



The Cleveland
Leadership Group

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Summary of Career:

2004- Chief Executive Officer of Cleveland Leadership Group Inc.

1994-2004 Office Managing Partner of Ernst & Young, Ottawa office, Senior Vice-President of Ernst & Young Inc. (Corporate Advisory Group), Responsibilities include management of a full service office in excess of 125 people. Ongoing partner responsibilities include strategic planning and senior management advice to multinational clients as well as corporate restructurings and corporate finance assignments for clients.

1993-1994 Assistant Office Managing Partner of Ernst & Young, Ottawa office. Responsibilities included assistance in delivery of all aspects of public accounting and the management of a full service office in excess of 125 people. Ongoing partner responsibilities included strategic planning and senior management advice to multinational clients.

1993 A member of the Management Consulting Policy Committee for Ernst & Young in Canada. This committee developed professional policy,

standards of conduct, and guidelines for practicing management consulting with the Canadian firm.

- 1992-1994 Practice Director of Ernst & Young Consulting. The Consulting practice delivered multi-discipline assignments for both public and private sector clients — ranging from accounting, marketing, business policy, business process improvement and human resource strategies to overall strategic planning and evaluation audits of government programs.
- 1987-1994 Senior Vice-President of Ernst & Young Inc. (Insolvency Group), Practice Director of Ernst & Young Inc., Partner of Ernst & Young. The Insolvency practice utilizes the skills of a chartered accountant to restructure and reorganize companies with poor profit records or continuous losses. A number of assignments have been completed in retail, service, construction and high technology business sectors.

1984 - 1987 Calgary, Alberta

- 1984-1987 Vice-President of Clarkson Gordon Inc., Partner of Clarkson Gordon and Woods Gordon. Together with one other partner, responsibilities included the liquidation, receivership, bankruptcy and financial reorganization administration of a number of companies in the oil and gas, engineering, hospitality and retail industry sectors. A major geophysical company assignment included managing assets in Canada, United States and Great Britain, while another required the sale of gas interests in Australia.

1981 - 1984 Ottawa, Ontario

- 1982-1984 Vice-President of Clarkson Gordon Inc., Partner of Clarkson Gordon and Woods Gordon. Responsibilities included the reorganization, bankruptcy, and receivership administration of high technology, manufacturing, wholesale, civil construction and hospital industries.
- 1981 Insolvency Manager, Clarkson Gordon Inc.

1976 - 1981 Halifax, Nova Scotia

- 1976-1981 Insolvency Manager, Clarkson Gordon Inc.
- 1972-1976 Student and Chartered Accountant, Clarkson Gordon.

Business Experience:

Up to the time of attaining the Chartered Accountant designation in 1975, experience was focused on auditing companies and other organizations. This included special forensic work in the fishing industry during the cod stock crisis on the east coast of Canada.

From 1976 to 1981, experience was focused on practising insolvency and financial turnarounds in all industries on the east coast of Canada. Professional activity primarily

consisted of managing corporations in financial difficulty for financial institutions; valuing and negotiating the sale of businesses.

From 1981 to 1984, experience was concentrated on automotive franchises in the Ottawa area due to failures from high interest rates at the time. During this period General Motors, Ford, Chrysler and American Motors franchises were managed, valued and sold.

From 1984-1987, experience was dominated by managing, valuing and selling oil and gas, financially troubled, related companies in Calgary.

In 1987 a move back to Ottawa was made first to rebuild the insolvency practice; the management consulting practice. This period to 2004 focused on strategic planning, valuations, change management, organization design, financial turnarounds and special projects.

In 2004, Cleveland Leadership Group Inc. was created as a Business Strategy Firm focused on assisting companies to:

- Set visions, missions and values;
- Develop strategic and tactical;
- Implement plans;
- Develop reward systems;
- Manage succession planning;
- Negotiate management and other buyouts;
- Conduct valuations;
- Coach senior leaders;
- Manage revenue and profit growth.

Education:

Institute Memberships:

1975	Institute of Chartered Accountants of Nova Scotia
1981	Institute of Chartered Accountants of Ontario
1984	Institute of Chartered Accountants of Alberta
1994	Elected to Fellowship in Institute of Chartered Accountants of Ontario

Academic Achievements:

2003	Governance and Director's Forum at Stanford Law School.
1993	Canadian Association of Insolvency And Restructuring Professionals (CAIRP) — a membership degree granted to those in good standing with the Canadian Association of Insolvency and Restructuring Professionals.
1993	Certified Fraud Examiner, Association of Certified Fraud Examiners.

- 1979 Trustee in Bankruptcy license, from Consumer and Corporate Affairs.
- 1972 Bachelor of Business Administration, Acadia University, Nova Scotia, with core focus on accounting, general management and economics.

Other Achievements:

- 2009- Chairman of the fundraising cabinet for the Elisabeth Bruyere Geriatric Hospital.
- 2004- 2009 Co-Chair of the fundraising cabinet for the Ottawa Hospital Foundation.
- 2003- 2004 Member of the fundraising cabinet for the Ottawa Hospital Foundation.
- 1999- 2004 Member of the Discipline Committee for The Institute of Chartered Accountants of Ontario. This committee is a judicial panel charged with the responsibility of determining the guilt or innocence of those members of the profession who may be charged with improper conduct by The Professional Conduct Committee. In the case of guilty determinations the panel also determines the appropriate sentencing.
- 1997- 2003 Director of United Way/Centraide Ottawa-Carleton.
- 1997 Chair of the Task Force on Board Functioning of United Way/Centraide Ottawa-Carleton. This task force’s mandate is to examine various issues associated with the manner in which the Board of Directors carries out its governance role.
- 1996 Campaign Chair of United Way/Centraide Ottawa-Carleton. The campaign was extremely successful, being the first campaign in eleven years to meet its goal (\$12.6 million) on Touchdown Night. He accomplished this by providing strong leadership to the Campaign Cabinet of 22 people responsible for 14,000 volunteers. He reorganized the Cabinet, creating an industry focus, adding home-based business and aligning Cabinet and Campaign posts to the donation market. Approximately 500-600 hours were spent in accomplishing this goal.
- 1993-1994 Division Chairperson for Major Corporate Accounts, United Way/Centraide Ottawa-Carleton. Division Chairperson is responsible for managing corporate and employee fundraising activities of approximately four industry section chairpersons, canvassing in excess of fifteen major employers in Ottawa, for approximately \$1.3 million.
- 1993-1995 Nominated by the Superintendent of Bankruptcy to represent the profession’s Joint Committee on Bankruptcy on the Bankruptcy/Insolvency Advisory Committee (BIAC) — with Industry Science Canada (formerly Consumer and Corporate Affairs Canada). This was a committee of approximately twenty senior professional and business

- people, chaired by the deputy minister, to monitor the effectiveness of the Bankruptcy and Insolvency Act and to advise the Minister of Industry Science Canada concerning future amendments to the legislation.
- 1992-1995 Member of the Joint Committee on Bankruptcy between the Superintendent of Bankruptcy and the insolvency profession. The Committee is responsible for reviewing policy matters between the Superintendent of Bankruptcy and the profession, to assist in drafting policy directives and to advise the Superintendent on day-to-day matters affecting the administration of the Bankruptcy and Insolvency Act.
- 1991-1993 Section Chairperson for Finance, United Way/Centraide Ottawa-Carleton.
1990 Member of the Provincial Advisory Committee for the Ontario Insolvency Association — a one-year appointment to discuss professional matters and suggest policy for insolvency practitioners in Ontario.
- 1989 Member of Committee for the Acquisition of the William Pinch Mineral Collection, National Museum of Natural Sciences. This committee was responsible for raising in excess of \$5 million to purchase a rare mineral collection for display at the National Museum.
- 1989 Treasurer and member of Board of Stewarts, Riverside United Church, Ottawa, Ontario. As Treasurer, he was responsible for encouraging donations in excess of \$200,000 annually to fund operations. He led a special project to review and advise the Church on creative fund-raising activities to revitalize the congregation.
- 1986-1987 Chairperson of Board of Directors of Calgary Women’s Emergency Shelter, Calgary, Alberta. As the first male chairperson of this battered women’s shelter, he debated on live media with the Provincial Government Minister responsible for funding women’s shelters for increased funding, successfully led a delegation of all women’s shelters to the Alberta government to get increased funding, oversaw the construction of a new shelter and acted as Chief Executive Officer overseeing day-to-day financial operations. This shelter had in excess of 20 beds. Approximately 500-600 hours were spent in accomplishing these goals.
- 1986-1987 Treasurer and member of Board of Directors of Theatre Calgary, Calgary, Alberta. During the year, the Board presided over fundraising activities; rent negotiations in the new performing arts center, and the control of obligations. Each Board Member was required to host at least one evening at the theatre.
- 1985 Director and Treasurer of Calgary Women’s Emergency Shelter, Calgary, Alberta — responsible for all accounting, asset preservation, payment of liabilities and negotiations with the Government of Alberta and the United Way for funding.

- 1985 Member of the fund-raising committee for the Calgary Centre for the Performing Arts, Calgary, Alberta. This committee concerned itself with all means of raising funds to eliminate the theatre's deficit.
- 1984 Director of the Ottawa Chapter of the Canadian National Institute for the Blind, Ottawa, Ontario. During this one-year appointment, the Ottawa Chapter advanced the needs of the blind through education in the community, fundraising events and lobbying for human rights.
- 1979-1980 Director of Able Courier Services Ltd., a company incorporated to employ disabled persons, Halifax, Nova Scotia. This company employed only those people who were unable to obtain employment elsewhere because of their handicap. The Board managed the affairs of the company and set policy for operations and community involvement.
- 1976-1977 Chairman of the Board of Trade Transportation Sub-Committee of Civic Affairs, Halifax, Nova Scotia. This was a one-year appointment to a committee responsible for monitoring any proposed changes by government to roads, trains, and bus and water routes. It advised the Halifax Board of Trade of the effects of such changes on local business.
- 1976-1977 Advisor to high school students in Junior Achievement, Halifax, Nova Scotia. As advisor for an appointed one-year term, he assisted teens to understand complex aspects of incorporating a company, manufacturing a product and earning a profit.
- 1976 Member of the Halifax Board of Trade Civic Affairs Committee, Halifax, Nova Scotia. For the year's term, he held a seat on this committee designed to discuss and advise the Halifax Board of Trade concerning the effects of civic policy on business throughout the area.
- 1973-1976 Assistance in devising and refining an accounting system for the Halifax Branch of the Canadian Association for the Mentally Retarded for a three-year term.

BOOKS:

- *50 Steps To Business Success: Entrepreneurial Leadership in Manageable Bites*, published in the fall of 2002, is a master plan for those who want to know the dynamic, proven techniques that business leaders — from fruit stand owners to the Fortune 500 chairman — must use to build a successful entrepreneurial enterprise. At the heart of this program is a constant quest to improve the conduct of the business, from mission statements to the simplest of action plans. Each principle, or "bite," is a business fundamental that every business leader needs to integrate in his or her organization.

- *Corporate Ladders, Human Rungs*, Canada, 1992, is a satire for those climbing the corporate ladder. "This is a self-help book with a different angle. It uses fictitious characters, actual experiences, and a good dash of humour to draw a map for corporate success in the '90's." CA Magazine, November 1992. Published by Creative Bound.
- *Money, The Root of All Happiness*, Canada, 1990, is a satire history of the development of money and its terms from biblical times forward to the year 2051. Published by Creative Bound.
- *The 737 Papers*, United States, 1989, is a satirical look at the human thought process. Arguing there are nine dimensions of thought, the book proceeds to poke fun at each dimension.

ARTICLES:

- "For God's Sake Leave Us Alone", Canada Today, March 12, 1992
- "Prudent Planning", Ottawa Business Magazine, Jan. /Feb. 1992
- "Shopping for Advice", Ottawa Business Magazine, Nov. /Dec. 1991
- "Seducing Your Banker", Ottawa Business Magazine, Oct. 1991
- "Just Desserts", Ottawa Business Magazine, Sept. 1991
- "Firm Foundations", Ottawa Business Magazine, July/Aug. 1991
- "Kiss of Death", Ottawa Business Magazine, May/June 1991
- "Devouring the GST", Ottawa Business Magazine, April 1991
- "Full Steam Ahead", Ottawa Business Magazine, March 1991
- "Planning for Survival Essential in Today's Borderless Economy", Ottawa Business News, June 1990
- "Early Warning Signals of Business Failures", Alberta Business, April 1987
- "Beyond the Balance Sheet - Turning Losers into Winners", Canadian Bankers Magazine, June 1985, reprinted for the Institute of Bankers of Malaysia

MEDIA:

Numerous interviews for television, radio and printed media over many years for book releases, financial restructurings and The United Way.