

Carey Stevens Ph.D., C. Psych ● ● Consulting Psychological and Business Advisory Services



Carey has over 40 years of experience in behavioral psychotherapy, family and business mediation and forensic assessments and over 20 years in large consulting organizations. He has blended his insights and knowledge of how people and organizations develop and business consulting experience to provide expertise in developing the strategic as well as the tactical implementation of processes around multi-national, large scale and complex people management initiatives. He has worked in several public, private and crown corporation environments throughout North America, Europe and Asia.

As a business leader, Carey co-founded PSS, an organizational consulting company that was acquired by Deloitte Consulting in 1996 for the purpose of creating and developing its Change Management Practice. He also founded Pulvermacher, Stevens and Shack, Clinical and Consulting Psychologists, which were acquired by a public company that aggregated non-medical clinical services. As a Deloitte Consultant, he spent his last 5 years as their Canadian Change Management Practice Leader. Subsequent to that he held the position of Canadian National Change Management Director at the Hay Group and then held the position of General Manager of Corporate Leadership and Executive Development at Canada Post Corporation where he was responsible for leadership development, enterprise-wide assessment strategies, career management and development strategies and talent management for the "Top 400". Presently, Carey owns and operates *Business Psychologists*, an independent consulting company that specializes in the management of talent, leadership development and executive coaching. Additionally, he has completed several integrated planning exercises within the Federal Government. He has created and delivered the first evidence based talent segmentation initiative in the federal government that was nominated for the Director General's Award for Innovation. As well, he has worked with the RCMP on HR Renewal and the RCMP's response to the Brown Commission and has been an executive coach at the

Executive Counseling Center for the Public Service Commission. Carey has completed several initiatives within citizenship and Immigration, Operations Management Branch completing logic model based diagnostics to increase organization alignment and leadership cohesion, to segment and prioritize customers, align roles and responsibilities and set accountabilities and to ensure that there were people in the right places with the right skills that could do the work. Most recently, Carey has worked within the Public Safety environment on several of their highest strategic priority business transformation initiatives.

As you can see there is a balanced mixture between strategy and client relationships, and the more operational and tactical aspects of organizational transformation. Additionally, Carey has a history of working within harsh environments of high conflict and high ambiguity. He has demonstrated the resilience and persistence required to deliver under stress where deadlines are critical. At the same time, Carey prides himself on being a builder of teams and a developer of people. While he has led several teams of varying sizes and geographies, he has also demonstrated that he can be a 'hands-on' practitioner who 'gets involved' with his clients as indicated by his long-standing and continuous relationships.

Lastly, Carey is a Certified Personal Fitness Instructor where he is integrating his psychological experience, his consulting experience and now, his personal fitness experience to round out his approach to personal and organizational health.

GENERAL CONSULTING EXPERIENCE

General Coaching and Leadership Development: Carey has been a practicing psychologist, business transformation consultant and executive coach for over 40 years. Carey has provided coaching and leadership development services for individuals and several Fortune One Hundred corporations in Canada, United States, Europe and Asia Pacific. Carey has not only been asked to develop traditional coaching programs but has also been asked to develop and deliver virtual coaching programs and monitor these programs over longer period of time. Some of these corporations and organizations included: Lucent Technologies, Avaya Communications, Global Crossing,

Newbridge Networks (Alcatel), CATSA, Canadian Mint, National Energy Board, Irving Oil, Deloitte Consulting, Hay Group, Province of Nova Scotia (Departments of Tourism, Finance, Community Services), RCMP (Executive Development, Human Resources, Occupational Health and Safety, Brown Commission), PHAC (CCDIC, HMIRC, CISO, CSIS, USCellular, Alterna Bank, Canada Post Corporation, Service Canada, Ontario Superintendent of Financial Institutions, Executive Counseling Service at the Public Service Commission, Elections Canada, Public Safety and United States Department of Homeland Security.

1. PUBLIC SAFETY – (November 2013 – Present) Dr. Stevens was asked to co-lead the Transformational Change Management work stream in several of the largest and most significant transformations in the services history. These projects required the development of a transformational change strategy consistent with the Service's legacy culture utilizing logic models, and the future culture and the Service's vision. Additionally, Dr. Stevens provided consistent briefings to senior management regarding risk, delivering workshops leading to process improvement scenarios and implementing these new processes across all regions and all functions.

Dr. Stevens developed and managed the strategy for the decommissioning of legacy systems and the adoption of the new technology. At this time, Dr. Stevens is actively involved in deploying several major business transformation initiatives across Public Safety; optimizing operational productivity through the integration of other simultaneous transformational initiatives. Dr. Stevens has also presented his views and frameworks to other international agencies on behalf of the Service.
Reference; References available upon request.

2. NATIONAL ENERGY BOARD (JUNE 2015 – PRESENT) The National Energy Board (Alberta) has not only been going through several simultaneous business transformations but also has had several meaningful leadership changes. These changes have impacted the Finance Team to the extent that signs of performance, morale and over-work issues were starting to emerge. Acting proactively, the COO and CFO

felt that they needed to equip their leadership cadre to handle these employee issues in a consistent and multifaceted way. Additionally, they felt that an investment in their leadership / executive team would have a positive impact on departmental performance as well as on the long term retention of the team. Dr. Stevens was asked to lead and deliver on this project specifically for the combination of his change management experience in the finance area, his leadership development and coaching experience in the finance area and the extended advantages of his psychological designation. At this time, the initiative has been deemed very successful and the executive time is currently expanding the initiative to include a leadership development and coaching program to middle managers. The current project has been extended to include coaching for the entire executive cadre. Dr. Stevens continues to coach and develop leadership to the NEB.

References: Ms. Paula Fotoransky, CFO; Ms. Meghan Ruholl, VP Finance

3. LANDREX – (November 2013 – 2014) Dr. Stevens was asked to assist Landrex, a large land development organization in Alberta in their strategic plan and corporate renewal initiative. Working together with the Owner and the Chief Legal Counsel, Carey created a framework and forum for the development of their new strategic plan, developed a leadership development and "professionalization" program for the employees and coached the VP Finance, VP Sales and the COO in the implementation of the recommendations which emerged from the planning process. Carey has also been acting in an advisory capacity to the Board of Directors.
Reference; Larry Andrews, Owner and CEO, Garry Wetsch, Chief Legal Counsel)

4. HEALTH CANADA (October 2017 – Present)

The Medical Devices Division of Health Canada has been moving through simultaneous business issues over the past several years. As they stabilize, the Acting Director has commissioned a team alignment and leadership development program to assist their leadership team by renewing their leadership competencies and team cohesion. These exercises included a collaborative 360 assessment process, uniquely designed to foster collaboration and cohesion

amongst the leadership team. **Reference:**
Carey Agnew, Acting Director

5. EXECUTIVE COUNSELING SERVICE / PUBLIC SERVICE COMMISSION (JULY 2008 - PRESENT)

Dr. Stevens has been engaged by the Public Service Commission and the Executive Counseling Service as a senior psychologist and business consultant to provide executive coaching, leadership development, psychological and vocational assessments, succession planning and general advice to the senior executive cadre of the Federal Government. He has assisted these and other senior executives becoming more effective leaders, providing individual and team approaches to leadership, as well as assisting senior government executives with interviewing skills, anxiety management, workplace conflicts, change management and general advice and counsel. Additionally, he provided 360 Degree and other psychometric assessments as well as general psychological services to a wide variety of senior Federal Government executives. These individuals ranged from those who were seeking promotions and attending Board Competitions at the EX1, EX2, EX3 and EX4 levels. **Reference; Tracey Abbott, Psychologist**

6. HAZARDOUS MATERIALS INFORMATION REVIEW BOARD (February 2010 – Present)

Given the GoC's requirement for integrated planning as well as HMIRCs need to redevelop its strategic and operational plan, Dr. Stevens was engaged to assist HMIRC in the organizational and human resource component of the new integrated plan. He provided coaching and strategic guidance around the strategic priorities of the organization to the senior executive as well as senior managers. In that regard, Dr. Stevens was asked to advise the executive on issues affecting the Commission's ability to achieve the programs business objectives. Following from that activity, he was engaged to assist in the talent management and career learning and developmental aspect of performance both for individuals as well as establishing a talent management process for the Commission itself. Additionally, he provided the more tactical skill building requirements for each level of the integrated planning process.

He also provided 360 and psychological assessments to the senior management cadre. Through this process, he has provided individual coaching and advisory services to the President of the Commission, the VP of Corporate Service, and the VP of Service Delivery, which he continues to provide at this time. **Reference; Ms. Sharon Watt, President**

7. CITIZENSHIP AND IMMIGRATION CANADA (Operations) (February 2012 - August 2012)

Given the issues of WFA, the retirement of the ADM and the incoming of the new, ADM, there was a need in the operations branch to understand their organization in terms of reviewing the vision and strategic priorities, establishing definitions of success for key stakeholders, prioritization of work activities, and ensuring that the appropriate resource was assigned to the appropriate task. Working with the outgoing ADM and DG, Dr. Stevens was asked to assist all levels of the staff to become more efficient and more effective and the ways they carry our work. In this regard, Dr. Stevens developed a customized framework and methodology for the leaders to come to a better understanding of how they were organized, how they could become more productive, and increase morale within the department. As workforce adjustment was in progress, there needed to be a very quick turn-around and thus, there were several high intensity executive enrolment sessions, several facilitated management sessions and several one on one coaching sessions. At this time, the department is presently implementing these findings to re-organize. **Reference; Ms Claudette Deschenes, ADM and Ms. Caroline Melis, DG**

8. ONTARIO SUPERINTENTENT OF FINANCIAL INSTITUTIONS; (July 2010 – February 2014)

Given the emerging challenges within the general economy and the continuous and almost unpredictable impacts on the banking system, as well as some structural changes within OSFI itself, the Director of the Deposit Sector wished to review his leadership team functioning and implement a set of practices which will enhance their leadership and management skills, assist them in prioritizing activities, coaching and mentoring their direct reports, and prioritizing work consistent with individual mandates.

Specific and targeted leadership coaching to directors at all levels, integrating engagement surveys into team processes and developing a culture consistent with productivity and positive work environment were the essential goals of the program. Most recently, this initiative included the newly hired senior management team to the assignment as well as a series of facilitated sessions of mandate renewal. Presently, Dr. Stevens is assisting the Sector in the implementation of some of the recommendations that emerged from the facilitated sessions. **Reference; Ben Gully, Director.**

9. PUBLIC HEALTH AGENCY OF CANADA (CCDIC). (February 2009 – June 2010)

Given the GoC's requirement for integrated planning, as well as CCDIC's need to redevelop its strategic and operational plan, Dr. Stevens was engaged to assist in the organizational development and human resource component of the redesign and implementation of the new operating model. As part of his engagement, Dr. Stevens developed and conducted a coaching for the senior executive team as well as the senior management team. These overlapping programs were designed to assist in the adoption of the new world and to deal with the emerging change management issues. Additionally, Dr. Stevens developed and facilitated enrolment sessions, values development sessions and skill building sessions to both leadership and management in the areas of transformational change, understanding personality, facilitating brainstorming sessions, developing leadership attributes and managing performance for both the executive and management teams. **Reference Dr. Howard Njoo**

10. ROYAL CANADIAN MOUNTED POLICE; Strategic Review of the Member/Employee Assistance Program, Occupational Health and Safety. (June 2009 – November 2010)

Given the stressful environment under which the RCMP carries out its daily work, they had identified the need to review the current status and functioning of their present M/EAP service delivery model against the industry best practices. Requiring a psychologist with top-secret security clearance and business consultant, Carey had been engaged to survey

the end user population, facilitate key stakeholders workshops both within the RCMP as well as with those external to the RCMP. Additionally, he brought senior RCMP Regular Members and Civilian Members to utilize the logic model as a diagnostic tool from which new service delivery models were established. The prioritization of sub-projects as well as several recommendations for a new service delivery model was also delivered. This report, as well as its supporting documents, has been reviewed by the Senior Executive Committee for implementation. **REFERENCE; INSPECTOR RICHARD HAYE**

11. UNITED STATES DEPARTMENT OF HOMELAND SECURITY – DARPA. (March 2009 – August 2009)

DARPA was the department that was responsible for several extremely high profile, high visibility and high security initiatives which operate within the Defense Department and Homeland Security. Dr. Stevens was hired to transform a team of disparate, remote and virtual team into a cohesive, integrated and high performing team. In addition, this team was comprised of several different departments and private consulting groups and Dr. Stevens was required to assist in their integration. In doing so, there were several "difficult" interviews, stakeholder and consultant enrolment sessions, as well as several briefings to senior officials. This project was terminated by the President of the United States. **Reference Unavailable at this time**

12. ROYAL CANADIAN MOUNTED POLICE EODR. (May 2009 – August 2009)

Reporting directly to the DG, Dr. Stevens was asked to review and redevelop the talent management process for the executive cadre at the RCMP. This was a most difficult assignment as discussions around moving from a "promotion" based program to a "merit" based program was of great "political" interest. Working along side of senior members, he integrated the already existing competency structure into a newly formatted talent management program. He added concepts such as defining and measuring "potential", aspirations and additional competencies. He developed the framework, facilitated the training sessions associated with implementation, developed a knowledge transfer

process so that the working team could deliver without the consultant and coached the newly formed trainers through delivery. Although his was a very concentrated initiative, several aspects of his findings have been utilized in present day success planning. **Reference; Supt. Dan Dubeau**

13. Royal Canadian Mounted Police – Human Resources (January 2008 – August 2008)

Carey was engaged by the RCMP in a leadership capacity to assist in several of their high visibility initiatives such as the development of its HR transformation strategy, HR Renewal initiatives. Additionally, he has assisted the Change Management Team responsible for the RCMP's response to the Brown Commission Inquiry. He has also provided consultations to their White Collar Crime divisions, Special Initiatives Branch and Occupational Health and Safety. For example, Dr. Stevens was engaged by the Human Resource Business Transformation Team to provide two deliverables. One was to add a transformational component to their PeopleSoft Implementation. This included change management strategies, such as leadership alignment, communication, and knowledge transfer workshops. In that capacity he developed and facilitated several process validation workshops, and strategic planning initiatives. The second deliverable was to develop the Program leadership Methodology as a "wrap around" product in support of the Project Management Methodology. **Reference; Inspector David Burrows**

14. ROYAL CANADIAN MOUNTED POLICE; Change Management Team and Culture Change (February 2008 – June 2008)

The RCMP had a directive from the Federal Government (Brown Report) to change several of its processes and essentially transform itself. In response to this government directive (Reform Implementation Committee) the Change Management Team was created to supervise and integrate all of the legislative initiatives being done by the RCMP. Dr. Stevens has been engaged by the CMT on several initiatives. Initially, he was engaged to provide on-going facilitation to the CMT itself in ensuring proper team development and in assisting them in prioritization and work unit integration. Subsequent to that he was asked to

play an advisory role to the Reducing Bureaucracy Initiative, one of the most impactful initiatives facing the RCMP. This included assisting in the strategy development and processes to ensure that the RB team was functioning at a high productive level and to provide on-going guidance to the team leaders. Work in this area included targeted focus groups, environmental scans, facilitation of working groups and the on-going coaching of the leadership team within that initiative. **Reference; Inspector Cory LeRat**

15. SERVICE CANADA (IITB). (September 2007 – June 2008)

Carey was selected to assist the IITB in their quest to be an innovative leader within the Federal government of Canada. Carey was asked to create, develop and implement as well as provide knowledge transfer activities for the first evidenced based talent segmentation process that would augment the promotion process. This process was linked to an overall coaching program and the individual learning and development plans. One of the major work streams was the facilitation of a stakeholder engagement plan to align internal and external stakeholders in advocating for the changes. Working for the ADM and his Executive Team, this was delivered and is now being considered by other government departments across Canada. This initiative was nominated for the Governor General's Award for Innovation. **Reference; Mr. Chris Brennan, ADM**

16. Public Works and Government Services Canada; Change Management (IOTB) (August 2006 – September 2007)

IOTB was required to engage several departments to bring them into the Shared Services initiative. This was a high visible program, had several political agendas and was quite controversial. It required a significant change management and customer relationship management component. Dr. Stevens was engaged to assist in the stakeholder management and communication strategy and plans and as well, assisted in the delivery of the specific work. Additionally, he was engaged to create, develop and deliver a change management program which included 8 streams of work, each including a white paper, a strategy document, a framework, an approach, a set of

tools and a set of templates. This standalone program was designed to be used throughout the Shared Services Initiative and would provide a common look and feel to all change management projects. The streams of work were 1) Project Initiation, 2) Leadership Alignment 3) Stakeholder Engagement, 4) Communication 5) Monitoring and Accountability, 6) Knowledge Transfer, 7) Prioritization, and 8) Culture Change. This 200 page deliverable has been subsequently utilized by several departments. **Reference; Mary Flynn-McRae**

17. CANADA POST CORPORATION; Talent Management. (August 2006 - September 2007)

Dr. Stevens was initially engaged as the General Manager of Corporate Leadership and Executive Development. His initial mandate was to create, develop and implement a Talent Management Process which identified, developed and deployed high potential individuals for the "Top 100" across the organization. This included the use of Employee Satisfaction Surveys, 360 Degree Assessments, and a comprehensive leadership development program. Additionally, it linked to the development and deployment of career learning and development planning. As this program became more fully developed, Dr. Stevens needed to integrate his work with other aspects of the organization such as recruitment, compensation, competency development, assessment services, staffing and executive development. It involved executives and senior leaders across the country. This mandate involved leadership alignment, stakeholder engagement, communication strategies and environmental scans. As well, it involved union issues around letter carriers and inside postal workers. As the program unfolded, Dr. Stevens developed and implemented a compensation impacting, enterprise-wide assessment of Values and the extent to which the organization was living the CPC values. As well, he led the development of a middle management learning strategy covering approximately 20K unionized employees in the areas of front line coaching, leadership and communication. Finally, Carey led the re-development of the 9-box talent segmentation grid, which integrated the developmental planning, and establishment of additional learning and development processes for the entire corporation. Carey was also

involved in several other activities such as culture change, change management, and employee engagement initiatives, all of which focused both on the development of the executive cadre as well as the front line workers. **Reference; David McIntyre, Director.**

18. PROVINCE OF NOVA SCOTIA; Leadership Development and Organizational Performance. (June 2005 – August 2005 Workshop and August 2006 Coaching.

The Deputy to the Premier of Nova Scotia wished to develop a DM "community" amongst his 21 Deputy Ministers. Working with, and directly reporting to, the Deputy to the Premier, Dr. Stevens was engaged to facilitate a 2.5 day workshop which reviewed "ideal" leadership competencies against "actuals" and develop action plans through a collaborative process, thereby beginning the development of the DM Culture. Several of the Deputies had continued with the developmental model and undertook coaching and development sessions with Carey over several years. He still maintains relationships with several of the Deputy Minister cadre. Subsequently, Carey was asked Deputy of Community Services to extend the above mentioned leadership development mandate to next level management team. Work included transferring the capability of the leadership team to the management team and attaching their developmental action plans to their performance reviews, thereby ensuring the cascading effect of the departmental strategy. Carey was subsequently engaged as a coach and advisor to the Deputy and Assistant Deputy Minister.

Reference; Howard Windsor, Ms. Kelly-Ann Dean

19. US CELLULAR, Organizational Transformation (November 2004 – January 2005)

Carey was engaged by the EVP HR as the HR practitioner on a predominately IT initiative. There he assisted in the development and deployment of a skills audit of the Office of the CIO with regard to assessing the efficiency of the IS/IT department. This work included a gap analysis between the requirements of the business against the skill base of the IS/IT department to deliver against those requirements. Work also included the impact of these findings upon the HR enabling processes

and their ability to deliver career development and succession planning. Individual coaching assignments were with the CEO, EVP Human Resources, VP Strategy and the CIO with regard to the implementation of the recommendations. Additionally, alignment sessions with the executive team and individual coaching and development sessions were conducted. **Reference: EVP HR Jeff Childs**

20. ALTERNA BANK. (December 2003 – August 2004)

Carey was engaged by, and reported directly to, the CEO as the Special Advisor to the Chief Integration Officer after a financial services merger. While the initial assignment began with an oversight mandate, the work quickly changed into more company-wide impacts, developmental planning, career management and culture integration. In addition, given his experience, Carey began to work with the technology team to develop change management strategies and methodologies. He began to lay the foundation for sales integration and worked with the performance management team in the areas of competency development. Several presentations to the Board of Directors (in camera) and other executive groups were conducted. **Reference; Josee Gallant, Chief Financial Officer**

21. IRVING OIL; Business Organizational Transformation and General Consulting Services (June 2001 – September 2012)

Initially reporting to Kenneth Irving, Carey has been a consultant for Irving Oil Corporation for approximately 20 years. He has been traditionally brought in to provide assistance in the implementation of ERP processes (Oracle), and has been part of several business transformation initiatives. The specific assignments focused on dealing with senior leadership, facilitating brainstorming sessions, awareness sessions and strategic planning sessions. Over the years he has become a trusted advisor to the senior leadership and has provided coaching and leadership development on an individual level as well as facilitating team cohesion within the context of business transformation projects. For example, under the direction of the CFO, Irving Oil wished to transform their Finance Department. Dr. Stevens was called in to develop and enhance the leadership team, facilitate alignment sessions

and team coaching and provide leadership development and coaching services for several vice presidents. Most recently, Carey was asked to work with the leadership team at the management level. At the same time, Dr. Stevens had been requested to work with some of the Sales team around sales effectiveness. **Reference; John MacKenzie, CFO, Ken Flemming, Strategic Sales.**

22. LUCENT TECHNOLOGIES / AVAYA COMMUNICATIONS / ALCATEL; (April 2000 – June 2001).

Lucent Technologies was divesting several of their subsidiaries to emerge from a potential bankruptcy which required the separation of processes and systems from the parent company. As part of that divestment, and as a requirement of the FCC, Avaya had 24 months to acquire SAP and install the system to run the company independent of Lucent Technologies. Dr. Stevens was engaged as the Leader of the Technology Adoption / Change Management / Communication / Training thread of a 23 country global SAP implementation. Generally, his responsibilities included managing a 23 country, virtual, global change management team of 200 people from different cultures, different styles and different expectations. One of the activities was to gather all 200 people and in one week, in the UK, assist in the development of cross-cultural teams, create clarity around roles and responsibilities, develop accountabilities and develop the work plan for deployment of training across these countries. Additionally, Dr. Stevens led the global team which ensured project team effectiveness strategies, communications strategies and plans, and capability transfer strategies and plans. Another significant activity was a the development and implementation of a 23 country leadership alignment work stream which essentially placed "site teams" which modeled the project team into each one of these countries and ensured not only consistency but also the alignment of the leadership team to ensure that all countries were functioning together. In doing so, Dr. Stevens was required to facilitate numerous stakeholder enrolment sessions, leadership alignment sessions and to coach and advise Global Leaders and Steering Committee members as to how they could assist in their respective countries. **Reference; Mr. Robert Emberger**

23. DELOITTE CONSULTING (February 1995-August 2005)

Carey was a Director within the Human Capital Service Line, operating within Deloitte's Canadian Eastern Region and the United States and Europe. He worked primarily with individuals, groups and organizations and has worked extensively in executive alignment, personal coaching, leadership development, team facilitation and situations of high conflict and high ambiguity, within both large and small scale projects. Dr. Stevens has specialized in working in the context of Business Transformation, Technology Adoption and HR and Performance areas within technology implementations, supply chain efficiencies and merger integrations. More recently he has worked in the area of strategy development, talent management and Sales competencies. Carey's major clients were within the areas of Telecom and Consumer Business where he worked primarily in North America and Europe serving several clients within the public and private sector. During the last 4 years with Deloitte, Carey served as the Canadian Practice leader for Change Management. **Reference; Duncan Sinclair**

24. CRIMINAL INTELLIGENCE SERVICE OF ONTARIO; (February 1995 – March 1996)

CISO required a psychologist experienced in forensics as well as a leadership, competency and training to design a competencies based leadership development program for new undercover police and their UCS partners. Dr. Stevens continued to mentor the leadership of the program after the program was transferred to the client. **No Reference Available**

25. DELOITTE CONSULTING – (March 2009 – 2012)

During a major restructuring of their regional teams, DC was required to align offices, functions and industry sectors in new ways, with new leaders, new roles and responsibilities and a new way of working together. In that sense they required an impartial, objective external consultant to provide an accurate picture of the present state of their offices, a snapshot of the readiness of the offices to change the way they carried out business, and a framework and methodology through which they could achieve their end state with a minimal disruption of business. This assignment required the

development of definitions of change, leadership clarity around visions and mandates, environmental climate descriptions, assessments of present state functioning, provision of stakeholder enrollment and engagement sessions, communication strategies and plans, as well as a series of behaviorally-based action planning and monitoring mechanisms designed to secure sustainability of the new environment. Coaching and leadership development plans were implemented to support the transformation. Process

KEY CONSULTING CLIENTS

Telecom

Lucent Technologies, Avaya Communication, Bell Mobility, Bell Canada, Citizens Utilities (Telecom), Newbridge Networks Corporation (Alcatel), Global Crossing, US Cellular Corporation

Transportation

Canadian National Railways, Bombardier

Public Sector

Industry Canada, PWGSC, Province of Manitoba, Canadian Federal Government, RCMP, Criminal Intelligence Service of Ontario, Nova Scotia Provincial Government, City of San Antonio, Canadian Nuclear Safety Administration, CSIS, HMIRC, CATSA, Canada Post Corporation, PHAC, HMIRC, Executive Counseling Center of the Public Service Commission, Citizenship and Immigration Canada, Canadian Medical Association, Elections Canada, CBSA, CSIS, CSE, and Homeland Security, Parks Canada, National Energy Board, Health Canada, Parks Canada, Public Safety

Real Estate

Cadillac Fairview, Minto, Landrex, Urbandale

Manufacturing

Parmalat, Bombardier, Clearwater Fine Foods, Andersen Windows, Lucent, Embotics, Innovapost

Energy

New Brunswick Power, Irving Oil, Hydro Quebec, Ontario Hydro

SELECTED EDUCATION

Certified Personal Fitness Instructor – Can Fit Pro – December 2017

Traumatic Incident Recovery; PTSD Treatment 2015 (Certification in Progress)

Family Law Arbitration – (Certification in Progress) 2017

***Collaborative Family Law - Level 1 (Theory)
Collaborative Family Law - Level 2 (Practice)
2017***

Alternative Dispute Resolution Institute of Ontario May 2015

Various Courses within Public Safety and Emergency Preparedness Canada – 2013 – Present

Various Courses within the Association of Certified Fraud Examiners (i.e. Cyber Fraud) 2011 – Certification 2012

University of Toronto, Rottman School of Business, Executive Program in Human Resources Management, March, 2005

Doctoral Degree in Clinical Psychology
University of Ottawa; Ottawa, Ontario, 1972-1978

Masters Degree
New School for Social Research: New York City, 1969-1971

PROFESSIONAL CERTIFICATIONS

Certification Personal Fitness Instructor

American Association of Certified Fraud Examiners

The College of Psychologists of Ontario

Canadian International Institute of Applied Negotiations

New York City Board of Education Teacher Certification

International Coaching Federation (in progress - Certificate from Erikson College)

SELECTED PUBLICATIONS

- The process of White Collar Crime: An Examination of Enron, Barings Bank and Other Corporations. 2008, In Publication
- “Unconscious Dynamics of Mediation”, Journal of the Canadian International Institute of Applied Negotiation, 1996.
- Religion as a Factor in Morality Research. Journal of Psychology and Judaism, vol. 1 (2), 1977.
- Facilitation and Growth of Ethical Moral Reasoning in a Sample of Psychiatric Residents: A Cognitive Developmental Technique.

RESEARCH

Ph.D. Thesis

"Moralization processes in samples of 15-72 year olds; a cross-sectional investigation of recognition and spontaneous production" (funded in part by the Royal Ottawa Hospital Research Fund)

M.A. Thesis

"Child rearing practices and children's self-perception: a correlation study of 7-9 year olds".

AWARDS

- Certification, Association Certified Fraud Examiners (2012)
- College of Psychology (Ontario Board of Examiners in Psychology) 1979, Psychological Registration (#1298).
- Teacher Certification, New York City Board of Education, 1969.
- Certification, Biofeedback Institute of America, (#1892).
- Dispute Resolution Centre for Ottawa-Carleton, Board of Directors, 1988.
- Ontario Psychological Association, Committee on Policy and Ethics.

PROFESSIONAL AFFILIATIONS

- American Psychological Association.
 - Canadian Psychological Association.
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- American Association of Certified Fraud Examiners
- College of Psychology
- CanFit Pro

SECURITY CLEARANCE AND CITIZENSHIPS;

Dual Citizen – Canada, USA

Top Secret+ (NATO) Clearance – CSIS

Secret Security Clearance – RCMP

Various Other Clearances: CBSA, Bank of Canada, National Energy Board

PERSONAL ACCOMPLISHMENTS

Married 50 years; 2 children; 2 grandchildren; 17 Marathons; 10 Triathlons

Integration of the Psychological, Business and Physical in moving towards integrated health in individuals and organizations

