

2021 RIA Leadership Awards Results

COMBINED (11 Judges)	
Awards Category	Market Education
Awards Description	<p>Recognizing RIA members who seek to bridge the gap between knowledge about and demand for RI by engaging and educating market participants, raising awareness of responsible investment and developing and promoting tools, resources and research related to RI.</p> <p>Market education activities could include: - Investor or advisor education tools/ resources, campaigns, market research, publications, media (marketing efforts but not just product related), and thought leadership with an external, market focus.</p>

Themes	Questions	WINNER	FINALIST	Range of Scores	
		BMO Global Asset Management MyESG Campaign: Aligning Beliefs and Investments	Desjardins The RI Certification Program: Empowering advisors to integrate RI into their practice and to educate their clients	Minimum	Maximum
Originality					
Ambition	Describe your ambitions for the project/initiative. What challenges did you expect, and what limitations did you have to overcome to be successful? Provide a measure of the scale of this project/initiative relative to your resources (team size, AUM, time required).	3.1	3.5	2.3	3.6
Innovation	Describe the innovative attributes of your project/initiative. How did your project/initiative take an innovative approach and/or deliver an innovative outcome?	3.7	3.1	1.9	3.8
Uniqueness	Describe the unique attributes of your project/initiative. Were you seeking to solve an issue or problem you perceived in the market that was not previously well-addressed?	3.7	4.0	2.0	4.0
Theme Score		3.52	3.55	2.06	3.67
Design & Delivery					
Design	Identify the objectives, goals or success criteria you established for the project/initiative. The objectives could be quantitative and/or qualitative in nature. Include timelines, scope, stakeholders involved, target audience where relevant. How did you track your progress?	4.0	4.3	2.4	4.3
Methodology	Describe the methodology or approach you took in developing the project/initiative.	3.7	3.5	2.4	3.7
Accessibility	Describe how accessible your education project/initiative was for the market. What marketing/communication channels did you use to reach your target audience? Was the project/initiative widely accessible or available on a limited scale?	3.5	3.7	2.6	3.8
Comprehensibility	Describe how you prepared the contents of the project/initiative to be understandable for your target audience.	4.1	3.5	2.6	4.1
Success	Describe the results or outcome of the project/initiative. Did you meet or exceed the success criteria you established for the project/initiative? What were your learnings from the project/initiative?	4.0	4.1	3.0	4.1
Theme Score		3.87	3.80	2.60	3.87
Influence					
Mainstream	Discuss how the project/initiative contributes to making RI a more dominant trend in the Canadian investment industry. Did the project/initiative reach an audience beyond the RI community?	3.9	3.7	2.5	3.9
Impact	Describe the impact of the project/initiative. To what extent does the project/initiative benefit the RI community at large, the Award entrant, and/or the Award entrant's clients (as applicable)? How was impact assessed?	3.2	3.5	2.7	3.8
Momentum	Discuss your project/initiative's momentum. To what extent did the project/initiative build on existing activities and/or provide a direction for future activities? How does the project/initiative support your long term commitment to responsible investment?	3.7	3.5	2.8	3.7
Theme Score		3.61	3.61	2.8	3.8
Final Score		10.99	10.95	7.57	10.99