

Institute for
Global Ethics
Ethical Fitness® for a Better World



A N N U A L
R E P O R T
2 0 0 6

M I S S I O N

TO PROMOTE

ETHICAL BEHAVIOR IN INDIVIDUALS,
INSTITUTIONS, AND NATIONS THROUGH
RESEARCH, PUBLIC DISCOURSE,
AND PRACTICAL ACTION

ETHICAL FITNESS[®] FOR A BETTER WORLD

REPORTS

PRESIDENT & FOUNDER

AS FREQUENT TRAVELERS KNOW, the airlines have given us an apt guideline for ethical living: If oxygen masks drop down, we're told to put on our own mask first before helping others. That instruction may seem selfish. But the logic is unavoidable. Unless we keep ourselves strong, we can't serve others in times of challenge.

In an era of deepening public concern about ethics, the Institute for Global Ethics is serving others in practical, effective ways. This report highlights that external work. But this year we've also strengthened ourselves internally in three key ways.

First, our board has elected a chair other than me—something I've long been urging. I'm delighted that Cole Wilbur—founding president of the David and Lucile Packard Foundation, and one of the world's most respected leaders in global philanthropy—has agreed to serve in this role. His letter in the adjacent column helps introduce this report.

Second, Graham Phaup, our executive director, has taken up full responsibilities as chief executive officer, working closely with me but reporting directly to the board—another move I've long advocated. These moves position us for sustainability and promote succession over the long term.

These changes also have the immediate benefit of letting me plunge more deeply into the third area: creating new conceptual thinking on the topic of *cultures of integrity*, perhaps the most complex subject we've ever addressed. In our first 16 years, we focused primarily on personal ethics—individual values, choices, and expressions of courage. We're now turning to collective ethics—how entire organizations create cultures that strengthen the ethics of the people who comprise them.

As we strengthen our own understanding of this topic, we're better positioned to help others build cultures of integrity. As you'll see in these pages, that work is already under way. Building our inner and structural strength, the Institute is increasingly able to fulfill our outward and social mission of promoting ethical behavior in individuals, institutions, and nations.

—Rushworth M. Kidder

BOARD CHAIR

ONE PART OF MY 30+ YEARS of work in the world of philanthropy has been to evaluate nonprofit organizations' potential and their ability to achieve their mission. The Institute for Global Ethics is a uniquely successful endeavor that has witnessed growing public concern about ethics and values since its founding 16 years ago. We have many opportunities to help improve the attention to ethics in today's world, and we are needed more than ever.

Our Center for Corporate Ethics, working with clients like BD (Becton, Dickinson and Company), PepsiCo, SC Johnson, MetLife, Accenture, Legal Sea Foods and others, has introduced the Institute's core concepts of moral reasoning and ethical decision making to tens of thousands of employees in over 50 countries.

Our work with government, international and news organizations embraces the U.S. Coast Guard, the U.S. Navy, Reuters, the BBC, the World Bank and parts of the UN in New York. We've worked closely with public and private schools in the U.S., Canada, and U.K. In the United States our work includes helping the National Association of Independent Schools and the National Association of State Boards of Education, as well as many school districts.

Another example of the Institute's well-placed position to deliver its framework for ethical thinking through rapidly-evolving communications technologies is *Ethics Newsline*[™], the Institute for Global Ethics' weekly, online ethics news digest and commentary service. With more than 8,000 weekly subscribers in 126 countries, *Ethics Newsline* plays a central role in building an international constituency for ethics.

As you read through this report you will gain a clear understanding of the strategic foundation the board and staff are building to secure the future of the Institute. I'm grateful to my fellow board members, the dedicated staff, and our supporters who remain faithful to our mission, striving to discover and define the global common ground of shared values and establish clear structures for moral reasoning and ethical decision making.

—Colburn S. Wilbur

REPORTS

EXECUTIVE DIRECTOR

WE HAVE COMPLETED the first three years of a long-range plan. In the early days, the Institute concentrated its energy and talent on developing conceptual materials. Like many new organizations, our methods were largely entrepreneurial, and at times boldly adventuresome! About five years ago, the board embarked on a strategic approach to our continued growth. Since March 2003 we have based our work on this long-range plan. At times, the transition has not been easy, but we have learned the value of planning in order to grow our business. We adopted the following five strategies:

- Solidify the Core Program
- Develop New Knowledge about Ethics in a Global Context
- Develop New Products and Market Sectors
- Develop New Distribution Channels
- Evaluate and Improve the Institute's Organizational Infrastructure

In previous reports, we have given you a sample of many activities—talks, training sessions, surveys, and consulting. This year, we wanted to present you with the effectiveness of the plan, focusing primarily on the financial year that ended on May 31, 2006. Each section deals with one of our five strategies, highlighting the implementation plans. Testimonials from clients, partners, supporters, and friends attest to the impact of our programs. Planning is evolutionary; rarely do plans stay the course. It is time to reassess our strategies for the next three to five years. The plan just completed encouraged us to focus on our core strengths in the countries in which we have a presence—Canada, the U.K., and the U.S.

In conclusion, let me say how grateful I am to our board of directors for the guidance they have provided this past year. No report would be complete without our sincere expression of thanks to our donors and to the foundations—particularly the David and Lucile Packard Foundation, Ethics and Excellence in Journalism Foundation, Knight Foundation, and the John Templeton Foundation—who supported us this year. Finally, I am grateful to the staff for their dedication to the Institute.

—Graham Phaup

IN ADDITION TO THE MISSION, which is the primary driver of all of the Institute's strategies, there are key strengths, weaknesses, opportunities, and threats that act as important drivers in our planning. The strategic decisions outlined in this annual report reflect the choices most likely to enable the Institute to meet our performance standards.

The most successful approach to growing a business is to consolidate the core and extend out from it. The further one expands from the core, the greater the risk. Abandoning the core and just extending outward is the major cause of business failures.

This plan concentrates on solidifying the Institute's core activities, and invests modestly in expanding that core through closely-related projects. The plan contains no completely new and unrelated projects in the baseline plan. At the same time, there are new initiatives being developed that will serve as a guide for seeking future funding.

GROWTH PLAN

Product and Service Development

WHAT do we offer?

Market Development

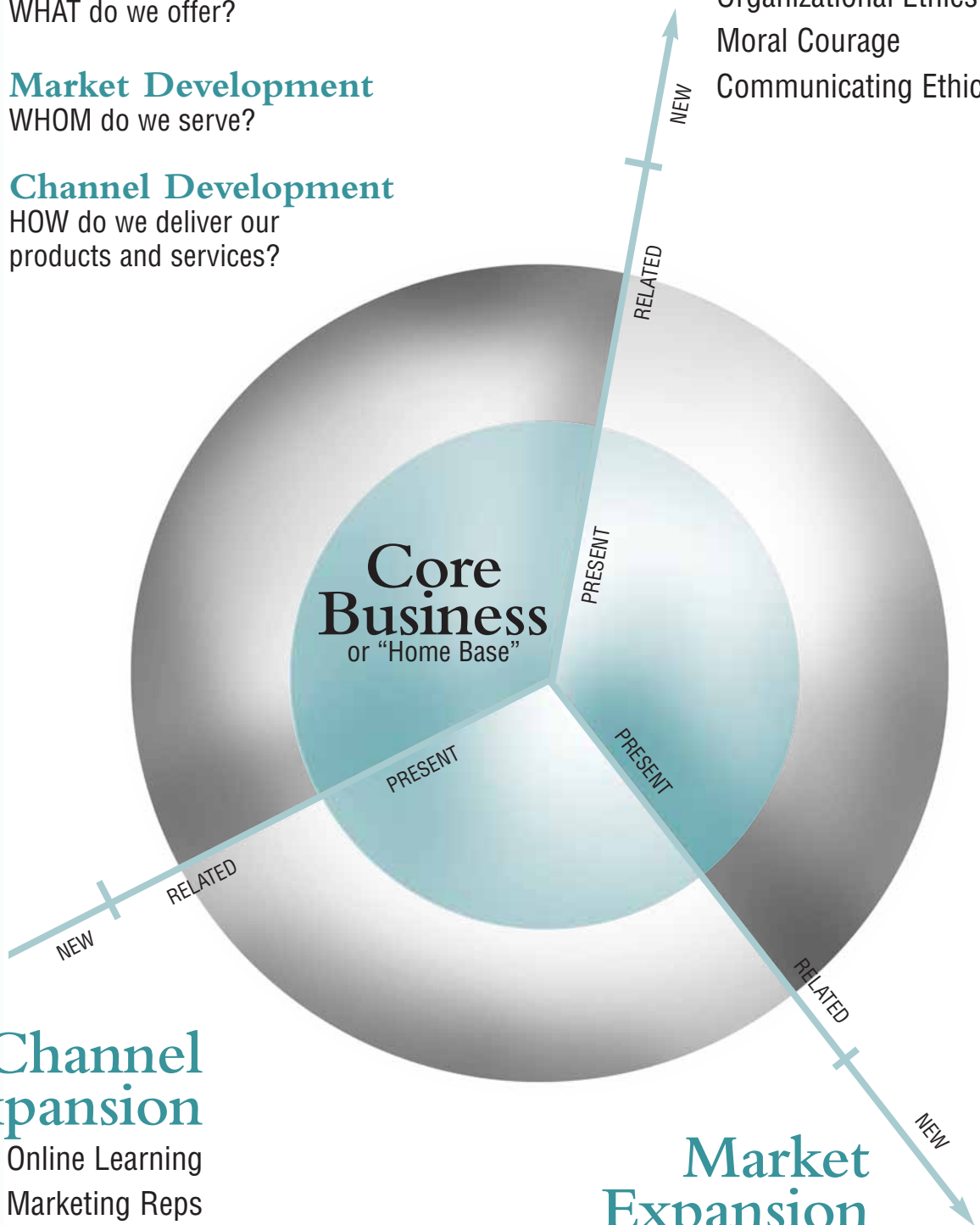
WHOM do we serve?

Channel Development

HOW do we deliver our products and services?

Product Expansion

Organizational Ethics
Moral Courage
Communicating Ethics



Channel Expansion

Online Learning
Marketing Reps
Syndication

Market Expansion

Online Training Customers
Family-owned Businesses
Independent Schools

1 Solidifying the Program Core

Solidify and maintain the Institute's core programs, services, and markets. Maintain core distribution channels; assess regularly.

Solidifying the core represents the heart and soul of the Institute's activity—providing the tools that improve ethical decision making in our key sectors, business and education. From the beginning, we have taught engaging training programs, provided consulting to clients, and delivered talks to a wide range of audiences. The following is by no means the complete picture, but is a representative sample of how we have grown the core business this year:

Ethics Newslines™

Ethics Newslines™ readership has grown by almost 15 percent during the year and is now received by over 8,000 people each week in 126 countries. Its weekly summaries of the world's top ethics news are popular with ethics professionals and educators. In this year alone, *Ethics Newslines's* web site visits have grown nearly 200 percent to a rate of about 4 million per year. We added two new user-friendly features—a mechanism for printable copies and a send-to-a-friend capability. We have also added sponsorship logos to the *Ethics Newslines* web page as corporate support for the program grows.

*“Weekly reading of *Ethics Newslines* has helped me change my perspective on matters. Whether it is reading the daily paper, dealing with my coworkers, being involved with my daughter's public education, I look for the right and wrong of decisions and situations. *Ethics Newslines* has helped me form my ethics baseline and continued reading helps me keep it solid.”*

Ethics Newslines Subscriber

Talks

In conjunction with Washington Speakers Bureau, Rushworth Kidder delivered 11 talks, including keynote addresses to a wide array of audiences that included the U.S. Naval Academy, American Association of School Administrators, Amherst College,

Association of Corporate Travel Executives, Council on Foundations Grantmakers Summit, Federal Aviation Administration, Concours Group, the Association of Chartered Accountants, and PepsiCo.



Seminars

In addition to training provided by licensed trainers, our staff delivered over 20 training events during the year, including Ethical Fitness® seminars, Moral Courage seminars, and Train-the-Trainers. These events took place in Boston and Cambridge, MA; Buffalo and Troy, NY; Newport, OR; Racine, WI; Newport Beach, CA; Indianapolis, IN; San Antonio, TX; Hartford and New London, CT; Richmond, VA; Camden, ME; in Canada, in Toronto, ON, and Vancouver, BC; and in the U.K. Certified trainers, employed by a single multinational corporate client, have presented the Ethical Fitness® Seminar to over 1500 staffers around the globe.

“Rush, thank you for playing such an important role in our symposium and the board meeting. Your comments on universal values and moral perimeter, among many other topics, were well received by all who attended. You helped our board come to grips with some key values issues.”

John Edwin Mroz
President and CEO
EastWest Institute

Electronic Training

In association with Midi, a leading provider of web-based ethics and compliance training headquartered in Plainsboro, NJ, the Institute delivered ethics training to several leading corporations. This channel provides significant numbers of employees within each of these corporate clients who are learning the Institute's decision-making frameworks. In addition, over 100,000 employees of an international financial services corporation have completed a web-based, electronic version of the Ethical Fitness® Seminar.

"I would say that people who go through the training will be affected in profound ways. It makes us look at our own behavior and it puts the ultimate responsibility where it belongs, at the individual level. This program allows the dialogue to take place in a way that fosters understanding and communication. It is a powerful life-changing process. It won't happen overnight, but it will happen."

Lori Vollandt
Teacher

John Marshall High School

Bookstore

A paperback edition of *Moral Courage* was published in 2006 and added to the Institute's bookstore products. *Moral Courage* and *Tough Choices* continue to represent our best-selling products. Net sales for the year, including royalties, totaled about \$100,000.

Grants

U.S. foundations contributed over \$300,000 in grants to support program development and the general activities of the Institute. We remain grateful to these foundations.

2 Developing New Knowledge about Ethics in a Global Context

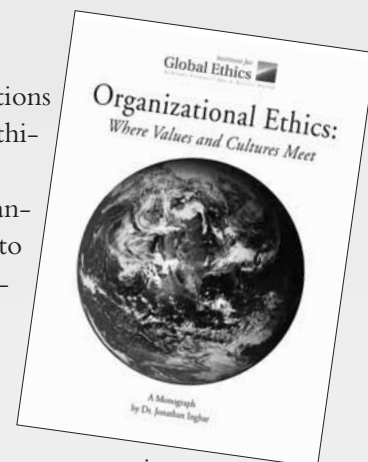
Gather information, analyze trends, and disseminate findings.

In some ways, this remains the Institute's most challenging strategy. Our top priority has been to solidify core programs and activity. Exploring trends and analyzing their meaning has proved a fiscal challenge to sustain. However, the strategy remains important to us, and we have taken some fundamental steps during the year to develop this strategy. These have focused primarily on cultures of integrity: exploring and determining how model corporations integrate positive ethical values and practices into the day-to-day and long-term cultures of their organizations.

Cultures of Integrity

We hypothesize that organizations express, analyze, and resolve ethical problems differently from individuals. Furthermore, organizations—whether they want to or not—provide a cultural setting within which their individual members work. This setting may or may not be conducive to ethical decision making and ethical actions. In some organizations, people are clearly important and valued, while at the others they seem less valued. The environmental impact of one company's work processes is addressed with attention and a sense of responsibility, while other companies invest in obfuscation and evasion.

What are the requisites for an ethical culture? How can an organization's members incorporate the language of ethics into their day-to-day work? What conversations must be encouraged and what processes utilized to build community within the organization? To address these questions, the Insti-



Developing New Knowledge continued...

tute embarked this year on a new field of exploration, which we are currently calling *Cultures of Integrity*. The steps taken this year led us to a series of interviews—initially with business leaders—that illustrate and exemplify current practices that encourage and promote sound ethical judgment. Some of these organizations have firmly established their culture and reputation over decades; others are more cutting-edge entrepreneurs. As we deepen our understanding around how *cultures of integrity* are established, grow, and thrive, a bank of new knowledge will accrue to the Institute. Books, conferences, and other marketable products will follow with broad application in both of our key sectors—business and education.

“We live in a time when the products of our private and governmental organizations have become so technologically powerful that they can have almost instantaneous national or global effects. The size of these organizations and the reach of these technologies mean that ethical failures can have worldwide consequences. That’s why an understanding of organizational ethics and culture is so crucial now.”

Jonathan Ingbar
from *Organizational Ethics: Where Values
and Culture Meet*; Institute for Global
Ethics; Camden, ME ©2004

3 Develop New Products and Market Sectors

Strategically develop and test new products and services to meet present and future client needs, in new and existing markets.

The Institute strives to introduce at least one new product annually. We have brought new training materials—including books, trainer manuals, DVDs and CD-ROMs—to market. A comprehensive list of products is on our web site, along with a catalog of our services. In this past year, we have developed the following new materials:



Ethics in Print

Through the generous sponsorship of the Ethics and Excellence in Journalism Foundation and The Rockefeller Brothers Fund, the Institute for Global Ethics convened 15 journalists for a conference entitled *Ethics in Print*. The event was held at the Pocantico Conference Center, part of the Rockefeller estate about 30 miles north of New York City.

The conference focused on identifying ethical issues and stories and writing about them with an ethical perspective. In workshops participants developed a checklist of key attributes useful for editors and writers in spotting stories most effectively written in the language of ethics, and created six-month

personal action plans to produce a clip file of stories on ethical issues. The event itself is a new service for us. Plans are in the works for a similar event in the Midwest next year.

“Journalists crave this type of discussion. We need more of this in our profession.”

Jeannine Guttman
Editor & Vice President
Portland Press Herald/Maine Sunday Telegram

“I really valued the time to be able to spend on these issues. The conversations were insightful and challenging; just what I needed.”

Angie Newsome
Investigative/Enterprise Reporter
Asheville Citizen-Times

Corporate Values Survey

As part of our offerings from the Center for Corporate Ethics, we designed a corporate values assessment survey. The corporate survey is designed to assess a company’s ethical climate, and we now have the capability to deliver the survey and analyze it online. The survey provided the keystone for our work with the City of Jacksonville, Florida, and is now being studied for use by a Fortune 500 corporation.



Moral Courage Seminars

The concepts developed in the writing of the book *Moral Courage* have enriched many of our teaching materials and training sessions. Rushworth Kidder hosted a number of Moral Courage Seminars during the year. Among those attending

were representatives from Columbia Healthcare Analytics, Inc., St. John’s Episcopal School, the University of New Mexico, the City of San Diego, the National Association of Independent Schools, Washington College, U.S. Navy chaplains, the Department of State, the U.S. Holocaust Memorial Museum, and the United States Mint.

“The Moral Courage Seminar was engaging and relevant. In my work as vice-principal of a secondary school, where our mandate is to build an ethical culture for our leaders of tomorrow, the frameworks and commitment that I came away with will be invaluable.”

Philipine Pereira
West Vancouver School District
West Vancouver, British Columbia

Ethics and Parenting

Responding to requests from Institute members, we laid plans this year to integrate a program on *Ethics and Parenting*. It goes without saying that parenting is under stress these days. From where we stand, that stress has an ethical component: Parents often lack the tools, the opportunities, and the moral courage to talk about ethical issues with their children. So how can we build a world where parents feel comfortable having this discussion—and where children respond and build strong habits of moral character as a result?

The Institute convened focus groups in San Francisco and Palo Alto with a goal of providing parents with an effective, robust language of ethics that doesn’t sound preachy, old-fashioned, or naïve. Through that language, parents learn to spot, define, unpack, and discuss ethical issues in their children’s lives.

“My father was a key influence on shaping my values as I grew up. As a father today, I need to set solid personal examples as well as be able to talk about values and integrity with my children.”

Jesse Cottonham
San Francisco, CA
profiled in *Moral Courage*
Ethics and Parenting focus group participant

4 Develop New Distribution Channels

Strategically develop and test new channels of distribution to extend impact as far as possible.

We are proud of the high caliber of content we provide to a diverse client base. Our programs are content-rich, and when we discover alignment with the right distribution channels, things begin to happen. In the past year these three client relationships illustrate the usefulness of vibrant distribution channels for IGE content:

Founded in 1851, Reuters is a global information company providing indispensable information tailored for professionals in the financial services, media, and corporate markets. Since 2004 Reuters has trained their bureau chiefs with the Institute for Global Ethics' Ethical Fitness® Seminar. Over 2,000 Reuters staffers have participated in an ethical-decision-making session.

"In today's rapid-fire environment of electronic journalism, Reuters seeks to uphold the same rigorous standards for honesty and fairness in our reporting and interpreting the news that has characterized our work for the last 155 years. The Institute for Global Ethics has helped us greatly in this endeavor."

Martin Langfield
Global Head of Learning, Editorial
Reuters

The Florida Association of Insurance Agents (FAIA) has been promoting a healthy and competitive insurance environment for 102 years. FAIA currently serves 1500 independent member insurance agencies representing between 13,000 and 14,000 agents in the state. After evaluating all

options, FAIA selected the Institute for Global Ethics as the content provider for their ethics training. IGE certified master trainer, William Perkins, has trained over 700 FAIA member agents to date.

"Ethics is an important component of our professional and personal lives. It defines the standards by which we live. With an intangible product like insurance, customers depend on the highest level of ethics and professionalism from our agents. Ethics defines how customers are advised by our member agents. The ideas and frameworks offered by the Institute for Global Ethics are a good fit for the requirements for FAIA professional education."

Lisa Harrington
Vice President of Education
Florida Association of Insurance Agents

In 2005 IGE formed a partnership with Midi, a training company that produces high-impact ethics and compliance learning solutions. Through a licensing agreement, the Institute has furnished the frameworks and content for online training programs marketed by Midi. A variety of interactive scenarios are used from a cross section of industries for practice and reinforcement of the model. The distribution channel opens the way for IGE ideas to reach a huge international audience. Through an additional electronic training arrangement, over 100,000 employees have been trained worldwide in one corporation alone.

"Ideas and knowledge from the Institute for Global Ethics are helping Accenture to communicate and infuse our core values throughout our international team. This partnership is producing broad-reaching, effective results for us."

Jay Mumford
Ethics and Compliance Manager
Accenture

5 Evaluate and Improve the Institute's Organizational Infrastructure

Increase efficiency, effectiveness and quality of service to the Institute's mission and program goals.

We made significant progress during the year in implementing this strategy, which has been in place for the past three years. With affiliates in the United Kingdom and Canada, our operations can occasionally involve a complexity that, at first glance, would not be obvious from the size of our budget. During the year, we have made significant progress in the following:

Intellectual property

Key concepts developed by Rushworth Kidder and other members of the Institute's staff represent the Institute's strongest long-term asset. In conjunction with Alfred Frawley of Preti Flaherty, we conducted an audit of the Institute's intellectual property and have started to implement the report's recommendations.

"We have been working with intellectual property counsel Alfred Frawley to standardize our approach to the development and use of our IP assets. These actions will provide lasting value and important revenue benefits to the Institute."

Graham Phaup
Executive Director
Institute for Global Ethics

Web site

Until this year our web site had remained, in essence, unchanged since we first developed the site www.globalethics.org. It was rather like a perennial garden gone to seed—all the plants were in there, but it proved difficult to manage and navigate. With a fresh, clean design, rich content, and straightforward navigation tools traffic is up and users tell us how much they like the new site.

Conflict of interest policy

We developed a conflict of interest (COI) policy for board members this year. Upon agreement, the policy was implemented, along with a strengthening of staff COI procedures.

Administration

Among the multifarious activities of our administrative office was helping to accommodate the move of the Canadian operation from Toronto to Vancouver. Financial reports, audit, and preparation of contracts all took shape.

Donations

We remain grateful for each donation—large and small—that came our way this year. Through government contracts, foundation grants, and individual donations we have received gifts and grants that help to strengthen and extend our reach.

Center for Corporate Ethics

We like the new name, the Center for Corporate Ethics, for our business division. We maintain a satellite office in New York City, where we regularly convene meetings of the Tri-State Ethics Forum.

FINANCIAL

STATEMENT OF ACTIVITIES

for the year ended May 31, 2006

EXPENSES

Program Services

Character Education	\$ 158,902
Corporate and Foundation Services	333,282
Communications	104,634
International Operations	693,253
Special Projects	204,556
	<u>1,494,627</u>

Supporting Services

General Administration	548,362
Development	288,489
	<u>836,851</u>

TOTAL EXPENSES	\$ <u>2,331,478</u>
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SUPPORT AND REVENUE

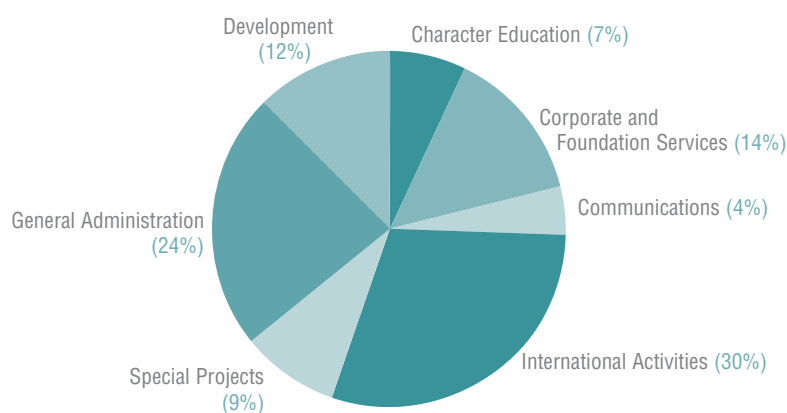
Support: Contributions, Memberships, and Grant Reviw Released from Restriction	\$ 1,909,065
Revenue: Fees, Sales, etc. (net of adjustments)	839,437

TOTAL SUPPORT AND REVENUE	\$ <u>2,748,502</u>
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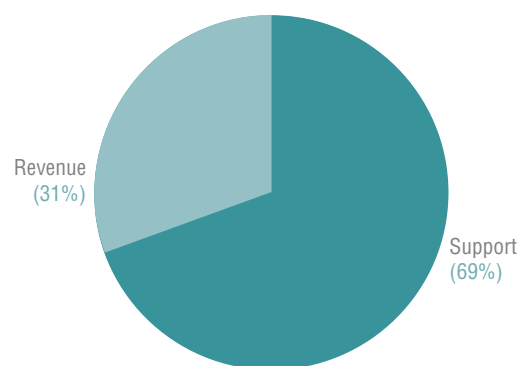
CHANGES IN NET ASSETS

Increase in Unrestricted Net Assets before Foreign Currency Translation	\$ 417,024
Effect of Foreign Currency Translation	34,611
Increase in Unrestricted Net Assets After Foreign Currency Translation	\$ 451,635
Increase (Decrease) in Temporarily Restricted Net Assets	(10,214)
Increase in Permanently Restricted Net Assets	250

TOTAL CHANGE IN NET ASSETS	\$ <u><u>441,671</u></u>
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EXPENSES



SUPPORT AND REVENUE

HIGHLIGHTS

STATEMENT OF FINANCIAL POSITION

as of May 31, 2006

ASSETS

Current

Cash	\$ 867,564
Certificate of Deposit	453,869
Accounts Receivable	143,834
Grants and Pledges Receivable	210,300
Prepaid Expenses	42,236
Inventories	28,775
	<hr/>
	1,746,578

Fixed Assets

Property and Equipment (net)	41,049
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Other Assets

Certificates of Deposit	100,000
Endowment Investment Money Market	13,400

TOTAL ASSETS	\$ 1,901,027
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LIABILITIES

Current

Accounts Payable	\$ 71,912
Deferred Revenues	34,639
Other Liabilities	58,595
	<hr/>
	165,146

Long-Term Liabilities

0

TOTAL LIABILITIES	\$ 165,146
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NET ASSETS

Unrestricted	\$ 841,490
Temporarily Restricted	880,991
Permanently Restricted	13,400

TOTAL NET ASSETS	\$ 1,735,881
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TOTAL LIABILITIES AND NET ASSETS	\$ 1,901,027
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O U R B E N

MUCH OF THE INSTITUTE'S WORK IS MADE POSSIBLE BY GENEROUS CONTRIBUTIONS TO OUR ANNUAL FUND. WE ARE GRATEFUL FOR SUCH SUPPORT AND GIVE SPECIAL THANKS TO THOSE WHO GAVE AT THE FOLLOWING LEVELS:

MAJOR FOUNDATION SUPPORT PROVIDED BY:

- Community Foundation of Greater Flint
- The Isabel Foundation
- Esther A. & Joseph Klingenstein Fund
- Richard Lounsbery Foundation
- The C. LeRoy Miller Charitable Foundation
- Minneapolis Foundation
- Oppenheimer Brothers Foundation
- The David & Lucile Packard Foundation
- Park Foundation, Inc.
- Ten Ten Foundation [⊖]
- Walker Family Foundation, Inc. [⊖]
- The Lawrence Welk Family Foundation

MAJOR CORPORATE SUPPORT PROVIDED BY:

- Accenture
- BD (Beckton, Dickinson and Company)
- Deloitte & Touche USA LLP
- Irwin Financial Corporation
- Northrop Grumman Corporation
- The J.M. Smucker Company [⊖]
- Weyerhaeuser

UK SUPPORT CAME FROM THE FOLLOWING FOUNDATIONS AND GOVERNMENT DEPARTMENTS:

- Comino Foundation
- Gordon Cook Foundation
- Department for Constitutional Affairs
- Welsh Assembly Government

Donations to the Institute for Global Ethics are tax deductible to the full extent of the law in the United States, United Kingdom, and Canada. The Institute for Global Ethics is a 501(c)(3) nonprofit organization in the United States, and maintains charitable status in the United States and Canada.

E F A C T O R S

5,000 AND ABOVE

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Mr. and Mrs. James K. Baker ☉
Mrs. William M. Correll ☉
Mawby Family Fund
Christopher J. McGoff
Charles S. & Erin K. M. Rainwater
Miss Patricia J. Samek
Mr. and Mrs. Timothy Smucker ☉
Mr. and Mrs. Alan R. Steckler ☉
Mr. Norman C. Weeks ☉
Marcia Worthing

1,000 TO 4,999

Anonymous * ☉
Mr. and Mrs. Giovanni Arduini ☉
Mary Louise Brown ☉
Mrs. Caroline M. Carl
Mr. and Mrs. Charles M. Cawley
Professor Jeanne Colette Collester
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Mr. Philip L. Smith and
Ms. Susanne Warrick-Smith

250 TO 499

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100 TO 249

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David and Isobel Anable ☉
Mr. Hector Andreos
Association of Professional Engineers
and Geoscientists of New Brunswick
Ms. Genelle Austin-Lett
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Margie & Dave Beckett ☉
Wendell and Lora-Lee Bell ☉

* Denotes more than one individual

☉ Denotes a member of the Heritage Society, recognizing ten or more years of membership

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Edith and Barry Bingham, Jr. ☉
Ms. Mary L. Blalock ☉
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We are extremely grateful to those around the world who have contributed toward the Institute's success. In addition to those listed here, many other members and contributors provided gifts at other levels during the year ending May 31, 2006. While space limits us from listing every individual, we deeply appreciate this important and kind support.

BOARD OF DIRECTORS



David Adams is a trustee of the Gordon Cook Foundation in Scotland, former principal of Northern College of Education, and former member of the General Teaching Council of Scotland, the Committee of Scottish Higher Education Principals, and the Open University Validation Board. (Brechin, UK)



David J. Anable is the recently-retired president of the International Center for Journalists, a Washington-based nonprofit organization working with professional journalists worldwide; former managing editor of *The Christian Science Monitor*; and former professor of journalism at Boston University. (Portland, ME)



David F. Hurwitt, a marketing and management expert who spent 26 years at General Foods Corporation, is president of Renaissance Executive Forums in Connecticut and serves on the boards of several nonprofit organizations. (Rowayton, CT)



Rushworth M. Kidder is an award-winning former columnist for *The Christian Science Monitor*; author of *Moral Courage*; *Shared Values for a Troubled World: Conversations with Men and Women of Conscience*, and *How Good People Make Tough Choices*; frequent writer and lecturer on ethics. (Lincolnton, ME)



Paul McAuliffe, formerly chief ethics officer at BD (Becton, Dickinson & Co.), is executive director of the Federal Reserve Employee Benefits System, where he oversees employee benefits and related compensation programs for 24,000 employees and 10,000 retirees of the Federal Reserve System. (Ho-Ho-Kus, NJ)



Yve Newbold is currently a member of the Policy Committee of FTSE4Good and chairs the Institute for Global Ethics UK Trust. She qualified as a solicitor in the UK, serving as international counsel (Xerox Corporation) in the US and European counsel (Walt Disney) and company secretary (Hanson plc) in the UK, where she has also held nonexecutive directorships of BT plc and Coutts & Co and been a governor of the London Business School, among many other appointments. (London, UK)



Graham Phaup is executive director at the Institute for Global Ethics. Having initially worked as a civil engineer, with expertise in tunneling, Graham then headed an office of public and international affairs in London, UK. He has been with the Institute since 1994. (Camden, ME)



Charles S. Rainwater is a government relations attorney and public interest and environmental advocate. His previous experience includes arts management and work as a field biologist and outdoors educator; his background is in conservation biology and mass communications. (Burlington, VT)



George W. Reid is COO of Porter Educational & Communications, Inc.; former president of Kentucky State University; historian (Ph.D. Howard University), speaker, writer, fund-raiser; former member of Harvard University's Institute for Educational Management. (Springdale, MD)



Philip L. Smith is the managing partner of Riven Rock Holding, in Penn Valley, California, with holdings in several companies. His previous experience includes work in the aerospace and electrical products industries, among others. (Penn Valley, CA)



Jennifer C. Smucker helped to found the Wayne Center for the Arts in Wooster, Ohio, and has served on the boards of the Orrville Area Boys and Girls Club, the Orrville Area YMCA, and the Wayne County Community Foundation. She is also a founding member of the Heartland Education Community, Inc., an initiative to improve schools by focusing on, among other things, the development of good character. (Orrville, OH)



Deborah S. Steckler is a former associate staff for the Appropriations Committee of the U.S. House of Representatives and currently serves on the board of the Long Ridge School in Connecticut as well as that of Creative Connections, a nonprofit international cultural exchange organization founded and headed by her husband, Alan. (Old Greenwich, CT)



Peter Stickler has held positions at Ford Motor Company and Visteon, and is currently vice president of human resources at Ballard Power Systems, a world leader in the production of zero-emission fuel cells, where he is responsible for leading the company's global human resources function. (Vancouver, BC)



Colburn S. Wilbur is a trustee and past president of the David and Lucile Packard Foundation. Previous experience includes CEO of the Sierra Club Foundation, international banking, and computer service. (Palo Alto, CA)



Randy Williams is managing director of Redmond, Williams & Associates, LLC, a firm that assists clients in the corporate, nonprofit, academic, and governmental sectors with developing processes for risk mitigation, ethics, asset protection and governance. She is also currently an Executive in Residence with Human Resource Institute. (Morristown, NJ)



Marcia L. Worthing is executive vice president of Mullin & Associates, an outplacement and executive coaching firm located in New York City, and was formerly the senior vice president of human resources and corporate affairs for Avon Products. (New York, NY)

INTERNATIONAL DIRECTORS and ADVISORS

DIRECTORS EMERITUS

Theodore J. Gordon is founder and chairman of The Futures Group, a large management consulting firm, and a senior research fellow of the Millennium Project for the American Council of the United Nations University. He is also former chief engineer for the Saturn program at McDonnell Douglas. (Old Lyme, CT)

Elizabeth Hart, former chair of the board of trustees of the Institute for Global Ethics U.K. Trust, represented U.S. organizations in the United Kingdom through advertising and public relations and coordinated student groups in European universities. (London, UK)

Anne E. D. Kidder is a former academic counselor with a long career of ministerial work, writing, child-raising, and volunteer leadership activities for community, church, arts, and environmental nonprofits. (Lincolnton, ME)

Robert W. Pratt, Jr., former executive vice president at Avon Products, Inc., and past president of the Association for Consumer Research, was recently on the faculty of Columbia University's Graduate School of Business and is currently at the Michael Allen Company. (Rye, NY)

ADVISORY COUNCIL

James K. Baker, retired vice chairman of Arvin Industries, Inc., and chairman (1991) of U.S. Chamber of Commerce, Washington, DC (Columbus, IN)

Rodrigo Botero, founder of the Foundation for Higher Education and Development in Bogota, former finance minister of Colombia, and former Ford Foundation trustee. (Cambridge, MA)

Harlan Cleveland, former dean of the Hubert H. Humphrey Institute of Public Affairs at the University of Minnesota, former assistant secretary of state, and author of *The Knowledge Executive: Leadership in an Information Society*. (Sterling, VA)

Richard A. Goldsby, Simpson Professor of Biology at Amherst College and author of several books on cells, immunology, and race. (Amherst, MA)

Willard M. Hanzlik, president of The Membership Foundation and former president of The Sterling Group, an investment banking firm in Houston. (Austin, TX)

Mónica Jiménez de Barros, executive director of PARTICIPA, professor of human rights at the Catholic University of Chile, and former member of the Pontifical Council on Justice and Peace. (Santiago, Chile)

The Hon. James A. Joseph, former U.S. ambassador to South Africa, former president and CEO of the Council on Foundations, former president of the Cummins Engine Foundation, and former under secretary of the Department of the Interior in the Carter administration, now at Duke University and the University of South Africa. (Durham, NC)

Martha Minow, Harvard Law School professor and author of *Making All the Difference: Inclusion, Exclusion and American Law*, chosen as an Outstanding Book by the Gustavus Myers Center for the Study of Human Rights in the United States. (Cambridge, MA)

George D. Moffett, president of Principia College, former diplomatic correspondent for *The Christian Science Monitor*, and author of the book *Critical Masses: The Global Population Challenge*. (Elsah, IL)

Gen. Olusegun Obasanjo is the president of Nigeria, who turned over his military government to civilian rule in 1979 and was democratically elected in 1999, and former chair of the advisory council of Transparency International. He is founder and publisher of *Africa Forum* magazine. (Abeokuta, Nigeria)

Randa M. Slim, manager of Middle East Programs for RESOLVE in Washington, DC; associate at the Charles F. Kettering Foundation; visiting adjunct professor at American University of Beirut, Lebanon; and former director of the National Conference on Peacemaking and Conflict Resolution. (Kettering, OH)

Timothy P. Smucker is the CEO of The J. M. Smucker Company. (Orrville, OH)

Theodore B. Taylor is a retired Princeton University physicist with long experience studying weapons systems, the ethics of weapons proliferation, and the principles governing international behavior. (Wellsville, NY)

The Rt. Hon. The Lord Weatherill, DL, former speaker of the House of Commons. (London, UK)

Katharine Whitehorn was a long-time columnist for the *Observer* and author of several books on children and medicine. (London, UK)

Daniel Yankelovich is founder and chairman of DYG, Inc.; chairman and cofounder (with Cyrus Vance) of The Public Agenda Foundation, and author of *Coming to Public Judgment: Making Democracy Work in a Complex World*. (La Jolla, CA)

IGE UK TRUST

IGE UK TRUST ANNUAL REPORT 2005–2006

CHIEF EXECUTIVE'S REPORT

LAST YEAR'S ANNUAL REPORT mentioned our new work with the BBC (British Broadcasting Corporation). The BBC's College of Journalism has been delivering its Dilemmas, Doubts and Decisions ethics training, based on IGE's Ethical Fitness® framework, to editors from radio, television and the BBC World Service, with good feedback. A training session in the north of England resulted in BBC Radio Manchester linking up with Rush Kidder in Detroit for commentary on a breaking ethics story, following a recommendation by one of the participants.

We marked 2005–2006's European Year of Citizenship through Education by organizing the sixth annual conference on Education for Citizenship in England, Ireland, Northern Ireland, Scotland and Wales, together with our education colleagues in Ireland. Participants, representing the four distinct education systems of the UK, traveled to Dublin where the conference was formally opened by the president of Ireland, Mary McAleese.

Our **impetus** youth awards program has continued to attract projects from schools, colleges, and youth organizations across the UK. **impetus** encourages children and young people to

undertake innovative projects about human rights and shared ethical values, to cooperate with others and to work with their communities, and to reflect on the impact of their endeavors.

During the year, our long-term project on Building a Responsible Society, jointly funded by the Comino and Gordon Cook Foundations, concluded a two-year program—looking at the potential of the civic mayor to build social cohesion in local communities—with publication of the report *The Role of the Civic Mayor in the 21st Century*.

We were delighted to be invited by the 250-year-old Royal Society for the Encouragement of Arts, Manufactures and Cultures (RSA) to be joint hosts of a series of lectures on personal responsibility. Yve Newbold, chair of IGE UK Trust, introduced the first of these lectures by leading UK moral philosopher, Baroness Mary Warnock, which was also filmed for Teachers TV.

None of these activities would be possible without the dedication of our staff, trustees, advisors, and funders, all of whose support we very much appreciate.

—Sheila Bloom

IGE UK TRUSTEE BOARD

Yve Newbold is currently a member of the Policy Committee of FTSE4Good. She qualified as a solicitor in the UK, serving as international counsel (Xerox Corporation) in the US; European counsel (Walt Disney) and company secretary (Hanson plc) in the UK, where she has also held nonexecutive directorships of BT plc and Coutts & Co. She was member of the 1994 Royal Commission on Criminal Justice, the Government Salaries Review Body (1994–1997); the Socially Responsible Investing Committee of Henderson Global and a governor of the London Business School. She was previously chair of the Ethical Trading Initiative. Yve Newbold was an IGE UK Trust Advisor from 1998, becoming IGE UK Chair of Trustees in January 2005. She is also a board director of IGE US. (London, UK)

Jonathan Bye is currently senior manager, Future Technologies Group, for the Royal Bank of Scotland in the City of London. As manager of Corporate Affairs, he was responsible for drafting NatWest's code of conduct, establishing employee hotlines and operational processes. He was also responsible for establishing the NatWest/Times newspaper *Business Ethics*' student essay competition. (Edgware, Middlesex, UK)



Sheila Bloom, (right) Yve Newbold

Listings as of January 2007

IGE UK TRUST

IGE UK TRUSTEE BOARD *continued*

Colette Dorward is an independent consultant in communication and cultural change. In 1989 she co-founded Smythe Dorward Lambert, which became the leading specialist consultancy in internal communications and employee engagement in the UK and beyond, operating across Europe and opening offices in the US. The company also funded the first academic chair in Organisational Communication at Birkbeck College, University of London. She left the company in 2001 after completing its sale to Omnicom Inc., and worked as senior partner for US leadership and change consultancy Mercer Delta, founding their London practice and developing their UK offer in strategic communication. In 2004 she set up Comma, initially working on an 11-month assignment with Marks & Spencer, acting as their interim Group Head of Internal Communications. (London, UK)

Robert Goodsell is the founding partner of the HRG Partners, an international network of consultants dedicated to improving organizational effectiveness. In his work he tries to combine the roles of business strategist, developer of leadership teams, leadership coach and communicator and marketer to help groups and individuals first understand and then influence the system in which they work. While much of his work is in acute situations—acquisitions, mergers and wide scale organizational change and development—embedding ethical practice as a foundation for creating the sustainable organization has been an element of much of his work. Educated in the UK, Robert has a first degree in engineering and economics and holds postgraduate qualifications in psychology and philosophy. (London, UK)

David Hurwitt is a marketing and management expert who spent 26 years at General Foods Corporation, president of Renaissance Executive Forums in Connecticut, and serves on the boards of several nonprofit organizations. (Rowayton, CT)

John Kingston worked in the venture capital industry for 15 years before joining Save the Children in 1990 as director of Fundraising/Marketing. He launched Venturesome in early 2002. Venturesome is part of the Charities Aid Foundation, a leading charity aiming to increase the flow of resources for charities and other nonprofit organizations. (Ashted, Surrey, UK)

Roger Singleton CBE is a government advisor; a consultant in charity governance and management; a nonexecutive company director; and a trustee of several charities. With a background in education, children's services, policy and management, he recently retired as chief executive of Barnardo's. While there, he expanded the organization significantly and led its change from an association providing residential homes to one principally supporting children and young people within their own families and communities. He has participated in many working parties, study groups and public enquiries. He is currently advisor to the Secretary of State for Education and Skills dealing with the statutory barring of people considered unsuitable to work with children. He is married with two adult daughters and grandchildren. (Braintree, Essex, UK)

IGE UK ADVISORY BOARD

Antoinette Glynn is a career consultant with extensive experience in international business. She specializes in managing career change and development, personal assessment and job search training, executive recruitment, management and organizational development, and strategy consulting. (Pontypool, Gwent, UK)

Dorothy Dalton was chief executive of ACEVO (Association of Chief Executives of Voluntary Organisations) from 1992 to 2000. She is founder and chair of the JoLT Trust, vice chair of

the Poverty Action Group and chair of the governance committees of a number of charities. She is also a trustee of Marie Curie Cancer Research previously a non-executive director of the Inland Revenue. She is a governor of International Students House and chairman of governors of Orley Farm School. Her current portfolio includes charities consultant for Bircham Dyson Bell, and she is editor of *Governance, Essential Information for Effective Trustees*. (Harrow on the Hill, Middlesex, UK)

IGE UK ADVISORY BOARD *continued*

David Kingsley OBE started the advertising agency KMP in 1964. His second career was as advisor and consultant to governments, both in the U.K. and overseas. On the release of Nelson Mandela, he was invited to assist in turning Inkatha into a democratic party. He is currently chair of Children's Radio and the Children's Discovery Centre East London. David has held a wide variety of voluntary appointments including chair of the Cartoon Art Trust, vice-chair of the Media Society and trusteeships of WorldAware and MediaWise. He is president of the Schumacher Society and has been a governor of the London School of Economics since 1965. (London, UK)

Bruce Lloyd is a futurist and author of many books and articles. He has a degree in chemical engineering and spent many years in industry and finance before entering the academic world. Until his recent retirement, Bruce Lloyd was professor of strategic management, South Bank University, London. (London, UK)

Elizabeth Mills OBE offers consultancy services in fundraising, public affairs and development planning. She has a particular interest in public, private and voluntary sector organizations committed to improving quality of health and care for older people, as her trading name "Eminence Grise" implies. Until 2001 she was chief executive of Research into Ageing, when she led it to merger with Help the Aged. She holds a number of voluntary appointments including trusteeships of Homeshare International, the Westminster Healthcare Foundation and Auditory Verbal UK. (Oxford, UK)

Andrew Phillips OBE qualified as a solicitor in 1964 and set up his own practice (Bates, Wells & Braithwaite) in the City of London in 1970, now specializing primarily in charity law. He is founder of the PARLEX Group, the first trans-Europe lawyers grouping, the Legal Action Group (LAG) and, in 1989, The Citizenship Foundation, of which he is president. He also initiated the Lawyers in the Community Scheme (1987) and the Solicitors Pro Bono Group (1996) of which he is president. A regular broadcaster, Andrew Phillips is also an occasional freelance journalist, writer and a trustee of the Scott Trust (owners of *The Guardian* and *Observer* newspapers). He was made a Life Peer in June 1998 and has been active in the House of Lords for the past eight years. (London, UK)

Peter Skala was managing partner and co-owner of Boyden International Ltd, the UK member of the Boyden World Organisation, from 1982–2003. He opened the Brussels office of Boyden in 1972 and subsequently moved to London to run the UK organization. His first management career was with large US multinationals, General Foods Corporation, Armour & Co. and United Fruit Company, in senior management positions both in Europe and the U.S. Peter Skala is a graduate of Yale University with a BA and MA in Political Science, and a member of the Yale University Graduate Development Council. (London, UK)

The Rt. Hon. The Lord Weatherill, DL was Speaker of the House of Commons from 1983 to 1992 and is currently Convenor of the Cross Bench Peers in the House of Lords. In 1989 he established an all-party Commission on Citizenship "to focus on the kind of society we should seek to leave to our heirs and successors." Bernard Weatherill is founder president of the Institute for Citizenship, deputy lieutenant of Kent, and plays an active role in many charities. (Ide Hill, Kent, UK)

Katharine Whitehorn was widely known as senior columnist and ethics spokesperson with *The Observer* for many years. She is also a writer of books and articles, a broadcaster and medical ethicist. She has served on various boards of companies—such as the Nationwide Building Society and the British Airports Authority—and on government committees, and was the first woman rector of St Andrew's University. (London, UK)

IGE CANADA

IGE (CANADA) ANNUAL REPORT 2005–2006

IN 2006 THE OPERATIONAL GROUNDWORK for the Institute for Global Ethics (Canada) was established. The Institute's Canada board, with executive director Stacey Huget, developed detailed business plans; resolved core business, governance, and intellectual property issues; assembled its necessary administrative infrastructure; and established the Vancouver-based offices and training facility. A small cadre of IGE Canada training consultants engaged in rigorous training with IGE founder and board member Rushworth M. Kidder, and were certified to begin delivering the Ethical Fitness® Seminar in January 2007.

Developing a base of interest for its training activity, IGE Canada hosted Rush Kidder for a series of breakfast events and workshops in February and October 2006. The British Columbia School Superintendents Association (BCSSA) continued throughout the year to work directly with the Institute to build on the success of its groundbreaking Ethics in Education Initiative.

The IGE Canada board of directors underwent several significant changes in 2006—not the least of which was adjusting to the sudden but peaceful passing in December 2005 of board member Mary Margaret Young. Instrumental in establishing IGE Canada, Mary Margaret's most generous bequest to the organization will help it achieve financial stability in its early years and an enduring legacy in years to come.

IGE (CANADA) BOARD OF DIRECTORS

Sheila Charneski is the outgoing president of the Better Business Bureau of Mainland BC, a position she held for six years following on her 11-year term as executive director of the Girl Guides of Canada BC Council. Sheila has extensive experience in all aspects of association management, including public awareness, community partnerships, and volunteer networks.

Susan Copland has worked in various capacities in the financial industry since 1994, including the TSX and the Investment Industry Association of Canada. Her primary focus and expertise relates to the development of, and consultation process relating to, the regulation of public financial markets. Susan is also on the board of Literacy BC and has assisted other nonprofit organizations.

Michella Frosch has more than twenty years of experience in international arts, design and culture, and education and entertainment. She is the CEO of Crescende International Inc., a worldwide art exhibitions company she founded in



Peter Stickler and Stacey Huget

2001. Michella is a long-serving member of the board of directors for both Arts Umbrella and the Arts Umbrella Foundation, chair of the board for the Vancouver International Sculpture Biennale, and serves as advisor to several other charitable arts and culture organizations.

The board bid a fond farewell to outgoing board member Rosalind John, whose invaluable contribution over the years will be missed. It also welcomed newcomers Sheila Charneski of the Better Business Bureau of Mainland British Columbia, and Susan Copland of the Investment Industry Association of Canada.

Looking ahead, IGE Canada plans to build sustainable demand for Ethical Fitness® and Moral Courage training, both in its primary Vancouver-based market as well as outside of British Columbia. It also envisions the launch of several exciting project-based initiatives that will not only dovetail well with its training activities, but enhance its funds-development plans as well.

—Stacey Huget

Chris Kelly has served as superintendent of schools and chief executive officer for the Vancouver School Board since August 2003. For the nine years prior to that, he was superintendent and CEO for the Richmond School Board. Chris holds or has held key board appointments with the United Way, Science World, the Canadian Cancer Society, the Canadian Education Association, and the University of British Columbia, among others.

Rushworth M. Kidder is an award-winning former columnist for *The Christian Science Monitor*; author of *Moral Courage*, *Shared Values for a Troubled World: Conversations with Men and Women of Conscience*, and *How Good People Make Tough Choices*; frequent writer and lecturer on ethics.

Peter Stickler has held positions at Ford Motor Company and Visteon, and is currently vice president of human resources at Ballard Power Systems, a world leader in the production of zero-emission fuel cells, where he is responsible for leading the company's global human resources function.

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IGE (CANADA)

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