of this research is to examine how the Calgary business community compares with the results presented in the 2004 national Catalyst report: “2004 Catalyst Census of Women Corporate Officers and Top Earners of Canada”.

From a more practical organizational and corporate perspective, the purpose of the inquiry is to identify the learning needs of women that will provide organizations with insight into:

- The requirements for attracting and retaining Calgary’s top leadership talent;
- The key components for developing leadership programs that are inclusive and responsive to women’s learning needs and leadership issues;
- The creation of strategic succession planning programs for women who have potential to contribute to the organization at a senior level.

From an individual perspective, data on trends specific to the Calgary business environment can bring more opportunity for Calgary’s female leadership talent to plan career advancement strategies.

Catalyst has been conducting census data gathering since 1999 nation-wide in an effort to track trends in the representation of women moving into executive roles in both Canada and the U.S. The data provides concrete information about trends related to compensation and based on industry, position title and function and type of company across Canada. Organizations can utilize this benchmark information in corporate program development such as succession planning and leadership programs. The data provides a Canadian perspective on the status of women in corporate business environments.

Of particular interest to organizations are the inferences that can be drawn regarding attraction and retention policies and programs for women in the workforce. While the general Canadian perspective is valid, it only provides a starting point, as communities across Canada such as Calgary may have unique business cultures that contribute to some of the trends identified by Catalyst that exist in Alberta. A further look at specific trends in Calgary would be beneficial.

There are two factors which could impact the data provided by Catalyst and which provide further points of inquiry:

- Today, the oil and gas business community dominates Calgary. Historically, Calgary has been primarily an agricultural & farming focus. Both of these have their roots in traditional, hierarchical organizational structures predominantly based on male models of leadership and management that today’s organizations are built from.

- Catalyst provided a nation wide census based on survey information and public data. A change in methodology with a smaller scope would provide an opportunity to use individual interviews to probe for further information pertinent and specific to the Calgary community. For example, Catalyst identified a number of positions considered to be part of the “Executive Pipeline”. A key role in the oil & gas sector is that of engineer, which was not named as part of the executive pipeline. This is an example of where the Calgary corporate environment has a unique culture and where further examination may prove beneficial.

Previous Research by Leibham & Co

In 1998, Donna Leibham examined the learning needs of women in managerial roles as part of a graduate degree project. One of the components of the graduate project was a Leadership Development program designed to capture the leadership and learning needs of women. The outcome was a model for core competencies that has been refined over several years of engagement with women in a Leadership Workshop and Executive Coaching Program. This model has been successfully applied in the Executive Development – “Leading From Within” leadership development programs and further inquiry is being sought to expand on the leadership core competencies for women.

Catalyst Results – Results from 2004 Catalyst Census

As with the research done by Donna Leibham in 1998, women continue to comprise 46% of the workforce, which is close to what one would expect, however women comprise only 36% of management positions based on the data that was generated in 2004 by Catalyst. Women are represented in only 14.4% of the corporate officer positions in fact, from 2002 to 2004, the number of companies without any female corporate officer increased from 37.5% to 38.6%. Over a two-year period, there has been little, if any significant progress as the summary table outlines.

Key Findings in Canada by Catalyst, 2004 Census

Finding	2004	2002
Corporate Officer Positions in FP500	14.4%	14.0%
At Least 1 Female Corporate Officer	61.4%	62.4%
# Of Companies with Multiple Female Corporate Officers	35.6%	33.6%
# Of Companies with No Female Corporate Officers	38.6%	37.6%
Line Officer Positions Held by Women	9.4%	9.0%
Highest Corporate Officer Title Held by a Woman	7.1%	6.7%
Top Earners are Women	4.5%	3.9%
Positions in Executive Pipeline held by Women	14.8%	12.5%
# Of Companies with 25%+ corporate officers	95	87
# Of Women Leading FP500 Companies	19	13

According to the 2004 Catalyst Census, women earn more than half of the bachelor degrees (60%) & master degrees (52%) in Canada. In addition, women have earned just fewer than 45% of the doctorate degrees in Canada. Clearly, women's advancement into corporate officer positions has mirrored the increase in women's education levels.

Catalyst has determined that significant progress for women can be defined as a target of women occupying at least 25% of the corporate officer positions. Of the companies that Catalyst obtained data from, only 95 companies had the 25% minimum number. And according to Catalyst, given the existing rate of advancement, it will take two more decades for this to occur. There were a number of companies with head offices here either in Calgary, or in Alberta where there is little if any representation of women in senior roles – the list includes 32 companies. It is interesting to note that of these 32 companies, 17 of the companies are oil and gas, or oil and gas services or related.

One positive trend that is noteworthy, particularly for Alberta was the identification of several companies that did have women represented at 25% or more of the corporate officer positions, and there are five oil & gas companies identified.

Another positive trend that Catalyst reported was that the executive pipeline is strong. In other words, the 2004 data shows that there is strong representation of women in positions that can lead to executive roles, resulting in a high potentials pool for clout positions. Examples of positions in the executive pipeline include identified by Catalyst include:

- Business Unit Head
- Chief Information Officer
- Corporate Secretary/General Counsel
- Chief Financial Officer
- VP of Finance
- Treasurer

FOCUS OF QUERY

The study will have a dual focus. The first is an extension and further exploration of the Catalyst data presented in the most recent census report to determine if there are trends unique to Calgary. The second focus is the continued identification and clarification of core competencies for Calgary's Leading Women, and related is the continued development of the model of leadership for women presented by Leibham & Company in 1998.

Catalyst Census Data

1. The first question is how does the Calgary community compare with the national survey conducted by Catalyst?
2. What impact does the oil and gas industry have on the advancement of women in Calgary? Specifically, do the finance skills that Catalyst identifies as important for the executive pipeline hold true for the Calgary community where engineering is a critical skill set for advancement in the energy sector?
3. What are the executive pipeline positions in Calgary, given that it is primarily an oil and gas town and engineering is a strong skill set for the oil & gas business?

Leibham & Company Core Competency Model for Leading Women

1. Identification and clarification of core competencies of Leibham leadership model
2. What are the succession planning practices in corporate Calgary?
3. What barriers to advancement do women experience in Calgary?
4. What are the lessons that contribute positively to advancement for women in Calgary?
5. What are the factors that contribute to women staying in positions inside organizations in Calgary?

DELIVERABLE

A detailed report will be provided outlining current data of women's experience here in Calgary with recommendations for organizations to use in planning such as succession planning, leadership development programs, attraction and retention strategies, and compensation planning.

LEADING WOMEN SAMPLE DEFINED

Similar to Catalyst, the research will focus on women who have successfully achieved a clout position, or senior executive role within the organization, including: CEO, VP, EVP, CIO, CFO, Director. In Calgary, it is possible that the most senior female has a Manager or Director title, and so in some organizations this may be the appropriate level. In general however, the interview will be requested of the most senior role that women occupy in the organization. In 2004, Leibham & Company partnered to offer a Mentoring Lunch where women in executive roles shared their leadership experiences in a small group format. The criteria used at that time to define a Leading Woman was geared to the Calgary business community and some of these categories may be suitable for this project. Criteria included:

1. Corporate – women who are in positions at the VP level or above (VP, Executive VP, COO, CIO, CFO, CEO, President, etc.)
2. Entrepreneurial – women who have been successful in the start up of a business enterprise in Calgary that has grown consistently in revenue and employee base over a period of 5 years
3. Non-Profit – women who are in the position of Executive Director, Board Chair or Board President of a long standing non-profit organization
4. Municipal, Provincial, or Federal Government – senior positions such as Alderman, Mayor at the Municipal level and Deputy Director at the Provincial/Federal Level
5. Community – long term involvement in Calgary's community at a senior level in fund development

The sample size is targeted at 20 as a minimum, and 30 as a maximum, although as many interviews that can be accommodated within the research time frame will be included. Some of the work conducted by Leibham and Company in the past has resulted in an extensive network of Calgary's Leading Women. This network will be accessed for a request to engage in the data gathering.

METHODOLOGY

A combined data gathering strategy will be utilized: questionnaire and interview. Background information will be gathered from a short questionnaire and may include a larger sample size. The advantage of the questionnaire as a data-gathering tool is that it is very efficient – a large number of participants can be accessed in a relatively short period of time and the data can be quickly summarized. Individual interviews will be conducted with a minimum of 20 participants at the executive level. This strategy allows for deeper exploration of issues as each response can be probed for greater detail.

Data from questionnaires and interviews will be summarized and analyzed for trends. Individual participants will be given a code number. Results will be provided in aggregate format, with individual responses kept anonymous. The report will reference overall trends.

SPONSORSHIP REQUESTED

There are three levels of sponsorship that will be acknowledged:

Clout Level - \$10,000.00

Leadership Level – \$5000.00

Executive Pipeline – \$2500.00

Benefits of Sponsorship:

Participating sponsors can expect:

- To have their corporate or company logo to appear on the Leibham & Company website as a Research Sponsor for the one year from the commencement of the research project
- To be acknowledged in any media or press releases as well as in the report generated with the inclusion of the corporate logo
- To receive a detailed report once the data has been compiled and analyzed, including recommendations for strategies that organizations can implement for attraction and retention strategies, leadership development and succession planning programs, etc.
- To be invited to attend a presentation of data with all sponsors, and upon request, to have corporate presentations made to corporate representatives
- Reinforcement of the corporate image as a workplace of choice for Calgary's talented women

- **In addition to the presentation and detailed report:**
 - **Clout Level** sponsors can refer one employee who can participate in 3 individual, executive coaching sessions
 - **Leadership Level** sponsors can refer one employee who can participate in one individual, executive coaching session

PROJECT MILESTONES

Develop Proposal Target: January 15, 2006
Secure Funding For Research Target: February 2006
Conduct Interviews Target: February - April 2006
Analyze Data Generate Report Target: May - June 2006
Presentation of Findings & Report Target: June 2006