



CESO | SACO

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1. ABOUT CESO



What We Do

We help individuals and organizations strengthen economic and social well-being through the engagement of highly-skilled, senior, executive-level Canadian volunteers, known as “Volunteer Advisors”.

Our Focus: Economic development and Institutional Strengthening



47 Years Strengthening Economies

- CESO began working with Aboriginal communities through INAC in 1969
- Over 30,000 assignments in Canada and 46,000 assignments in over 100 countries
- Partnerships with private sector funders for community development, such as RBC Foundation
- 700 Volunteer Advisors on roster
- First Assignment: Kainai Blood Tribe in Alberta

What Makes CESO Unique

Experienced Volunteers and Strategic Recruitment Strategy

- Our VAs have included captains of industry and leaders in the public sector
- Professionals passionate about “giving back” in an advisory and mentorship capacity. Recruited for expertise and ‘fit’

Strategic, high impact partnerships and assignments

- Short term and multi year
- Commitment far beyond the field
- Focus on capacity building and institutional strengthening

Experience working with diverse cultures and populations

- First Nations, Metis, Inuit communities, and indigenous peoples (Guyana, Bolivia, Peru, Philippines, Guatemala, Panama, and Honduras)

Clients and Sectors

In Canada: First Nations, Inuit, and Métis Tribal councils, hamlet councils, Chief and council, EDOs, finance managers and officers, finance and audit committees, local entrepreneurs, small and medium size businesses, governance boards, investment corporations , government, women's associations/community organizations, industry

Across a broad range of sectors and industries and in response to client demand, CESO services are organized under seven key areas based on assignment activity:

- Strategic Planning
- Business Development
- Accounting and Finance
- Organizational Development
- Community Development
- Governance
- Production and Operations

CESO Clients and Requests – the West

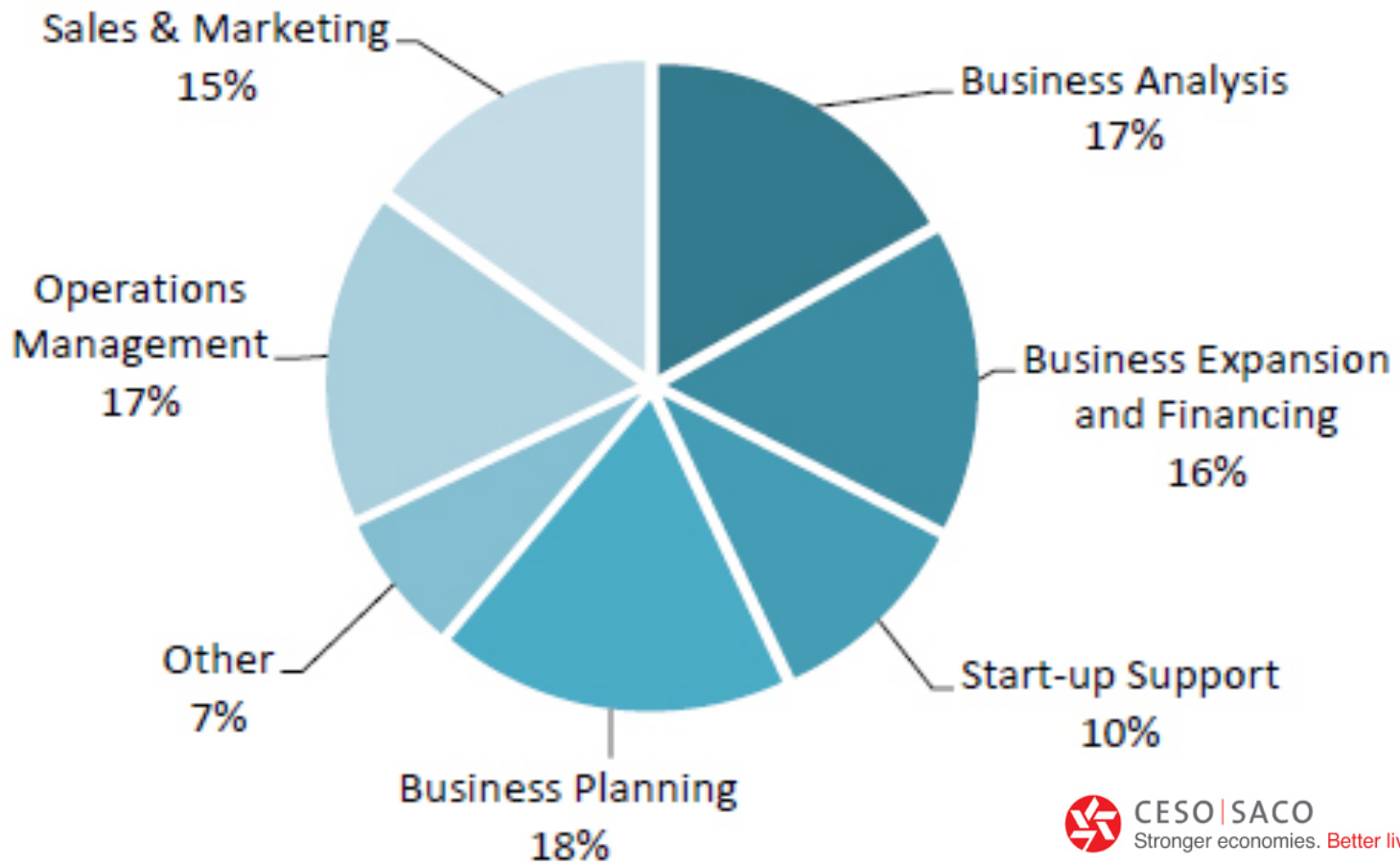
A Range of Indigenous Groups and Individuals

- **Over 220 Clients since 2009**
 - Approx. 20% SMEs; 60% Band Councils; 15% NGOs; 5% Other
- **Over 100 Assignments since 2009**
 - Community Economic Development (over 50%)
 - Entrepreneurial Support (25%)
 - SME Development (10%)
 - Policy and Organizational Development (10%)
 - Other (5%)
- **Examples of Assignment Purposes (in Entrepreneurial and SME Support):**
 - Audit preparation & policies review
 - Business planning, feasibility studies, expansion of home business
 - Developing marketing plans, operational reviews,
 - Mentoring managers and financial staff
 - Workshops on youth entrepreneurship & job readiness

CESO Volunteer Advisors

Skills Classification

Business Management



Volunteer Advisors (VAs)

Senior Executives and Industry Leaders

- **130 VAs in BC and AB** (nearly 600 presently active nationally)
- **Occupational Groups and Skills** (in order of volume):
 - Business Management and Development (including Strategic Planning and Project/Program Management),
 - Community Development,
 - Natural Resources and Resource Management (including Agriculture Production and Forest Management)
 - Organizational Development
 - Tourism and Hospitality,
 - Governance,
 - Engineering,
 - Manufacturing,
 - Creative Arts and Media,
 - Food Processing

A Versatile Approach



Why CESO Can Successfully Support Communities

Demand-driven assistance and results-focused

- Client-driven priorities
- Strategic recruitment
- Coaching/mentoring approach to build capacity

Value for Money

- Volunteers bring intensity and efficiency
- Distance/long-term mentorship (versus consulting)

No Vested Interest

- CESO does not have a political or religious affiliation
- Non profit-making agenda



3. EXAMPLES



Naskapi First Nation of Kawawachikamach

Overview

- 1,100 members
- approx. 16 km NE of Schefferville, QC close to Labrador border

First Steps

- Client meets 2 LVAs
- Relationship building
- Discussed and agreed upon process and timeframe

Assignment

- Assist the Municipal Community Local Health Centre and the Community-wide Health Committee (multi-sector, multi-discipline) in defining a vision for health in the community and in strengthening the management capacity of employees/members with a view to addressing the needs and health priorities specific to Kawawachikamach

Engagement

- Quarterly community visits, 1:1 interviews, workshops on proposal writing, planning, written communications, holistic health



Naskapi First Nation of Kawawachikamach (cont'd)

Results

- Group Learning Plan and Individual Learning Plans:

DOMAINS	OBJECTIVES (to increase the group's knowledge and understanding with respect to ...)	ACTIVITIES	TIMEFRAME	SUPPORT REQUIRED	OUTCOMES (Participants have ...)
1. Leadership & Governance	<ul style="list-style-type: none"> leadership & governance in general 	<ul style="list-style-type: none"> ongoing brownbag lunch discussions 	<ul style="list-style-type: none"> quarterly 	<ul style="list-style-type: none"> CESO VAs supervisors DG, CLSC 	<ul style="list-style-type: none"> increased competence as First Nation health managers with an emphasis on: <ol style="list-style-type: none"> systems management and leadership; team management and leadership; personal skills development increased motivation and confidence in undertaking the range of functions of First Nation health manager attitudes to work that have evolved to be in line with needs of the community
2. Professionalism	<ul style="list-style-type: none"> developing a code of ethics 	<ul style="list-style-type: none"> workshop group discussions 	<ul style="list-style-type: none"> Jan. 2013 (1/2 day) 	<ul style="list-style-type: none"> CESO VAs 	
3. Advocacy, Partnerships & Relationships	<ul style="list-style-type: none"> inter-jurisdictional issues (federal, provincial, municipal, inter- and intra-organizational) policy development 	<ul style="list-style-type: none"> workshop workshop 	<ul style="list-style-type: none"> June 2012 (1/2 day) March 2013 (full day) 	<ul style="list-style-type: none"> CESO VAs CESO VA 	
4. Human Resource Management	<ul style="list-style-type: none"> HR management in general 	<ul style="list-style-type: none"> workshop external training where warranted 	<ul style="list-style-type: none"> t.b.d. 	<ul style="list-style-type: none"> CESO VAs external trainers (if required) 	

Tourism Business Mentorship Program with the Department of Industry, Tourism and Investment, GNWT

Overview of the Tourism Business Mentorship Program

- CESO VAs to build capacity and work with resident tourism operators to learn business skills
- Client-chosen VAs skilled in tourism and business development will mentor new and prospective tourism operators

Guiding Parameters

- Training needs highlighted by the *NWT Economic Opportunities Strategy*
- The Legislative Assembly's goal of a diversified economy that provides opportunities to all communities and regions

Assignment

- CESO VAs, who meet program requirements of the mentorship process mentor young and relatively inexperienced tourism entrepreneurs



CESO Assignment Example- First Nations Loans Company

Overview

- Client was recommended by auditors to develop a collection policy as many loans were not being repaid

First Steps

- Client chooses from 3 VAs, based on expertise, experience, and fit
- Relationship building
- Discussed and agreed upon process and timeframe

Assignment

- Analyze current lending and loan recovery practices and suggest ways to improve the loan collection policies and procedures.

Engagement

- Meeting with Clients: to review background, clarifying strategic aims, understanding lending policies, uncovering facts and figures from lending statistics, and outlining and discussing possible loan recovery options

First Nations Loans Company (cont'd)

Results

- Description of current situation regarding lending/collection policies, and their impact on financial standing of organization.
- Delivering Final Report outlining recommendations for amending and/or introducing lending/collection policies and procedures, designed to strengthen organizations current/future financial standing.

Next Steps

- Skills development for board members and staff in bankruptcy, consumer proposals, and settlements accounts.
- Implementation of suggested solutions to lending/collection policies.

First Nations Loans Company (cont'd)

Volunteer Advisor Profile

- Thirty years experience in the Financial sector as a director, manager, and country representative.
- Roles:
 - Micro, Small and Medium Enterprises Development Advisor of Multi-National Organization
 - President and CEO of International Financial Institution
 - Business Development Services for SMEs in the energy, infrastructure, manufacturing, processing, hotels/tourism and other sectors
 - International Bank Representative of leading Canadian financial institution
 - Credit Officer of leading Canadian financial institution
- Education:
 - Masters of Arts in Economics
 - Bachelor of Arts in Economics
 - Decision Making in Climate Change Certificate

Peter Ballantyne Cree Nation – 7 Communities

Overview

- 7 communities in interior Saskatchewan

First Steps

- Client held phone interviews with 2 VAs'; reviewing 4 ahead of this short-list
- Client and VA design Partnership Action Plan together and discuss timelines



Assignment

- The First Nation's economic development officer will receive advisory support in establishing a mission, vision and goals/objectives statement and establish an economic development board/committee in one community as an exemplar for others. A band-wide economic development plan will follow.

Engagement

- Forthcoming: the VA will conduct a needs analysis of the first community to engage; help to develop policies, TORs and parameters by which the governance body will follow.

Peter Ballantyne Cree Nation – 7 Communities (cont'd)

Volunteer Advisor Profile

- Over thirty years experience in business, strategic planning, and government relations as a consultant, coordinator, evaluator, and business advisor.
- Roles:
 - Small Business and Community Development Consultant
 - Aboriginal Consultant for an urban housing organization in Saskatchewan
 - Government Liaison in the health care profession
 - Project Administrator with a city in Manitoba
 - Shelter Director with a Crisis Centre
 - Several community provincial and national contributions with the non-profit sector as a Chair and Director
 - Membership: Métis Nation - Saskatchewan
- Education:
 - Business Education (Keewatin Community College, Manitoba)
 - Arts & Science (University of Manitoba/University of Saskatchewan)
 - Courses completed in Aboriginal Management, Values and Ethics, Proposal Writing, Introduction to Cree Language, Entrepreneurial Training

Partnership Model

Council of Yukon First Nations (CYFN):

- CESO is currently working with 11 Yukon First Nations communities to develop comprehensive community health plans or other services as requested by individual First Nations
- Aim to provide support to implement the plans and is mentoring CYFN staff throughout
- Funding supplied to CYFN by Health Canada – Yukon Region
- CESO LVA model applied to oversee the entire project and assist with VA identification for specific roles and to engage and work with each community in identifying their current needs
- This same model is going to be used to approach the Yukon communities for economic development

Mentorship

Government of Nunavut:

- Partnership with GN began in 2001, with goal to:
 - Support development of highly skilled public service;
 - Support increase in Inuit participation in government employment; and
 - Assist people of Nunavut to improve their social and economic environment.
- Assignments based on goals and skill-development needs of GN and employees
- VAs strengthen skills through on-site and distance mentoring, workshops and management tools
- 80 percent of these assignments involve beneficiaries of the Nunavut Land Claim Agreement
- **Results:**
 - Achieved clear understanding of their role in GN Department, as team member and individual, and ability to define goals and develop work plans
 - Community feedback indicates they now receive more effective assistance with respect to targeted community-based initiatives

Economic Development Examples

Windigo Council (Sioux Lookout, ON)

- Created a two-day workshop on developing an Economic Development Strategy and delivered it to their member First Nations Chiefs and EDOs

Moose Cree First Nation (Moose Factory, ON)

- Assistance to increase capacity in running a tourist lodge from an Operations, Business and Marketing standpoint

Union of Ontario Indians (North Bay, ON)

- Establishing an investment fund for member First Nations



Liard Hot Springs Lodge (Fort Nelson First Nation, ON)

- Created a two-day workshop on developing an Economic Development Strategy and delivered it to their member First Nations Chiefs and EDOs

What Clients Say About Their Experiences:

More compliance:

- More knowledgeable about industry standards and regulations
- Able to secure more funding, confidence and partnerships from investors and banks

Better productivity:

- Improved ability of individual employees to carry out their responsibilities successfully
- Learning and growth of people acting temporarily in management positions, through one-on-one mentor support

Stronger governance and leadership:

- Clearer sense of roles and responsibilities
- Increased effectiveness and performance of oversight and management teams

Navigating change:

- Smoother transitions in times of organizational change

4. WORKING TOGETHER



Opportunities for You

Community Economic Development

- Facilitating community economic development, strategic planning and advising on capacity development initiatives and approaches to leverage financial resources

Mentorship:

- Mentorship or coaching of individuals, or teams
- Special projects in which staff are mentored to strengthen their skills and which also result in short term deliverables: i.e. proposal development, a strategic plan, leadership development

Financial management:

- Strengthening the accounting and finance skills of community leadership

Procurement:

- Enhancing the capacity of Aboriginal businesses in the areas of costing, documentation, bidding process, and more

Opportunities for You (cont'd)

Entrepreneurship:

- Targeting Aboriginal youth to enhance their business development skills and employability

Business Development Support

- Support to Aboriginal entrepreneurs for a range of activities including business planning, start-up, expansion, accounting systems and/or marketing.

Governance:

- Institutional strengthening

Industry

- Assistance/Advisory role to effectively engage with communities.

Thank You

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