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MAGAZINE FOR ENTREPRENEURS / ECONOMIC DEVELOPERS / EDUCATORS

Vol. 27 No. 5 May 2010 - \$4.95



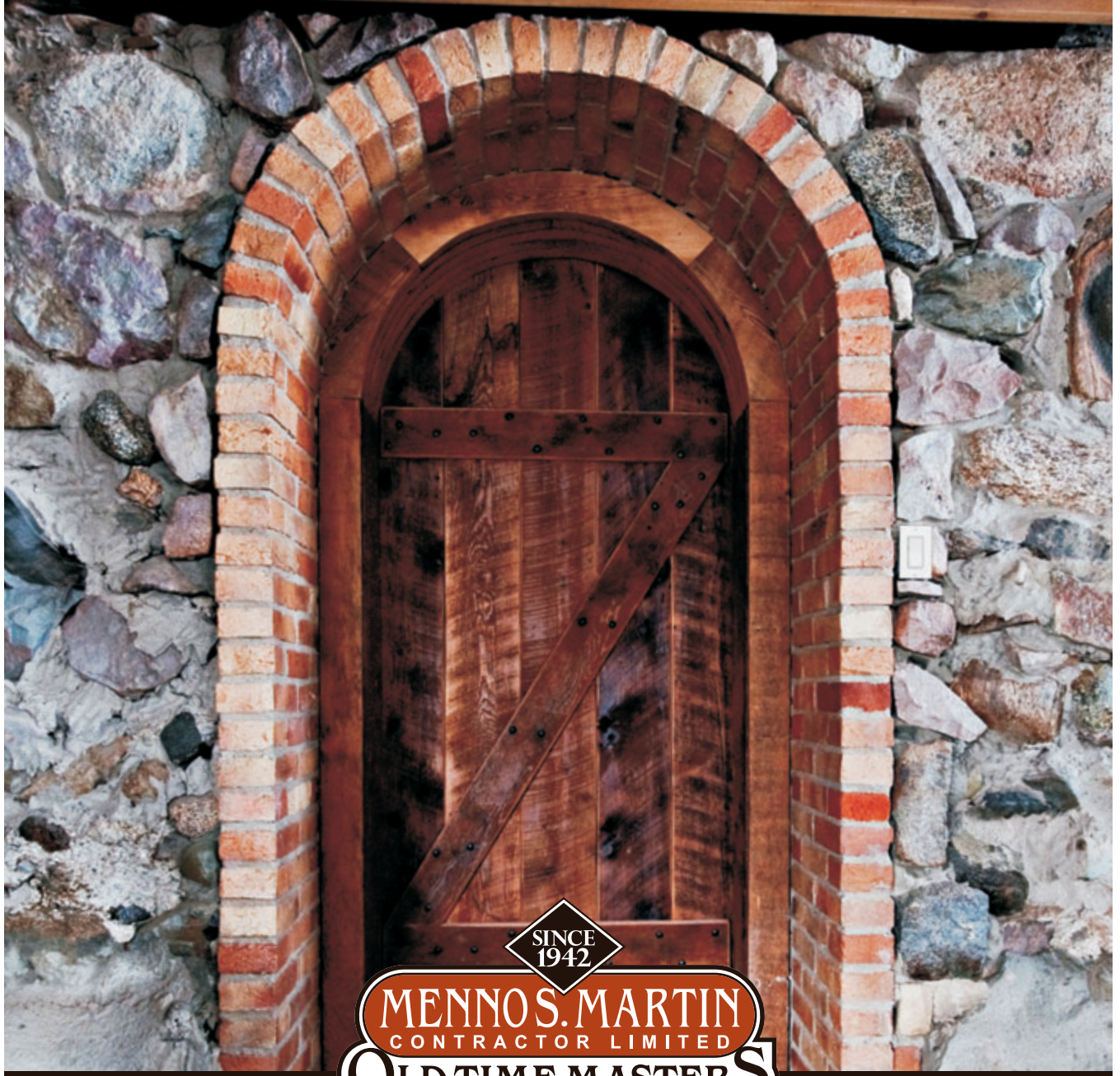
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On the cover: Christine Montag and Sherry Colbourne, Ladybug Technologies

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EXCHANGE magazine is a regional business publication published by Exchange Business Communication Inc., CEO Jon Rohr. Eight issues per year are distributed to each company in Kitchener, Waterloo, Cambridge, Guelph, and Fergus as determined by Canada Post Business Postal Walks. **Subscriptions are available for \$36.00. Send cheque or money order to Exchange, P.O. Box 41030, Waterloo, ON N2K 3K0. Attn: Circulation Department.** Back issues are available for \$8 per copy. Phone: (519) 886-9953. Fax: (519) 886-6409. ISSN 0824-457X Copyright, 2008. No part of this magazine may be reproduced without written permission from the publisher.



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MAY 2010

EXCHANGE

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WITHOUT A VISION....

Stories of visionaries with a healthy dose of reality

by PAUL KNOWLES



PAUL KNOWLES is editor of Exchange Magazine. He is an author and public speaker. email: paul.knowles@exchangemagazine.com

Vision is an odd quality – it's immensely important yet, on its own, virtually useless.

Most of us have participated in conversations like this: "I can't believe they're making all that money! I had that same idea, five years ago". Or, "I've got the concept for a

super new product. No clue how to make it happen, though." And we go back to watching Lost.

That's vision, without its necessary companions, like ambition, ability, determination, and the willingness to work.

Nobody creates anything new without vision. But no one turns creativity into reality and therefore success on vision alone.

This issue, we are featuring several people who had a vision... and more. The partners who have created Ladybug Teknologies, Sherry Colbourne and Christine Montag, began with a vision – Colbourne's quest to answer every parent's dilemma, "How do I teach my son how to be a social drinker without killing himself in the process?... There has got to be a better way than trial and error."

Then came the energy, the determination, and their powerful commitment to social entrepreneurship. Today, the vision is becoming reality. They are well on their way to achieving the twin goals of all social entrepreneurs – making a difference, and making a profit.

The "vision" word pops up again when the leaders of PrinterOn discuss their founder, the late Steve Spicer. They told us Spicer was a man "who had a vision well ahead of his time."

In our Making a Difference feature, Brian Hunsperger tells us of the vision that brought Social Innovation Generation to our community: "We wanted to become a hotbed for social innovation."

Having a vision is often easy. Making it real, not so much. That's why these stories are here, for you, in Exchange. Our small contribution to visionary reality. X

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SPRING... MORE THAN JUST BUDS

May issue of Exchange Magazine sees emerging businesses poking through the ground

by JON ROHR



JON ROHR is publisher of Exchange Magazine for Business, editor of exchangemagazine online and president of Exchange Business Communications Inc. email: jon.rohr@exchangemagazine.com

Start-ups can be thought of as the offspring of a community, the product of its infrastructure. They are specific to the community they originate from and in many respects, a measure of a community's supportive spirit.

These start-ups live up to the title – they are in the early stages of a long, arduous start-up cycle. This is one of a couple of periods in a business's development where capital needs are high and results are low. These emerg-

needed service or simply recognition for a job well done as you start on your own career?

Waterloo Region and its economic development catch basin (Canada's Technology Triangle), is a community that nurtures new companies and helps get them on a path to success as quickly as possible. It's economically diverse and culturally rich, with a set of values unlike most communities. It has supportive incubator organizations such as the universities, asso-

This issue, we decided to hang with a younger crowd, some younger in age, others involved in new start-ups.

ing entities tend to remain relatively unknown until they are written or spoken about.

I'm reminded of a 1950's advertisement that I'll loosely paraphrase: "I don't know who you are, I've never heard of your company, I don't know what you stand for and I don't know anything about your product ... now what was it that you wanted to sell me?"

That's what awaits the entrepreneur introducing a new product or service. And it remains a constant in the pursuit of business success that a big part of the battle for any company is telling its story, informing would-be investors and customers of the rationale behind the entrepreneur's reason for risking time and money. And why you should consider this service and/or product.

It still comes down to good communication. In this information age, one that continues to see dramatic increases of communication styles and choices, the job of telling that story and making sure you've hit the right target audience has never been tougher. So what makes it easier for a new company, given a good product, a

ciations and of course Exchange, which has been reporting emerging success stories for 27 years.

And for that 27 years we've followed a policy to cover new companies in our Monitor and Watercooler sections, but to offer full-length features on new businesses only once they've achieved a three year milestone and shown some growth.

This issue, and perhaps in the future (we'll see how the reaction goes), Paul and I decided to hang with a younger crowd. Some literally younger in age, some by their serial entrepreneur nature involved in a another new start-up, and others who are destined to be on their way to a full and rewarding career in their choice of field.

What's common is that each is at a new beginning, heading in a new direction, destined for success. Optimism runs high in these individuals, as does confidence, courage and a determination. Oddly enough, it's not indicative of age. I hope you like this Spring edition of Exchange. X

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An Inspired Group of Twenty-somethings Empower Change by "Knowledge Share"

Readers of *exchangemagazine.com*, the online version to *Exchange Magazine*, will be familiar with the social media share project known simply as TED.

Not to be confused with media icon, the late Ted Rogers of Rogers fame, TED originally stood for Technology, Entertainment, and Design industries, or as described on the TED website, "worlds". Given that TED attracts an amazing, talented and inspiring group of intelligent and purposeful individuals, it means enlightenment for those who seek to understand complex structures and ideological directions.

It follows that in Waterloo and area, ranked the Top Intelligent Community in 2007 by The Intelligent Community Forum, people have built a microcosm of innovative intelligence. It makes sense to get involved in this global sensation that shares knowledge freely. That's exactly what a group, led by a University of Waterloo graduating student, decided to do.

How did they find the time? They skipped class.

It started by filling a gap, describes Jaclyn Konzelmann, who was involved in a number of volunteer organizations at the time. She was running events and avoiding classes at University of Waterloo. Although Konzelmann outspoken about her absenteeism, she clearly describes her style of learning, which is different from traditional methods, but which has permitted her to not only excel in class but also have the time to fulfill her desire to serve the community. In September, Konzelmann will start at Microsoft.

In her search for projects, she came across TED. "TED talks were something I would watch on the side, and I really enjoyed learning about the different things."

Konzelmann says she doesn't learn very well in class "I don't attend class because I don't learn that way, but watching TED Talks is one way that I really do like learning." Hearing about TEDx from a friend, a self-described ambassador for TED, Konzelmann assumed that somebody in the Waterloo region would pick it up and initiate a TEDx Waterloo. So she waited. But Konzelmann doesn't like to wait – she prefers to get things moving. "After a couple of weeks, nothing was happening. So, I applied for the event license." That was August, 2009.

Konzelmann was able to put together the foundations of her team through a number of social media networking events that she and her cohorts frequent. One in particular was called "Start-up Drinks," and met in Toronto. Since most are engineers, they "started drinking... It was a really good night," says Konzelmann. "It's like an informal social night once a month. There's one in Waterloo."

"The one in Toronto is for more entrepreneurial types in the community," added Renjie Butalid, a member of the founding team. Konzelmann recalls, "My friend had mentioned that I should meet Renjie. He gave me a phone call earlier that day to let me know about it and then later that evening, at Start-Up Drinks, I met Ramy Nassar and Ramy had mentioned that he'd met Renjie at Ignite Toronto the night before. So, it ended up being a circle of people that I was introduced to within one day."

And "they all had a common interests," interjects Renjie. The synergies were in place, but there was still one hitch. They could host an event up to 100 people, but they wanted more. They wanted to attract 350, and to host that many people for TEDx, you have to have attended an "official" TED conference. None of the group had.

"Every time I met somebody, I'd asked if they knew anybody who had been to a TED conference," and eventually, Konzelmann got a lead. It was a really convoluted path, it led to Matt Gorbet, a technology researcher, who has worked at M.I.T. and Xerox-PARC and now runs Gorbet Design Inc. with his wife. Matt had attended TED Aspen in 2008, and qualified him to co-host "He's the reason we've opened the doors up to more people," says Konzelmann.

The leadership and collaboration that was needed to get TEDx of the ground was a social building project based that focused on trust, shared vision and project management.

Three to four hour planning sessions took place on Skype. When the interview was done a week before the actual event, the two co-hosts – Jaclyn Konzelmann and Matt Gorbet – had never met. It was only during the last hours of the pre-event build up that the two actually greeted each other in person.

"That's interesting too," says Butalid, who admits to being surprised by the initial lack of in-person contact. "You got three- or four-hour Skype conversations. We're going through everything [but] we haven't met in person. I think that's a pretty phenomenal thing, pulling that off."

When asked what was the secret sauce



TEDx Waterloo co-hosts Jaclyn Konzelmann and Matt Gorbet, above; organizers Ramy Nassar, top right, and Renjie Butalid.



to that phenomena Butalid replies "Well, there's a lot of trust and a lot of common direction. If trust exists, I think that makes for a good event"

Konzelmann says those meetings turn into a work session "It's a great way to update, but at the same time, it's a great way to actually make sure that we're all on the same page in doing the work that needs to be done. Any big decisions, that three-hour block on Monday evening is when we normally do it, going through the things that need to be done, making those decisions. We all leap into action to do things and throughout the week, emails get sent out. Usually, email is how we communicate with everything."

The first TED ran in 1984, as a conference to "bring together people from three worlds – since then the scope has become even broader." TED hosts two major conferences, as well as regular shows in Monterey, California, an annual in Long Beach and another in the UK, at Oxford. The content is always innovative.

So it was not surprising – although certainly exciting – that the TEDx Waterloo, held February 25 at the Gig Music Hall, was really amazing.

TED is owned by a private nonprofit foundation known as The Sapling Foundation. The Foundation was established in 1996; Chris Anderson TED's current curator, purchased it in 2001 from Richard Saul Wurman, the founder and creator of TED. In the deal, Anderson pledged to Wurman "to stand by the principles that made TED great: the same inspired format, the same breadth of content, the same commitment to seek out the most interesting people on earth and let them communicate what they are passionate about, untainted by corporate influence."

As TED held to those principles, it continued to improve. Specifically, content continued to broaden. TED sought out the "most interesting speakers, no matter what their field of expertise;" they also pursued opportunities on other continents and saw that TED could have an impact well beyond the conferences itself.

The TEDx Waterloo had a line up indicative of the TED agenda and reflective of the intelligence found in the Waterloo Area. Speakers included Terry O'Reilly, who shared some insights about human behaviour; and Phillip Beesley, who showed and told about how buildings can actually come alive. University of Waterloo's Ray LaFlamme spoke on the innate human drive to seek knowledge and understanding; Paul Saltzman shared his experience meeting and hanging with the Beatles; Caroline Disler explored how language and cultural exchange have evolved into a definition for Western World; Madhur Anand, Canada's research Chair in Global Ecological Change analysis, addressed what good about green; Michael Sacco, talked about the origins of chocolate and how we need to think differently about food and how it relates to us socially; Darren Wershler highlighted the importance of encouraging creative thinking; Marty Avery focused on connections and networks; and Amy Krouse shared some notes on life.

What makes TED so viral is best described by Butalid: "I think that's why TED talks are very successful online because – from my understanding – it's how they pick the TED talks. They really encourage speakers to get to their main point but to speak out of the place of action; to dream big but at the same time to simplify their idea and put it in such a way that people are able to relate to it. So, it becomes personal, and people hear about it or watch it, and all of a sudden people are able to relate to it, and then they're able to take that idea, and really go and spread the idea." – Jon Rohr



Speaker Ray LaFlamme

GREATER KW CHAMBER CELEBRATES BUSINESS EXCELLENCES

On Wednesday, March 3, over 750 people honoured the exceptional contributions of 72 individuals and organizations who were nominated for Business Excellence Awards at the Greater Kitchener-Waterloo Chamber of Commerce annual gala. Kyle Christie from CTV was master of ceremonies for the event, held at Bingemans. Ten recipients were honoured.



The Environment Award went to Stemmler Meats & Cheese. Shown, from left, are Terry, Kevin and Shawn Stemmler, with presenter Murray Costello, from Union Gas-A Spectra Energy Company. Stemmler Meats & Cheeses Inc. has demonstrated their commitment to sustainable environmental development through the use of new world technologies with regards to their refrigeration, recovery systems, HVAC system, environmental water treatment, a complete recycling program, as well as with food safety.



Non Profit/Charitable Award was won by Kitchener and Waterloo Community Foundation, represented by Rosemary Smith & David Yach (centre). Also shown are Chamber CEO Joan Fisk, left, and Neil Henderson, from Borden Ladner Gervais LLP. The Kitchener and Waterloo Community Foundation improves the quality of life in Kitchener, Waterloo and surrounding area, by building community endowment, addressing needs through grant making and providing leadership on key community issues. They help make a lasting difference in our community by providing local organizations with funds for new programs, capital needs, student awards and much more.



Business of the Year with Under 20 Employees is Anytime Fitness, represented by Brian & Lisa Bazely (centre). Also shown are Joan Fisk, Left, and presenter John Colangeli of Lutherwood. Anytime Fitness is the world's largest 24-hour, 365 days a year, co-ed fitness franchise. The Kitchener location has been a leader within the 1,300 club organization with respect to club design, marketing, community involvement and business strategies. Anytime Fitness is in the business of improving their member's lives through fitness and they have created a convenient, comfortable, affordable fitness centre with state-of-the-art facilities.



Young Entrepreneur of the Year is Kurt Wissent, of Premier Homecare Services. He received his award from Dr. Howard Armitage of the Centre for Business, Entrepreneurship and Technology. Wissent is managing director and owner of Premier Homecare Services. His personal support workers provide non-medical homecare - including companionship, homemaking and personal care - to those wishing to live independently in the comfort of their own home. Premier Homecare Services is an accredited homecare company which has made quality, professional service a priority. They serve Kitchener, Waterloo, Cambridge, Guelph and the surrounding areas.



The Innovation Award went to the University of Waterloo, School of Pharmacy, headed by Dr. Jake Thiessen, centre, with Joan Fisk and presenter David Yach of Research in Motion. UW is creating a knowledge powerhouse with the new Health Sciences Campus, anchored by the School of Pharmacy. It is positioned to become an innovative centre focused on medicine and health that will bring together education, diagnostics, treatment, research, and commercial applications in dramatic new ways.



The prestigious Michael R. Follett Community Leader Award was presented to Gerry Remers, accepted on his behalf by Ihor Stech, centre. Also shown are Joan Fisk and Cecil Hayes, from Spirited Investors Corporation. Gerry Remers is the CEO of Christie Digital Systems, recognized as one of the top 10 places to work in Canada. Gerry is a member of Leadership Waterloo Region Advisory Council, executive Campaign Chair of the United Way of KW, co-chair of Com-munitech, a member of the Arts Dean's Advisory Council at U of W, is a supporter of the Creative Enterprises Initiative of the Prosperity Council of Waterloo Region. Gerry has played a major role in the City of Kitchener's transformation through involvement in the reinvigoration project.



The WRIEN (Waterloo Region Immigrant Employment Network) Award went to Christie Digital, represented by Ihor Stech, centre. Also shown are Chamber President Joan Fisk, and presenter Martin Kihle of Libro Financial. Christie Digital recognizes the need for international credentials and education and knows the value of transferable experience. Christie Digital partners with WRIEN to educate employers and increase job opportunities to new Canadians in the KW area. They have several employees involved in WRIEN's Mentorship Program.



Business of the Year, Over 20 Employees is Gowling Lafleur Henderson LLP, represented by John Doherty, centre, shown with Joan Fisk and presenter Jeff Nesbitt of Agfa Health-Care. Gowling Lafleur Henderson LLP is one of Canada's largest law firms, with offices across the country, offering a diverse range of services to assist Canadian and international property. They provide dedicated industry expertise in the resource, infrastructure, life sciences, government, financial services, technology and manufacturing sectors.



Volunteer of the Year is Mandy Dennison, centre, of Research In Motion, shown with Joan Fisk, left, and Maureen Cowan of Cowan Insurance Group. Dennison is Vice Chair of the Chamber Young Professionals Committee, an excellent leader, and has demonstrated the need for a social media strategy which she has helped to implement.



Workplace Training Award went to Grand River Hospital, represented by Terry Olivier, centre, with Joan Fisk and Conestoga College President Dr. John Tibbits. Grand River Hospital identifies the training needed to promote skills, knowledge and safety in their organization. Within Organizational Development, they launched a Learning Management System, an online portal for in house courses. Workshops offered on weekends and week days help to further workplace training.

COMPANY NEW TO K-W SEES SHINING RESULTS



Milfred Hammerbacher, in Cambridge, Ontario in February, at the installation of the first 250 kW solar electric system in Ontario. Hammerbacher heads the Canadian Solar Inc.

Dr. Shawn Qu

Canadian Solar Inc. has installed Ontario's first 250 kW photovoltaic rooftop system, through its subsidiary Canadian Solutions Inc. The installation, the first of its kind in Ontario, was completed with Towcon Holdings and Aecon.

Canadian Solar Inc. is described as "a vertically integrated provider of solar cells, solar module custom-designed solar application products and turnkey solutions for the residential, commercial and solar farm markets."

The rooftop installation includes 1,326 Canadian solar panels on approximately 74,668 square feet with a total rated capacity of 305 kW direct current.

The system is owned by Dave Walden, President, Towcon Holdings, and is located off Hespeler Rd. between Langs Dr. and Bishop St. North, Cambridge.

"From completing the feasibility study to installing the first CS6P 230 panel, the installation team followed all required due diligence guidelines," said Walden. "I'm proud to be part of the first 250 kW PV rooftop system installation in Ontario with Canadian Solar Solutions. It will increase the amount of solar power produced within Ontario while providing tangible financial benefits to this community."

Canadian Solar is one of the world's largest solar module producers by manufacturing capacity, with operations in North America, Europe and Asia, and more than 6,000 employees around the world. Canadian Solar's panels are used in Germany, Spain, Czech Republic, Italy, the United States, Korea, Japan and Canada.

Last fall, the company moved its Canadian headquarters to Kitchener. Dr. Shawn Qu, Chairman and CEO of Canadian Solar Inc., has a previous connection to the region. He worked locally prior to founding Canadian Solar Inc. with his wife Hanbing in 2001, and before moving back to China with the business.

A company spokesperson says, "Canadian Solar's recent re-entry into Canada with Canadian Solar Solutions, Inc., and the shifting of its corporate headquarters to Kitchener, is a reflection of the opportunity the company sees here due to the surprising monetary return that now exists for Ontarians through the provincial government's Feed-in Tariff (FIT) program (the most aggressive large-scale FIT program in North America). Through this program, home owners with roof-top solar installations will be paid 80.2 cents per kilowatt-hour for the electricity generated by the system that is fed into the grid."

The Canadian operation is headed by Milfred Hammerbacher. With more than 23 years of photovoltaic (solar power) experience, Milfred has managed companies in four countries. He first worked with Dr. Qu right here in K-W.

"The new Green Energy Act is certainly making Ontario an exciting place to be a contractor. Projects like Canadian Solar Solution's 250 kW rooftop installation in Cambridge line up wonderfully with Aecon's culture and commitment to being 'green,'" said Rob Kinnaird, Director, Business Development, Aecon. "We are extremely pleased that Canadian Solar has chosen the Aecon group of companies as an installation partner on their projects. We trust this is the first of many new solar initiatives that we will develop together."

Canadian Solar's headquarters are located at 650 Riverbend Dr. The company says, "The new headquarters in Kitchener will be the hub of testimony, education and guidance on a wide range of turnkey solar solutions and opportunities."

Dr. Qu remarked, "The opening of this permanent headquarters is a milestone in our continuing relationship with the Canadian market. Our new headquarters is the symbolic foundation of our respect and determination to be a fully integrated and reliable solar turnkey solutions provider in Canada."

Canadian Solar's headquarters is located in Canada's first C-2000 office building, called Green on the Ground, which further reflects the company's dedication to energy efficiency and environmental responsibility.

In addition to its move to Kitchener, Canadian Solar has also announced plans to build a 200 megawatt manufacturing facility in Ontario. According to the company, "The new facility is expected to result in 500 new direct manufacturing jobs in Ontario and sufficient capacity to supply electricity to 60,000 homes per year. The estimated cost of the plant will be C\$24 million, and once completed, it will be one of the largest solar panel manufacturing facilities in North America."

The plant will be completed in stages, with the first phase of operations expected to commence in 2010.

XQuarterly – www.xquarterly.ca

- Ontario's economy is on its way to recovery with growth expected to increase by 3.3 % in 2010 and 4.1% in 2011, according to a new report by RBC Economics.
- On the other hand, Canada's strong rebound from recession won't be sustained as headwinds gather to slow growth, according to TD Bank. The quarterly report predicts the 5% growth rate recorded by the economy in Q4 2009 will slow to about 3.5% this year and below 3% next.
- TD says that level of growth will produce about 20,000 to 25,000 new jobs each month.
- TD adds that by 2013, once interest rates return to more normal levels, the average household debt service costs will rise to 9.3% of income from the current 6%.
- 9% of chief information officers interviewed for the Robert Half Technology IT Hiring Index indicated they plan to add full-time information technology employees during the second quarter, while 10% expect staff reductions.
- When asked to rate how confident they are in their companies' growth prospects in the second quarter, 71% of CIOs said they are very or somewhat confident. 50% of technology executives said they are optimistic their firms will invest in new IT projects in the next three months.
- 44% of tech executives said it is challenging to find skilled IT professionals. 38% said they are worried about losing top performers to other job opportunities in the next year.
- Multiple forces are at play that could push the Canadian dollar past parity with the U.S. greenback this summer, says CIBC World Markets Inc. CIBC's currency forecast sees the loonie reaching \$1.02 versus the U.S. greenback by September before dipping back to \$.97 by year end. This view reflects the expectation that the Bank of Canada will raise interest rates in the third quarter, a full six months ahead of the U.S.
- Kitchener/Cambridge area employers expect an upbeat hiring climate for the second quarter of 2010, according to the latest Manpower Employment Outlook Survey. 15% of employers planned to hire for the Apr.-June quarter, while 5% anticipated cutbacks.
- According to Statscan, foreign acquisitions of Canadian-controlled firms, particularly in manufacturing and oil and gas, drove a 10.6% increase in Canadian assets under foreign control in 2007. Canadian assets under Canadian control rose 9.9%, led by the depository credit intermediation industry. As a result of these movements, foreign-controlled firms accounted for 21.3% of corporate assets in 2007, up slightly from 21.1% the year before.



The Centre For Family Business featured business at a recent meeting was Reid Candy and Nut Shop of Cambridge. Shown are employees and members of the Drew-Smith family, business owners, including, front, from left, Carrie Drew-Smith, Business Development; Kathy Drew-Smith; Tom Drew-Smith; and Chocolatier, Ted Drew-Smith.

LESSENING THE IMPACT OF DISASTER

Perhaps the name says it all: "CatastroPhone." You may not grasp the details, but it's pretty clear that this company is offering telephone services in emergency situations.

According to Greg Dalton, President of the new company, CatastroPhone ERTS, is a brand new, and much more effective answer to the question, "What happens when your business premises suffers damage or destruction?"

Dalton suggests that the typical result has often been two-part. First, communication to the business is completely disrupted. A promo piece on the CatastroPhone website includes the clip: "We're sorry. The number dialed is not in service. Please check the number or try your call again. This is a recording."

Second, the business's insurer and telephone service supplier begin a process to restore communications that could take weeks. The clip continues: "You can't rely on your phone company or insurance company to provide emergency measures."

This is not good enough, says Dalton. So he is marketing a solution.

"Most of the damage is done immediately. A communication requirement is really key when the emergency happens. That's when people are trying to get information, whether it's your customers, suppliers, your employees or the media trying to find out what's happening, how fast are you going to be back on your feet, what do people do in the meantime. If you can't be reached, your resources are really limited on an outgoing call basis as to who you're going to get hold of."

The new CatastroPhone service employs state of the art technology to provide what will seem both to clients and to callers, to be a simple solution. CatastroPhone gathers details of the client's current telephone system configuration and maintains the information in their data vault. If a disaster strikes, the client company notifies CatastroPhone's emergency call response centre, and the service is activated.

At that point, a mirror image of the client's phone system – with the same phone numbers, company directory and extensions – is activated. When calls come to those phones, they are seamlessly redirected to employees' cell phones, home phones, temporary locations or voicemail boxes which can be accessed remotely.

Dalton argues that such a service has become even more crucial in today's environment of very high expectations of quick response. "People's expectations have been heightened. People want answers. They want them immediately. They're used to response to email and telephone calls with no delay, so if they call and get that message, that service has been disrupted or their call can't be completed, they'll call the next available supplier."

He also points out that companies may be legally bound to be accessible: "You could be violating a service level agreement that you have with your customers by not being able to respond to their calls. You could be in violation of contracts."

CatastroPhone customers are initially guided through a data gathering process. Says Dalton, "If you are a subscriber to CatastroPhone, you get a link to my site. You give me your telephone numbers. You give me your employee names and their extension numbers along with an alternate number where you would like the telephone to ring if it couldn't ring at their desk for any reason."

That information can be updated at any time. "The customer can go in any time and change this information if they have employees coming or going, if their extension numbers have changed, if the ultimate destination where they want that phone to ring changes because of a new cell phone or a new home phone number. They can go in and manipulate that information."

Dalton notes that his service is not expensive – annual basic membership costs under 25 cents a day.

As President of the new company, Dalton brings a lot of experience in responding to disasters. "I spent 25 years in the property and commercial insurance business and our firm took a very high level of involvement in the claims situation response. Most insurance brokers will simply call the insurance company and let them take control of the situation, appoint an adjuster and let the nature take its course in there. We normally met with our clients when something bad happens. We walked them through the process. We were there when the adjusters showed up. So I learned, firsthand, what the scenario was when a disaster struck a business premises."

And that scenario did not involve a same-day response. "Normally, an insurance adjuster would direct the business that was affected to find a temporary location, call their phone company and ask for some lines to be dropped into that temporary location, source some telephone hardware, and sit back and wait for a week or 10 days until the phone company showed up and dropped a line."

Dalton describes his company as "an intermediary," in that they involve Fibernetics as their "service provider, they provide the ultimate delivery of the service once the activation is required... I gather and manage the information that's needed by Fibernetics at the time of activation for the customers."

Very large companies probably have an equivalent service already in place, provided through a disaster recovery company that sets up satellite telephone serv-



Greg Dalton

ice, data storage and so on. But Dalton notes that the cost of such a service can run to "tens of thousands of dollars."

CatastroPhone focuses only on the telephone system but, he argues, it does provide telephone service that is just as immediate and effective, "for \$100 a year.... My basic service provides eight incoming lines for 30 days of emergency service and I've got an option for \$149 a year that provides 25 lines for 60 days, and both of those programs provide unlimited numbers of extensions to reach employees."

He says that these services are "adequate for most small, medium-sized enterprises particularly in emergency situations."

Dalton's initial plan was that insurance brokers would become agents for the CatastroPhone service. "The thing is, the price is so low, it doesn't generate enough revenue for the insurance brokers to attract a lot of attention. So the take-up hasn't been quite as rapid as I was hoping it would be. The Insurance Brokers Association of Ontario has recommended the service both to their members for their own offices and as a service to distribute to their clients as well."

"I'm looking at alternative means of distribution and communications of the availability of a service," he said.

Dalton, whose is also in business in property management, developed the CatastroPhone service in his home office, "with my nine-year-old at my side, watching me." He has begun to develop a network of distributors (they can be found on line at www.catastrophone.ca).

He found a gap in traditional service, and has filled that niche with a unique product. He makes his pitch: "Really, every business should have it. There's no reason a business can't have it, from the price, and they've got a huge, huge gap in their telecommunication recovery."

XQuote

"Ontario's economy appears to be finally emerging from last year's tough recession with the pace of recovery accelerating in the past few months. Increased activity in the housing sector and greater motor vehicle production were among the factors that led to the return to positive economic growth over the second half of last year... Challenges are still on the horizon this year with the strong Canadian dollar limiting U.S. demand for Ontario's exports, the automotive sector susceptible to more turbulence and the provincial job market taking time to recover. Nonetheless, economic prospects should improve throughout this year and next as more industries and sectors move into recovery mode."

– Craig Wright, senior vice-president and chief economist, RBC

SMART PHONES AND SMART DRINKERS

BY JON ROHR AND PAUL KNOWLES

Ladybug founders want to make the world a safer place through technology

Sherry Colbourne is a social entrepreneur and was a single mom. When it comes to innovation that makes a difference, that's a potent combination.

Colbourne is co-founder, with Christine Montag, of Ladybug Teknologies, a company with a unique product, a unique approach... and starting to make a unique social impact. CEO Colbourne admits that it all started with a mom's concern about the potentially dangerous combination of teenage children and parties.

"I was a single mom. I had a 17-year-old boy and a 13-year-old daughter. We lived in the country and bush parties were looming, and as a single mom, I thought, 'How do I teach my son how to be a social drinker without killing himself in the process?' Born and raised in Toronto, I had seen lots of rowdy parties growing up and thought, there has got to be a better way than trial and error."

Her initial response was obvious – she decided to buy a breathalyzer. "I thought, 'There's going to be a technology out there that probably will solve this problem really quickly.' It will just analyze the blood alcohol and off we go. So, I connected up with a cop of friend of mine who told me about Draeger (a German firm that manufactures breathalyzers). I called Draeger and said, 'I would like to buy a breathalyzer,' and was promptly turned down. They will not sell breathalyzers to the consumer."



Ladybug's BAQ Tracker is an app for smart phones, including the popular BlackBerry.



Colbourne and Montag are both entrepreneurs at heart; more than that, they are both social entrepreneurs, interested in the dual objectives of making money and making a difference.



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That answer was unacceptable to Colbourne. "That just seems like we were setting up the public to fail. But fortunate-

Her conclusion was, it would be a good thing – as long as the equipment was reliable and the person using it was well

"What's your decision? Now, it's in front of you and you have the power to make that decision for yourself. It's not your mother. It's a machine."

ly for me, the guy that I spoke with at Draeger was a really cool sales manager and he ... directed me to Indiana University. There's a program down there called the Borkenstein course, very well-regarded. All the cops, all the forensic guys go to it."

Colbourne is persistent. "I went off to it, spent a week rubbing shoulders with all the science guys, the legal guys, the cops, the forensic guys and started to kind of understand their world. And the reason they don't want breathalyzers in the hands of the consumer is that there's this fear that if the consumer knows what their blood alcohol level is, they will drink to the limit. However, me being in tech, I said, 'Let's look at this from an analytical perspective. Would that be a bad thing?'"

educated in the issues of the effects of alcohol consumption.

She obtained a breathalyzer,

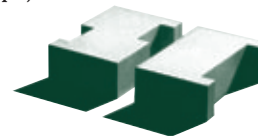
Her friend, Christine Montag, COO of Ladybug Teknologies, followed suit: "When she bought a breathalyzer, I bought one."

It might have stopped right there. Both women had spent more a decade in business – Colbourne in the high tech sector (both large companies including Com Dev and Dspfactory and a small start-up), Montag in finance and administration (specializing in financing start-up businesses and turn-around opportunities). But that wasn't enough for them – Colbourne and Montag are both entrepreneurs at heart; more than that, they are both social entrepreneurs, interested in



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the dual objectives of making money and making a difference.

Montag told Exchange, "It's always been my dream to have a business of my own." She adds, "Sherry was the one who started with the idea." Colbourne had extrapolated her own experience, reasoning that if she was concerned with finding a method of determining safe levels of alcohol consumption, others might be, too. So Colbourne and Montag decided to start changing the world.

They began proclaiming their message of how to be safe.

Colbourne notes that the legal level of impairment 0.08 "is a little bit high. You're actually pretty hammered at 0.08." She also points out that "We know from research, that 50% of the population underestimates their blood alcohol level."

Colbourne says, "Ladybug was founded in very late 2004. We started at that time with our events service, which is really a corporate-focused service for corporate clients who put on galas and want to ensure that their employees are well aware of what their blood alcohol levels are before they leave the event."

That was the starting point. She adds,

"We found that there was a demand for the actual breathalyzer, so we secured a North America wide distribution agreement with Draeger, who are the breathalyzers that we were using for our event service."

Product quality is key, by the way. Montag is blunt: some devices sold "on line are crap."

Building a relationship with Draeger wasn't an instant reality. The Ladybug team went to Germany and met with the company. They learned that Draeger did not impact on the consumer market, and they convinced the company to allow Ladybug to be their distributor.

Says Colbourne, "I'm persistent. Eventually, when I called them back and said, 'I still want that breathalyzer,' they said 'okay, we'll sell it to you. You can become a distributor for us.' And so that started our relationship. It has been a very long and very rewarding relationship."

Colbourne and Montag say that breathalyzer products are excellent; however they admit that prices can be a barrier; initially \$650 at minimum. Says Colbourne: "We started to work with Draeger to come out with a device that was a little bit more consumer friendly and we now have one. Unfortunately, those units are enforcement quality breathalyzers so even with the time and attention that we got from Draeger to come up with a better, less expensive unit, the cheapest unit is still \$500."



Sherry Colbourne: "the one with the idea".

There is a market at that level. Colbourne says, "We have customers who buy these and have bought them since we've been in business. They are 35-plus, generally guys, salesmen, CEOs, entrepreneurs, guys who just can't afford to make a mistake. So they'll buy these, no problem, and for them, price is not the issue. For them, the issue is, 'I can't afford to make a mistake'."

But that didn't specifically meet the

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original purpose of Ladybug – how to get the right information into the hands of all consumers, especially young people like Colbourne's kids. The options were limited – \$500 for an effective device; \$20 or \$50 for devices that didn't actually do the job. This left what the CEO calls "a huge gap."

Enter the generation of apps.

Colbourne tells the story: "We got one of Canada's most renowned researchers and a forensic toxicologists on our advisory board because I wanted to make sure that, because we are doing some-

I thought, 'How do I teach
my son how to be a social
drinker without killing himself
in the process?'

thing different, that people wouldn't dismiss us. These guys have been instrumental in making us who we are today. Jim Wigmore is our forensics guy. I said to him, 'We've got to come up with a better way of doing this.'

"And, so, when smart phone technology came out, we started to banter around the idea of the forensics [in determining the impact of blood alcohol levels]. It's just an algorithm. Really, it's just math in the end, and if you can put it in an equation, then you can put it in here [a smart phone]."

Ladybug invested in the R&D necessary to develop an app that would do the job, and they were successful. Says Colbourne, "In October, we came out with our new software application. It's not as accurate, of course, as a breathalyzer, but it's the same science that's used in the court system. If you've got a DUI and you had to go before the court, the Crown would bring in a forensic toxicologist to validate the reading that came off of the evidentiary police unit at the police station. They'll do some investigation and they'll say, 'well, we went to the bar and we saw that there was a receipt for X number of beers' or whatever and then they'll ask the forensic guy to do a retrograde calculation of what your Blood Alcohol Concentration would be."

Wigmore is one of those "forensic guys", and "He worked with us to develop the app and so it's as accurate as the science will allow you to get."

And talk about bridging the price gap – this app, downloadable from the website



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The Ladybug partners are serious about being social entrepreneurs. Montag says one of their goals is “to help keep the community safe... to give people technology to make better decisions.”

And their social commitment is instantly evident when Montag reveals that, although the company is still about two years away from profitability, by their projections, they have already created the Ladybug Community Fund, administered through the Kitchener-Waterloo Community Foundation. One third – \$3 – from every BAQ Tracker app is donated to that charitable fund.



PHOTOGRAPHY: EXCHANGE MAGAZINE

Christine Montag: “a dream to have a business of my own.”

That doesn’t mean they are moving away from the breathalyzer business. Montag notes that there is much work being done to produce a reliable breathalyzer that could retail for \$300. “That should help,” she says.

Education remains one of the biggest challenges facing the business. Montag notes that it is ironic – everyone applauds their products, but most people don’t feel they need them. Most people, argue the Ladybug partners, are therefore wrong.

“A small woman,” says Montag, “who has two drinks with her husband is really up against the .05” (the BAC reading that doesn’t lead to an impaired charge, but which results in a three-day license suspension).

Colbourne loves to do a bit of educating. She notes that the legal level of impairment – .08 – “is a little bit high.

You’re actually pretty hammered at 0.08.” She also points out that “We know from research, that 50% of the population

Montag says one of their goals is “to help keep the community safe... to give people technology to make better decisions.”

underestimates their blood alcohol level.”

She supports the Ontario law that permits suspension at 0.05. “It’s not a criminal limit. It’s kind of an administrative limit – they take your license for three days now. But it’s very supportable. I think it’s a good limit, myself.”

And having worked with the technology for years, Colbourne also knows her own limit. “I would never get behind the wheel of a car beyond 0.03.”

Discovering your own limit – not having it imposed by someone else, including parents – is an important part of the marketing appeal of Ladybug’s products. Colbourne says, “Ultimately what technology does for people, is it kind of makes it objective. Eventually, after all the passion gets out of it, it gets right out there in the middle of the table and people start to solve the problem and it doesn’t become as personal and I really liked it.”

She brings it right back to her initial concern – young people: “Alcohol consumption and all the stuff that goes on around it, it’s very emotive. There’s lots of people standing up on their soapbox going, ‘don’t do this’ and ‘don’t do that...’ And I remember as a kid growing up, who likes to be told what you can and can’t do? You’re a young adult. You think you know everything even though you don’t but you’re in that mode. And my feeling was, if I could give my kids something that took it away from mom and into their own management, that just said, you know what, if you have a drink, blow into this. This will tell you what you are. Now, you decide, what are you going to do with that? Are you going to cab it home, are you going to stay where you are? What’s your decision? Now, it’s in front of you and you have the power to make that decision for yourself. It’s not your mother. It’s a machine.”

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PrinterOn's Angus Cunningham,
left, and Ken Noreikis

"We think that we figured out what the market needs and what the market wants, what the market is willing to put a value on and pay for it and then take the business and grow it from that."



MOBILE PRINTERS TO THE WORLD

BY EXCHANGE MAGAZINE

PrinterOn has a vision as big as the globe... and the technology and energy to make it a reality

A guy walks into an airport lounge and announces, “Your laptops are so yesterday.”

That’s not actually the opening line to a joke – it’s a paraphrase of the philosophy behind one of Kitchener-Waterloo’s growing tech firms – PrinterOn.

As Ken Noreikis, VP of Sales and Marketing says, “fundamental shifts [are] occurring in the market. If we go back three or four or five years, the definition of a mobile user was somebody who had a laptop that would connect to a wireless hot spot... The shift that’s occurring in the market is there are more and more mobile people, mobile executives who don’t travel with their laptop any longer. They’ll just travel with their Blackberry, with their iPhone, with their mobile device.”

And that’s good news for PrinterOn, whose mobile printing services, simply stated, “let users print documents to any networked printer, anywhere in the world.”

Noreikis argues that while you can do a lot on a mobile device, “I mean essentially, you really can’t read an attachment or document on a mobile device. So we believe we’re positioned well in the market to benefit from the transition to mobile devices... once people learn that there’s an option and an alternative where they can actually print and get their output.”

“This is what we see happening, in the airport lounges and the hotels – the business people, they don’t want to travel with their laptop... And once they go through the transition where they learn they can print from their Blackberry, our usage continues to go up from mobile devices.”

PrinterOn has reached its first decade in business – it was founded by Steve Spicer, in 2000. Noreikis describes Spicer as “a founder who had a vision well ahead of his time.”

The initial market for PrinterOn software, according to Noreikis, “historically... was what we defined as hospitality/hotels.” But CEO Angus Cunningham says that a growing relationship with Ricoh has expanded that geometrically.

FEATURE STORY

Says Cunningham "Almost two years ago, we ended up getting into a relationship with Ricoh in the US, and that agreement was basically to embed our soft-

"Mobile executives don't travel with their laptop any longer. They'll just travel with their Blackberry, with their iPhone, with their mobile device."

ware that enables our service into their printers. And the significance of that was, this provided a very simple implementation for internet access for printers and for mobile 'road warriors' to be able to access print. It was the only one in the worldwide marketplace that was an embedded solution where you just plug the printer into the internet, no other setup required. It was very simple, really sleek."

He adds, "On the anniversary of the contract, we got into further discussions with them and as they were rolling out, they saw the importance of this and the

value that it gave them and the competitive advantage it gave them in the market. We then started working on a worldwide agreement for them to take this across all their operations – Europe and Africa and the rest of the world."

Cunningham says there were minimal growing pains: "It worked out well because we're located here and in the US through Ken's location in Chicago. It was easy to work with them and that was sort of the natural fit to start things off."

Noreikis points to some of the "name" locations that resulted from this relationship: "For instance, we rolled out the American Airlines Admirals Club jointly with Ricoh. We rolled out the Delta Sky lounges together with Ricoh. We've rolled out with them on number of hotel locations. We've rolled with them in a number of corporate accounts and law firms as well."



It all comes together: from left, Ricoh Canada's Eugene Renzetti, Williams Coffee Pubs' Dean Braund; Canada's Science and Tech Minister Gary Goodyear, and Cunningham.

Becoming "ubiquitous"

But the PrinterOn team are not people ready to rest on their laurels. The next question, says Noreikis, is "How do we take our horizontal technology, which we believe ought to become ubiquitous in the market? How do we take it and penetrate the market in a vertical way? And that's really what we're working on with Ricoh – how to penetrate new vertical markets with our joined solution."

For instance, he adds, "It's 'get American airlines' and once we have American airlines, how do we cookie-cut that across all the other airport lounges across the globe?"

Cunningham and Noreikis are aware of the incredible impetus the Ricoh relationship brings to PrinterOn. The CEO points out that Printer On is "a company of roughly 25 people... Ricoh is a \$20 billion corporation that has – what's the Ricoh sales force in the US?"

Noreikis knows: "3,500 sales people."

That's significant leverage, what Cunningham calls "feet on the street... We built technology. We validated technology. We validated the market. Now, it's time to really get this thing rolling on a high volume, and a relationship like we have with Ricoh really helps us with that because we're utilizing their sales force."

So if PrinterOn is making significant inroads in hotels, then in airport and corporate lounges, what's the logical next step? Noreikis and Cunningham know – coffee shops, everyone's office away from home. Their first market in that niche? Williams.

Noreikis underlines the need for an initially successful deployment: "That's why a Williams Coffee was so important,

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FEATURE STORY

right? How we win and deploy a Williams Coffee, be successful and gain the experience and the credibility and the market share and the reference and the case study and then 'Boom!' – cookie cut that across the other coffee shop chains."

The market is still fairly young; we are the major player in the market but there's a lot of market potential ahead of us.

"Easy experience"

Wherever the user is located – lounge, coffee shop, office – the key is to make the process easy and consistent. Says Cunningham, "The experience is really easy. It takes your office productivity with you on the road, allows you to utilize it without any hassles of trying to either hand your document to someone else to print it for you because they're on the network, or hooking up to their network and being compatible with that printer... Now because everything is mobile, it's really increasing your ability to be mobile and still have all the tools you need to be working and being efficient."

He adds, "It doesn't have to be a Blackberry. It could be an iPhone. It can be any phone, any internet enabled device is going to be a target."

Corporate Secretary Holly Snider underlines the simplicity: You can e-mail from here, the desktop." Cunningham jumps in: "I can e-mail from my device and print off in a printer in Japan right now. I could fly into Japan, enter my release code note, would pop my job."



PHOTOGRAPHY: EXCHANGE MAGAZINE

The Noreikis method: "Boom! Cookie cut that across other... applications!"



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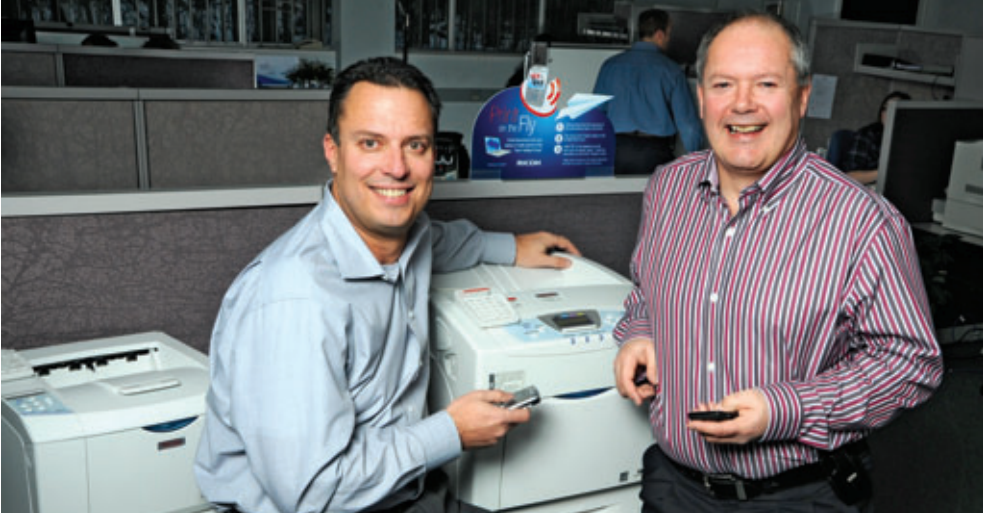
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PHOTOGRAPHY: EXCHANGE MAGAZINE

PrinterOn's Noreikis and Cunningham believe they are riding a wave toward unlimited opportunity... and they're enjoying the ride.

And Noreikis adds: "We don't require any software to be downloaded to the client device to use our solution, which was really important for the venues that we're going into because they don't want their internal IT folks to have to support client site software to use the service."

Noreikis points to the speed-of-light changes that have led to where PrinterOn is today: "If we go back three or four or five years, the definition of a mobile user was somebody who had a laptop that would connect to a wireless hot spot.... The shift that's occurring in the market is there are more and more mobile people, mobile executives who don't travel with their laptop any longer. They'll just travel with their Blackberry, with their iPhone, with their mobile device and now that the challenge is, ...essentially, you really can't read it on attachment or document on a mobile device. So we believe we're positioned well in the market to benefit from the transition to mobile devices."

Cunningham notes that while PrinterOn is the "market leader" in this segment, the company's horizons are unlimited: "I think as far as grabbing the potential market, we're on the tip of the iceberg at this point. The market is still fairly young; we are the major player in the market but there's a lot of market potential ahead of us."

Customizing the brand

The key to the PrinterOn experience is that it is essentially the same, wherever the consumer finds it. But the company does customize "a specific look" for the corporate web portals consumers use to access the service – America Airlines, Delta Airlines, Williams Coffee Pubs, and so on.

These clients also have the option to offer the service as an amenity, or on a fee for service basis. Noreikis notes, "in the case of Williams Coffee, we're start-

ing as an amenity and ultimately, they're going to charge for print and it will be simple and easy to add charge for print."

Ahead of its time

In reality, PrinterOn was well ahead of its time in the every-changing mobile environment. Cunningham remembers, "When we started developing in 2000, we went through our R&D effort but looking at – there was no market at that point. We were trying to define it. We saw that there was a need for this... but the market basically wasn't in an acceptance mode. No one was really saw that there was a market there."

But they persevered. Cunningham says, "In 2003 [came] our first big commercial relationship, with Hilton, and that's when we found what we thought was the right market approach and business model on this. And so, from 2003 forward, we're really starting to get into market sort of market expansion and more on the marketing side as opposed to the development side.... since 2005, we think that we figured out what the market needs and what the market wants, what the market is willing to put a value on and pay for it and then take the business and grow it from that."

The initial investment in the company, in 2000, was "about \$27.5 million," according to Cunningham. "We went out and financed ourselves, around 2000." The company has remained private.

Loss of a leader

Founder Steve Spicer died from a heart attack away two years ago. Cunningham says that the loss meant, "That brought some different issues for us. We had to deal with sort of succession planning there. We had to deal with one of our major technical and visionary people resources not being here anymore."

The solution, says the CEO, was

"We've taken the Spicer side of our business and we've sold that off to Open Text and that gave us the ability to allow some of the shareholders to sort of liquidate their holdings... we have pared down our shareholder group; we didn't bring on any new ones, just allowed ones who wanted to get out, to buy them out and the ones who wanted to stay, we gave them the ability to stay."

With Spicer's death, the long-term team members lost a large piece of personal history. PrinterOn was founded in 2000, but its antecedents go back through two decades. Noreikis remembers, "My history with Steve, it goes back to '85; I helped him launch the original business, which actually started as a printing business."

The current leaders credit Spicer with the vision to see the trend from on-site printing to the technology they are leaders in, today.

"The experience is really easy. It takes your office productivity with you on the road, allows you to utilize it without any hassles of trying to hand your document to someone else to print it for you."

PrinterOn's relationship with Ricoh is a huge marketing advantage, but it comes with one proviso: having the implementation embedded in the printer is an exclusive arrangement.

Therefore, says Noreikis, there is also "a non-embedded solution" called Print Diagnostic, an application that can be wired into any printer; says Cunningham "everything is all loaded. It's all inside there. You just plug the internet cable into the back of the printer."

They admit that this could lead to the two solutions competing with each other – clearly a win-win for PrinterOn.

Noreikis sums up their vision: "We're 100% committed to the mobile printing marketplace. That's our core. That's what we're focused on. We're going to continue to expand through the vertical markets that have a need, and the other area we've really gotten focused on over the last 12 months is the opportunity internationally. We're actually launching in a number of ways throughout Europe at this time." X

THE PERFECT PLACE FOR GOLF

BY PAUL KNOWLES

Let's not exaggerate – central southwestern Ontario is a golfer's paradise. If that sounds like hyperbole, consider the evidence. The best way to do that, naturally, is to examine the options, course by course, fairway by fairway. All who do reach the same conclusion.

The golfing opportunities in the area served by Exchange magazine are simply superb. This landlocked district may not have expansive beaches or a Great Lake to call its own, but it boasts the perfect topography for the finest in golf, at every level.

This is pure, southern Ontario golf, too – not a southern US expanse of perma-grass, sand traps and a few palm trees. Here in Ontario, golfers face the true challenges offered by rivers and

ponds, undulating landscape, and ubiquitous woodlots. As well as grass, and sand traps. This is golf the way the Scottish inventors meant it to be – challenging, diverse, and entirely enjoyable. Except for lost balls, but that, too, is part of the challenge of golf.

The selection and variety of courses in this area is indeed impressive. There are nine-hole courses ideal for a shorter outing; shorter courses geared for newer golfers or anyone looking for a faster game; and every level of full, 18-hole courses, right up to courses deemed among the finest in the land.

Course designers throughout the area have taken advantage of the perfect local terrain. You'll find beautiful fairways stretching along rivers and streams; greens that are backed by ponds and copses; the rich variety of trees native to southern Ontario.

And wildlife. Don't be distracted by the surprising animal sightings you may experience on these courses. This writer, in the past season or two, has shared a fairway with deer, foxes, herons and all manner of birds, raccoons and the occasional skunk. The latter presents unusual challenges when it comes to playing the ball where it lies; some discretion may be called for.

There are courses in the world where the focus has to be only on golf, because there is not that much to see other than fairways and greens. That is just not the case when it comes to the beautiful, wild and wonderful golf courses of our area. Here, you simply have to take the occasional moment to savour the natural wonders that surround you – and then you get back to the business of making par with a perfect seven iron shot over the pond and onto the green.

Exchange presents this special section to help you find the right courses to meet your golfing needs. But we encourage you to be bold – think Phil Mickelson, with his ball buried behind some trees – and try something new, as well. Enjoyment and delight are guaranteed, even if your score is not.

This area offers the right experience for every skill level. Brand new golfers will find courses suited to learning the great game, and plenty of opportunities for instruction. Occasional players need not be embarrassed by their lack of expertise, either – there are courses and tee block distances suited to ensure that your experience leaves you smiling, not in need of emotional counselling.

And more seasoned golfers will discover plenty of opportunity to test their skills against courses designed to demand the best from them. Whatever the difficulty level on offer, the end result is the same – the sheer enjoyment of golf, followed by the just rewards of a beverage and the opportunity to amend your score as necessary during the post-game review. ✕

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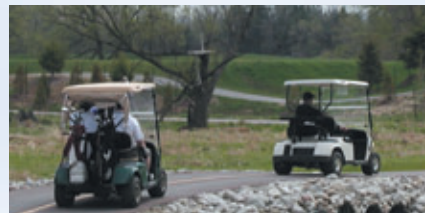
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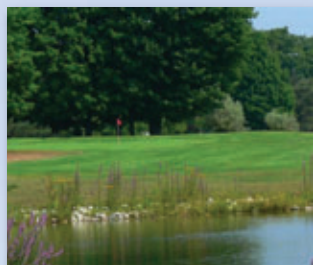
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BE CAREFUL WHAT YOU MEASURE

Management needs to know what to measure, and how

by DOUG CATER



DOUG CATER is a founding partner of Process Impact Inc., a manufacturing consulting company. email: dcater@pii.on.ca.

“What gets measured gets improved” is much more than a cliché. We are conditioned at a very early age to measure our performance in everything. In sports we count goals and assists, we track lap times and pace, we count baskets and rebounds, we count wins, home runs and RBIs. Sport is by far the best example of the measurement system driving excellence through the improvement process.

Look at the improvements being made in the education system since the introduction of standardized testing, and the subsequent publication of individual school performance in local newspapers.

loses when substandard materials and components arrive in production? Will rework levels be driven higher? Is there greater load on engineering and processing staff trying to make lower quality material run properly? What is the overall impact on the profitability of the company – this quarter, this year, for the next five years?

Should productivity be measured with or without consideration for quality or customer returns? What are the implications of holding production accountable for quality problems that are inherent in the process or the product design? What happens when some

Forget about whether or not we are trying to maximize profit;
there are all of the competing needs of the various functions and
departments within the company.

Two important but simple aspects of the measurement system are at work here.

The first is the clarity provided in terms of expectations for the coaches and players, teachers, principals and students. The right metric and measurement process provide the basis for goals and objectives. They reduce ambiguity and uncertainty.


The second is the means for measuring performance. Add a target to the measurement process and you instantly have a means for comparing performance to a baseline or expectations, or for comparing performance between individuals and teams.

There is no doubt that this applies in the business environment as well. In fact, it is likely that the business model has spilled over into education, healthcare and sport. What might be less clear in business, however, is – what are the right metrics and targets? At the macro level there is often debate about whether the organization should maximize profit or “optimize” profit with greater consideration for the environment, employee well being, customer satisfaction or long term sustainability.

At a micro level there is even more difficulty. Forget about whether or not we are trying to maximize profit (or control costs); there are all of the competing needs of the various functions and departments within the company. What are the implications of sourcing “low cost suppliers” in purchasing? Who wins and who

employees are on piecework and others are not? How do “localized” or machine throughput targets affect overall WIP levels, material utilization, lead time, or for that matter, customer satisfaction? Does your customer benefit from a warehouse full of raw material, components or subassemblies?

How does your organization measure maintenance performance? How much time is spent repairing equipment vs. preventing failures? If you measure and reward less downtime on your equipment are you effectively encouraging shortcuts that bring the equipment back into service faster, but fail to resolve the problem permanently, only to have it reoccur in the short-term and possibly even shorten the life of the equipment in the long run? How does a 100% on time delivery policy affect quality, shipping costs, or overtime?

In the end, every company needs to review its measurement system for conflicting and inconsistent metrics, since what management pays attention to through the measurement system is one of the major drivers of employee behaviour. Measurements have a major impact on what employees pay attention to, which is good, however few employees will consider the impact of their behaviour on the broader, more macro level business metrics – this is where management needs to ask “What to measure and how to measure it?” 

COLLABORATIVE LEADERSHIP IN OUR COMMUNITY

Using all the cooperative help we can get

by ANNE LAVENDER



ANNE LAVENDER is Executive Director of Leadership Waterloo Region, which offers a ten-month leadership program focused on critical community issues and the leadership skills necessary to address them.

Successful communities do not just happen. They are generally the result of strong, effective community leadership. Traditionally, individual leaders could have a significant impact in this regard. But in these increasingly complex times, really successful larger communities usually are the result of collaborative

of it as typical of the northern rustbelt of the United States, a once vibrant steel town that fell on hard times with the collapse of the domestic steel industry. But this picture is out of date, which is one reason the city was chosen for the meetings.

Pittsburgh's turnaround has been remarkable. It is

In today's highly competitive environment we cannot rest on our laurels, and we cannot rely on a handful of community leaders to keep us a strong and vital community.

leadership, where significant numbers of community leaders pool their talents and resources for the greater good of the community.

An example of such a community is Pittsburgh, Pennsylvania. It comes to mind since it was in the news some months ago when this city hosted a meeting of world leaders. People who were not familiar with the recent history of Pittsburgh may have thought

now a thriving centre for high-tech innovation, education, medicine, research and development. Pittsburgh was recently named by Forbes magazine as one of America's best cities for job growth, and it has been ranked as one of the most liveable cities in the United States. This remarkable success is the result of a major, organized, collaborative effort by community, university and corporate leaders and state and local officials. It



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is a great example of what good collaborative leadership can do for a community. No wonder the U.S. wanted to show it off to world leaders.

Community social profit organizations tend to be under-resourced at the best of times, and the current economic climate does not represent the best of times.

Waterloo Region is by no means facing the same crisis that spurred Pittsburgh into action. Indeed, in many ways our community is envied for its success and prosperity. But in today's highly competitive environment we cannot rest on our laurels, and we cannot rely on a handful of community leaders to keep us a strong and vital community where people want to live and raise families, and can find meaningful employment.

Collaborative leadership, however, can help us achieve these objectives. Fortunately, several exciting initiatives are already underway in Waterloo Region. A good example is the Prosperity Council of Waterloo Region, formed about six years ago by the Region's Chambers of Commerce, Canada's Technology Triangle Inc. and Communitech. The Council's objectives include enhancing our regional health and post secondary institutions, and our local arts and culture.

With regard to arts and culture, it has undertaken the Creative Enterprise Initiative. The purpose of the Initiative is to find ways to further develop our arts and culture environment, linking it to a far wider range of economic activities, all with a view to enhancing our community's quality of life while attracting and retaining the work force required for a successful community. The Initiative, comprising leaders from the educational, arts and culture, government, business and service sectors, is launching an enabling organization for arts and culture in our region. While it is still a work in progress it does provide an excellent example of leaders from various sectors of the community working collaboratively for the good of the community. And this is just one of several similar collaborative initiatives being undertaken by the Council.

Another new and interesting collaborative venture is called Capacity Waterloo Region. Capacity Waterloo Region's objective is to develop an enabling environment that brings together resources from all sectors to support the people and ideas that build lasting social change. It aims to fuel social innovation. It will do this by building support systems that will strengthen and connect our social leaders, helping them to realize their full potential, and that of their organizations.

Community social profit organizations tend to be under-resourced at the best of times, and the current economic climate does not represent the best of times. Through a collaborative effort, Capacity Waterloo Region intends to help organizations overcome these limitations. Again, leaders from various community

sectors are coming together to drive this initiative.

Any discussion of collaborative leadership would not be complete without mention of Leadership Waterloo Region, of which I am privileged to be the Executive Director. One of the mandates of our organization is to enhance the networking capabilities of community leaders. Graduates from our community leadership program, who come from all sectors and from varied backgrounds, become part of a network now connected to each other and to established community leaders for the betterment of our community. The relationships that are built as a result dramatically increase opportunities for collaborative leadership.

Really successful larger communities usually are the result of collaborative leadership, where significant numbers of community leaders pool their talents and resources.

I have touched on just a very few of the examples of collaborative leadership to be found in our community. It is important that such initiatives be supported and encouraged. It is in this way that the innovative thinking required for a prosperous and successful community is nourished and developed into meaningful actions that make a difference. X

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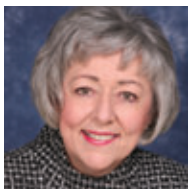
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PHILANTHROPY SIMPLIFIED

Donor Advised Funds – an attractive option

by ROSEMARY SMITH



ROSEMARY SMITH is CEO of The Kitchener and Waterloo Community Foundation. email rsmith@kwcf.ca.

Donor Advised Funds are a simple and easy tool for philanthropic giving. Pioneered by community foundations, Donor Advised Funds allow you to support the causes you care about with the help and assistance of trained professionals knowledgeable about the needs and issues of your community.

Community foundations are now joined by a number of educational institutions, commercial businesses, financial institutions, and independent charities who also offer this type of philanthropic service.

Establishing a DAF falls in somewhere between establishing a private foundation and giving directly to charity. Donors can name their fund, choose where the income generated by the fund is gifted, and also accept donations to their fund from others. One of the biggest

perks of setting up a DAF is the fact that donors can avoid expensive accounting, management, and legal costs typically associated with private foundations.

From making impactful grants, to connecting donors with opportunities, to providing leadership on key issues of importance, community foundations provide long-lasting support and nourishment to their communities.

Research tells us that DAFs are the fastest growing charitable giving vehicles. To begin, a donor sets up an account or fund with a third-party organization (such as a bank) or a foundation. The organization or foundation invests the donated amount, issues a tax receipt, and then allows the donor to disburse income generated by the gains from their investment to charitable causes.

The amount a donor can distribute each year is determined by a rate set by each organization or foun-

These funds provide an opportunity for the type of donor who is interested in doing more than write a cheque and collect a receipt. DAFs are an effective approach in coordinating charitable giving for the long term. Donors contribute to their fund each year and direct funds to the causes they care about most.

Is there a difference between DAFs held at a finan-

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cial institution and DAFs held at a community foundation? The biggest difference here is something I alluded to in the first paragraph. Community foundations

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are in the business of building community. It underlies all that they do. From making impactful grants, to connecting donors with opportunities, to providing leadership on key issues of importance, community foundations provide long-lasting support and nourishment to their communities.

In the words of Community Foundations of Canada: Community means so many things to so many people, and the world to us. In all we do and all we say, we're all for community.

Because of the work they do, it is essential that community foundations have a genuine understanding of the needs and trends of the communities they serve. Due to their research and

grant application processes and through their participation in leadership projects like Vital Signs, community foundations are knowledgeable about what makes their community tick and are able to distinguish what is needed to make their home a better place to live, work, play, and grow. Their focus is their own community.

They talk with local charitable organizations – learning about the innovative programs on which they are working to better assist those who need their services.


They collaborate – sometimes leading the charge, but not always. More often than not, they support the good work being done by others.

And they connect. They use their knowledge of the community to assist others in making informed decisions about philanthropy – joining causes and people. Community foundation staff assist donors every step of their philanthropic journey – answering questions, exploring, and providing sound advice. This is what makes community foundations stand out from other organizations and financial institutions who also provide DAFs.

Alternatively, banks have been recog-

nized for their investment flexibility and expertise. However, assume no grant support to donors. DAFs with banks are often used as a vehicle to support national causes. Donors take responsibility for determining their own granting paths and ultimately make final grant selections. The opportunity to research and better understand their community rests solely with the donor.

**Establishing a DAF falls in
somewhere between establishing
a private foundation and giving
directly to charity.**

In considering a charitable giving vehicle, Donor Advised Funds make a great option – especially if you are planning on giving for the long term. If you want your philanthropy to be informed and make an impact where you live, community foundations offer knowledgeable assistance that can help you make the lasting difference you're looking for. 



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GOOD PEOPLE DOING BAD THINGS

As the economy shrinks, white collar crime grows

by DENNIS GRIMM



DENNIS GRIMM is a partner with the Waterloo Office of PricewaterhouseCoopers LLP and can be reached at dennis.grimm@ca.pwc.com.

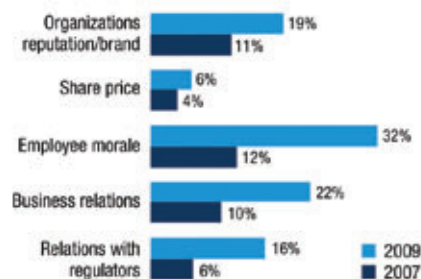
While logical but often not appreciated until it is too late, is the reality that as the economy shrinks, white collar crime grows. A recession tends to make good people do bad things. Recently, PricewaterhouseCoopers published its 2009 Global Crime Survey, which reinforced the disturbing fact that white collar crime is on the rise in Canada.

The survey shows Canadian white collar crime is more wide spread and more embedded in the grass roots of Canadian businesses than one might have thought. While Ponzi schemes currently under investigations and the government financial frauds grab the headlines, it is the frequency on fraud that should receive our attention. Of those companies surveyed, 56% reported they were victims of fraud in the last twelve months. This is up from 52% in 2007.

workplace is growing in its significance in Canadian business. A company that does not address fraud in its risk management strategy does so at its own peril.

Fraud can take several forms, each of which results in loss to the organizations affected. Twenty-four percent of those Canadian companies reporting that they were victims of fraud over the past year experienced a direct loss of over \$500,000 USD. However, the indirect costs can be just as worrisome. The following chart summarizes what collateral damage occurred globally to corporations reporting incidences of fraud in 2009 compared to 2007.

Global Companies Reporting Collateral Damage (2007 - 2009)



% respondents who experienced economic crime in the past 12 months for 2009 and in the past two years for 2007

Canadian white collar crime is more wide spread and more embedded in the grass roots of Canadian businesses than one might have thought.

More disturbing is that only 30% of the global companies surveyed reported being a victim in the same period. This was a significant drop from 43% in 2007. The question is: Is Canada becoming a hot bed of white collar crime or are we better at finding it and reporting it? My experience would lead me to believe that the latter is the primary explanation for the Canadian reported trend, although the issue of fraud in the

Canadian companies tend to downplay the collateral damage. This would appear to not be a best practice. Experience has shown, for example, that negative employee morale directly correlates to reduced performance and future detrimental behavior including new and additional economic crimes. In other words, ignoring the problem only proves to make the problem worse.

Fraud is not restricted to employees, although once again Canadian experiences differ from the global experience. Globally,

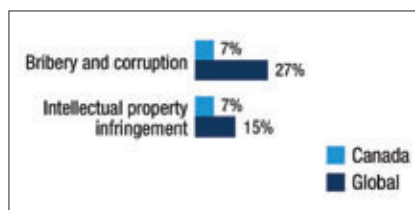
Much work needs to be done by corporate leaders to educate employees on their responsibility to report economic crime, create a whistle blowing culture.

44% of the companies that were defrauded in Canada were done so by external fraudsters. Globally, external fraudsters accounted for 59% of the incidents.

By far the most prevalent type of economic crime reported was asset misappropriation – 83% Canada, 67% Global. However, accounting fraud is becoming more significant (31% Canada, 38% Global). Once again, this could be the result of the light being shone on accounting fraud over the past several years. Also, money laundering is twice as prevalent in Canada (28%) than the rest of the world (12%). This hopefully is the result of recent stronger anti-laundering legislation in Canada that legally requires suspected incidences of money laundering to be reported, compared to many countries that do not have such legislation in place. The significantly higher incidences of money laundering in Canada more likely speaks to how significant and serious this crime is globally more than a Canadian

specific problem.

The other economic crimes were reported as follows:



The 2009 PricewaterhouseCoopers Global Economic Crime Survey also gave us a window on how the frauds were detected. As in prior years, findings most of Canadian white collar crimes were detected as a result of an internal or external tip (39% of the incidences were discovered in this manner). Internal audit activities detected 14% of the Canadian frauds, while 17% were credited to actual fraud risk management activities. Interestingly, Canadian companies were twice as likely to detect fraud through the use of electronic tools. One such tool that we have found effective is a software package that isolates unusual or suspicious journal entries.

Given that 38% of Canadian frauds were detected as a result of a tip-off, one would think that an organization's formal Whistle Blowing program would be a powerful tool. However, Whistle Blower programs accounted for only 3% of Canadian detections (7% Global). Clearly, much work needs to be done by corporate leaders to educate employees on their responsibility to report economic crime, create a whistle blowing culture and to act swiftly and supportively when a reporting does occur. The tool is only

effective when it permeates the culture.

The current economic downturn has created a Perfect Storm for economic crime. One of the most identified reasons given by the fraudsters for committing their crime was fear of job loss, followed by not getting their bonus. In other words, NEED – or at least perceived need on the part of the fraudster – remains the most pronounced motivator to commit fraud.

With the current economic downturn Canadian organizations have had to reduce oversight resources and unfortunately internal controls have tended to weaken. This creates the OPPORTUNITY for economic crimes to be perpetuated.

GREED, the third basic motivator, is always present and fuels many crimes. In an environment of weaker internal controls and less oversight resources available to detect and deter such crimes the OPPORTUNITY to defraud a company appears more attractive. Employees and external fraudsters motivated by NEED and/or GREED will try to seize the OPPORTUNITY created by downsizing and the reduction of oversight resources. Need, Greed and Opportunity have created the Perfect Storm.

The survey found that 69% of those surveyed have not changed their frequency of conducting fraud risk assessments. To prepare to sail the Canadian Corporate waters in the years ahead without looking at the growing incidences and motivating factors contributing to economic crime would be like sailing into the Perfect Storm ill prepared. At times like this, like it or not, Good People will try to do bad things. X

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A GREAT WAY TO DO PHILANTHROPY

Translating talent and energy into dollars for charity

by PAUL KNOWLES



PAUL KNOWLES is Editor of Exchange Magazine for Business; his latest book is called "Escaping Eden"; paul.knowles@exchangemagazine.com

There are plenty of ways to be philanthropic, all of them good. This area is noted for announcements of enormous philanthropic donations, from time to time; often, they are made by people associated with some of our leading corporations, such as Research in Motion.

My favourite kind of philanthropy is the win-win-win kind that finds ways to convert energy and talent into financial donations.

Those multi-million dollar donations deserve headlines, but it's good to remember that philanthropy happens at every level, as companies and individuals try to – in the often repeated phrase – “give something back to their community.”

Philanthropy happens when companies organize “dress down days”, and employees kick in a buck or two for the right to wear jeans to work; when people donate to legitimate charities (and please do your homework on this!) through door to door canvasses;

when someone writes a cheque or arranges automatic debit for a good cause; when someone signs up sponsors because they're going to participate in a something-a-thon.

All very good stuff.

My favourite kind of philanthropy is the win-win-win kind that finds ways to convert energy and talent into financial donations. I'm especially fond of any fundraiser that involves the arts – and that's where the “win-win-win” comes in.

An arts and culture philanthropic endeavour is a win for the audience, who get to enjoy talented performances while knowing the money is going to an important cause. It's a win for the performers, who are able to turn their talent into tangible benefits for a charity (and this is key because most arts and culture workers

don't have the financial means to donate significant moneys to any cause other than their own rent and refrigerator). And it's a win for the receiving charity, which garners, not only the proceeds, but also the publicity linked to the artistic event.

On a local basis, I've been involved in a fair number of such efforts, not the least of which is the annual Dickens Christmas Carol reading in New Hamburg, where we invite top-level actors and musicians to perform as volunteers, with all proceeds from ticket sales

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going to a local charity, the Wilmot Family Resource Centre and food bank. This pulls in about \$3,000 a year for a good cause... and also provides a wonderful evening of seasonal entertainment for a full house of about 250 people.

I attended a really fine example of using artistic talent in a philanthropic cause in Toronto recently – “Heart & Music”, a night of song and dance which raised funds for ovarian cancer research.

The event was created by a man with local roots – Darrin Bast is a Tavistock native, now living in Toronto. His parents still live here; his Mom is being treated for ovarian cancer.

Darrin founded The Teal Heart Award, a scholarship fund to enhance the training of young Canadian scientists who are participating in ovarian cancer research.

And he decided that the best way to kick this off was with a night of entertainment, involving the volunteer talents of some very fine Canadian singers and dancers. So a convoy of us from south-western Ontario mingled with a crowd from downtown Toronto, and enjoyed a superb example of arts and culture philanthropy.

The stars of the show included Mark Cassius, who sang for years with the Nylons; Marisa McIntyre, star of Mamma Mia!; Adrian Marchuk, from Jersey Boys; my friends, classical singers Vicki St. Pierre and Erin Bardua; and Kitchener's own Queen Street Conservatory dancers. And dozens more, 52 performers in all.

The real star of the show was Darrin's mom, who was roundly cheered when she was introduced.

That is philanthropy with a
very big heart.

Darrin also commissioned several paintings, which were auctioned off – one of them, a wonderful piece of work by the artist Kent Bridges, now hangs in our foyer.

After the event, Darrin sent an email thanking everyone, and announcing: “Together we raised over ten thousand dollars for my Teal Heart Scholarship Fund through Ovarian Cancer Canada which will support research that one day will lead to a cure to a terrible disease. I thank you for supporting HEART & MUSIC and indirectly, me and my Mom.”

That is philanthropy with a very big heart. Congratulations, Darrin. ✕



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Members of families affected by Juvenile Diabetes are flanked by officials who participated in the announcement of the new JDRF Clinical Trial Network Centre.

THIS REGION IS ONE STEP CLOSER to becoming a world-class hub for diabetes research. **Juvenile Diabetes Research Foundation Canada** has announced that the **University of Waterloo**, in alliance with **McMaster University**, will serve as the **Centre for its Clinical Trial Network**.

In November 2009, the federal government made a commitment of \$20 million to support the launch of a Clinical Trial Network for diabetes research,

funded by the **Federal Economic Development Agency** for Southern Ontario (FedDev Ontario). JDRF is contributing an additional \$13.9 million, resulting in a \$33.9 million investment that will help bring new technologies to the marketplace, so that Canadians and people around the world can benefit.

"Our government's **Economic Action Plan** investments in type 1 diabetes research will create the jobs of the future and keep southern Ontario at the forefront of innovation and research," said the **Honourable Gary Goodyear**, Minister of State (FedDev Ontario), and Cambridge MP, at the announcement. "As the clinical trial network project progresses, we are closer to achieving our goal of creating jobs, strengthening the economy and improving Canadians' quality of life."

Andrew McKee, President & CEO, JDRF Canada, added, "We are delighted to select this Centre as we progress with this exciting initiative. This partnership is about utilizing Southern Ontario's greatest strengths to create a research network unique in both Canada and the world. This announcement moves us that much closer to achieving this goal."

In addition to creating highly-skilled jobs, this new partnership will diversify Ontario's economy into research fields for which there are worldwide needs, and attract international researchers and institutions to the province.

"Waterloo welcomes the opportunity to deepen our already broad involvement in health-related research by collaborating with JDRF and McMaster on this innovative approach to the management of clinical trials," said **David Johnston**, President of the University of Waterloo. "The Centre will provide a Canadian beachhead for clinical trial activities aimed at reducing the impact of diabetes."

University of Waterloo is one of the world's best technology and data management institutions, and McMaster University currently operates the largest set of clinical trials in Canada.

CHICOPEE SKI & SUMMER RESORT & DAVE FM 107.5 raised \$25,225 for the Women's Crisis Services of Waterloo Region through the Ski Down Wednesdays promotion featuring a discounted skiing and snowboarding day. From January 13 to March 10, \$5 from each full day lift ticket sold was donated to the Women's Crisis Services of Waterloo Region – Anselma Rebuild Program.

Women's Crisis Services is part of a network of community services and opportunities available to women and children to aid in the development of new family patterns in an atmosphere of trust and openness. The "Rebuild Anselma House...Rebuild Lives" campaign is working to build a new Anselma House shelter and the services that go hand-in-hand.

Margaret Attwell, Fund Development Manager for the Women's Crisis Services capital campaign, said "We would like to thank Chicopee and DAVE FM for partnering with this generous donation [which] will help rebuild Anselma House and give women (with or without children) suffering from abuse a safe place to come."

"We are pleased the community has come to play with us and support Chicopee with this great cause. To surpass our goal of reaching a \$25,000 contribution to the Rebuild

Anselma House campaign is a wonderful achievement. We are consistently looking at unique ways to work with and give back to our surrounding community. We're proud of our associations with other programs such as the COPS program out of the Centreville-Chicopee Community Centre, the Food Bank and organizations such as Waterloo Region Track 3 Program," said states Reg Verley, Executive Director of Chicopee Ski & Summer Resort.

ON JUNE 4-6, 2010, Waterloo Collegiate Institute will be celebrating its 50th year through Homecoming. There will be a fantastic social event (Full to the BRim) at RimSoccer Park (indoor) Friday evening. Saturday, there will be athletic events, an off-site golf tournament, a car show, a performing arts series, a dinner/dance gala event, all spliced together with memorabilia, souvenirs and friendships rekindled and revived. Registration can be completed at www.wci50th.ca.

MTE CONSULTANTS INC. has launched an endowment fund supporting five engineering technology awards at **Conestoga College**. Conestoga President **John Tibbits** was present at MTE's Kitchener office for the official signing of the agreement by MTE's President **Greg Marks** and Vice-President **Angelo Innocente**.

The \$25,000 financial commitment made by MTE will be matched by the Ontario Government's Ontario **Trust for Student Support** program, and will ensure that the five awards are supported in perpetuity. The purpose of the fund is to provide an annual award to a student in each of the following programs: Architecture - Construction Engineering Technology; Architecture - Project and Facility Management; Civil Engineering Technology - Environmental; Civil Engineering Technology; and Environmental Engineering Applications.

"While we have sponsored these awards for several years through annual donations, we chose to make this pledge in 2010 as a compliment to our 25th anniversary. Over the past 25 years, we have made it a part of our culture to give back to the communities we work in and serve," said Marks. "This pledge helps illustrate the dedication that our staff and the company embody. We are honoured that we will forever be connected with Conestoga College through this fund and the awards it supports."

COLDWELL BANKER PETER BENNINGER REALTY celebrated their 25th Anniversary by holding a spectacular Fundraising Gala benefitting **Habitat for Humanity** that will change the life of a local family, turning their dream of home ownership into a reality.

"I am absolutely thrilled that our 25th Anniversary Building Dreams Gala raised more than \$100,000 for this wonderful cause," said **Peter Benninger**, President of Coldwell Banker Peter Benninger Realty. "We should all be proud to call such an outstanding and generous community home."

The Gala, held in the **Bingemans Ballroom** and MC'd by **Neil Aitchison**, was a full evening of entertainment that included a performance by **The Kenny Munshaw Band**, as well as live and silent auctions offering exciting items including an authentic 2010 Olympic Torch. The Olympic Torch package that also consisted of lunch at Waterloo Restaurant Uptown 21 with **Cheryl Pounder**, two-time Olympic gold medal winner with Team Canada, and an autographed Team Canada hockey sweater, prompted a bidding frenzy and was sold for \$3,200!

"Habitat for Humanity Waterloo Region works toward a world where everyone has the opportunity of a safe and decent place to call 'home,'" said **Dr. Cristina Vanin**, Board Chair for Habitat for Humanity Waterloo Region. "We cannot pursue this mission without the support of our community leaders. We are profoundly grateful for the continued leadership of Peter Benninger. The proceeds from the Building Dreams Gala will make possible at least one more simple, decent, and affordable townhome that will be sold to a deserving family, the third made possible by Coldwell Banker Peter Benninger Realty."

According to **Ken Freeman**, Executive Director for Habitat for Humanity Waterloo Region, the proceeds from the Building Dreams Gala will be used to sponsor the first of 16 units in a townhouse condominium complex at 23 Howe Drive, Kitchener.

"This is the second instance of Coldwell Banker Peter Benninger Realty anchoring one of our condominium complexes," said Freeman. "In 2006, the first townhouse at 170 Cherry Street, Kitchener, was similarly made possible through support from the 2005 Building Dreams Gala. It is assuring to know that they can be counted on to play a leadership role when it is needed."

The Gala was attended by over 600

guests and included more than 50 corporate tables, highlighting the high level of support from businesses in the Region. Local, provincial and federal politicians were also in attendance.

MENNONITE SAVINGS AND CREDIT UNION has been named among the Top 50 Best Small and Medium Employers in Canada. A newcomer to the list, MSCU was ranked 47th in the study published annually by the **Globe and Mail** and **Profit Magazine**.

"For MSCU to be included on this prominent list of Canada's leading workplaces is an honour," said **Brent Zоргdrager**, MSCU CEO. "What's most gratifying is, the results are based on employee opinion, so this recognition represents the voice of our staff who are thriving in an atmosphere where they can daily live out our values of integrity, compassion and responsible stewardship."

COMMUNITECH, WATERLOO REGION'S tech organization representing more than 700 companies, has opened an office to service the growing needs of Cambridge, Guelph and area.

"We're delighted to have a new office in Cambridge," said **Iain Klugman**, President and CEO of Communitech, "We have long recognized the innovation in the communities of Cambridge and Guelph, and having a 'storefront' here will help us better meet the needs of technology companies."

The new office is part of a concerted outreach effort to identify and support a growing number of technology companies in Cambridge and Guelph. Communitech has also engaged a senior business development and marketing professional to work directly with tech companies through the Cambridge office. The new office and outreach activities have received financial support from the federal government through the **NRC-Industrial Research Assistance Program**.

"Cambridge, Guelph and the surrounding area have significant strength in sectors like advanced manufacturing, power generation, biotechnology and aerospace," continued Klugman, "This local presence will support and connect these businesses to one another, and to the rest of the Waterloo Region tech industry."

The Communitech network includes leading technology companies in Cambridge and Guelph such as **COM DEV**, **ATS Automation**, **Babcock Wilcox**, **Moxy Media** and a host of emerging

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technology companies, such as **Ladybug** and **Well.ca**.

The new Communitech office is located at Can-Amera Corporate Center, 231 Shearson Crescent in Cambridge.

COM DEV INTERNATIONAL LTD. has announced that it has been selected by **EADS Astrium** to provide passive microwave equipment for a series of four commercial communications satellites. COM DEV will supply switches, filters and multiplexers for use on the satellites which EADS Astrium is building for SES S.A. The satellites will deliver next generation broadcast, VSAT and broadband services in Europe and Africa.

COM DEV has initially been awarded authorizations to proceed (ATPs) valued at CDN\$2.8 million. The ATPs are expected to lead to full contracts valued in excess of CDV\$14 million, with work scheduled to be completed by early 2012



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at COM DEV's facility in Cambridge, Ontario.

"EADS Astrium has been a customer for decades, and we're very pleased with the confidence they've shown in selecting us for a multi-satellite program," said **John Keating**, CEO of COM DEV International. "These satellites will provide both replacement and incremental capacity, demonstrating the ongoing trend of increasing demand for satellite communications services."

CANADA'S CO-OP PIONEER, the **University of Waterloo**, marked national co-operative education week by celebrating the academic and experiential achievements of its six top co-op students, including one who will also receive a provincial award.

Siaw Yun Poi, a third-year actuarial science student, received a Waterloo co-op student-of-the-year award during a national co-op week ceremony in March. The award recognizes Poi's achievements at Sun Life Financial, where she earned a reputation for original time-saving ideas for managing investments.

As well, she received a student-of-the-year award from Education at Work Ontario, an agency that advances co-op education and involves co-op educators working with more than 40,000 co-op students at 37 colleges and universities.

"Co-operative education is regarded as an effective means to support employers in the labour force while providing students with unique and invaluable learning opportunities," said **Peggy Jarvie**, executive director of Co-operative Education and Career Services at Waterloo. "The accomplishments of our six students of the year are an exceptional testament

to the value of co-op. They prove that co-op is not just a short-term employment solution; it's the best way to increase the overall value of post-secondary education while effectively preparing students for the working world. Their accomplishments have been nothing short of remarkable."

Winners of the co-op student-of-the-year are: Mathematics: **Siaw Yun Poi**; Applied Health Science: **Roseanna Pre-sutti**; Arts: **Lauren Theobalds**; Engineering: **Tewodros Mamo**; Environment: **Sameer Shah**; Science: **Stephanie Dobson**.

SANDVINE, A LEADING PROVIDER of intelligent broadband network solutions for cable, DSL, FTTx, fixed wireless and mobile operators, has entered into an agreement with the Province of Ontario in respect of certain innovative research and development activities.

Under the agreement, Sandvine will be eligible to receive funding equal to 11% of related, eligible costs incurred in Ontario from February 2009 to February 2014 to a maximum of \$18.7 million. In addition, at the end of the agreement, the company will be entitled to receive up to an additional 4% of such costs (to a maximum of \$6.8 million) if certain Ontario-based job targets have been met.

"The provincial government has demonstrated a real commitment to Ontario as a technology leadership centre, both within Canada and globally," said **Dave Caputo**, Sandvine's president and chief executive officer. "This funding gives Sandvine a tremendous opportunity to continue to advance our research and development activities right here at home."

THE SENATE of **Wilfrid Laurier University** has approved a new academic plan that will guide the university's academic planning over the next five years. The plan merges the 2005 Century Plan with the values, vision and mission statements created through the 2008-09 Envisioning Laurier process, and identifies the core principles and academic domains that make Laurier unique.

"The academic plan is intended to be foundational as well as aspirational," said **Deb MacLatchy**, vice-president: academic and provost.

The academic plan emphasizes Laurier's tradition of teaching excellence, sense of community and student experi-

ence, along with the university's growing research intensity and graduate programs.

"The plan describes Laurier's uniqueness as an institution while identifying that we need to work from our foundation to address our role as a university of the 21st century," said MacLatchy.

The academic plan recognizes that as a multi-campus university, there is value in having variety in scope, specialization and core academic strength among Laurier's campuses. This variety is dictated by the strategic location, history, vision, academic profile and student-learning environment of each campus.

The academic plan also outlines Laurier's six domains, defined as the strategic areas, or spheres of influence, where Laurier faculty and students excel and where the university seeks to maintain or develop national and international recognition: Professional programs, Governance, Environment, Health and well-being, Social and cultural analysis, Cultural and artistic production.

GWYN MORGAN, founder and former CEO of **EnCana**, and his wife **Patricia Trottier**, join a select group of Canadians who have made a significant contribution to the **Shad Valley** program.

The couple has donated \$50,000 to Shad Valley, a Waterloo-based not-for-profit focused on identifying high potential future achievers, and unleashing the entrepreneurial and innovative potential of these exceptional youth.

"This extraordinarily generous gift reflects Gwyn and Patricia's passion for youth and innovation," Shad president **Barry Bisson** said. "Their generosity will support Shad's investment in providing our life-changing, life-directing experience to 500-plus talented youth this summer."

Gwyn Morgan, who is an honorary director of Shad Valley, said, "In July 2009, Pat and I engaged with the amazing young people in the Shad Valley program at Queen's University. We witnessed the tremendous impact this program has on developing the scientific and entrepreneurial potential of exceptional high school students. We believe if Canada is to be a global leader in the knowledge economy, these bright young high achievers must be nurtured and encouraged to excel so that they can realize their full potential. As a result of our visit to Shad Valley at Queen's we now fully understand why this great organization has such a long successful track record in providing a trans-

formational experience that inspires talented and dynamic young Canadians to become the best that they can be."

Celebrating 30 years of excellence in 2010, Shad Valley, headquartered in Waterloo and offering programs at 10 prestigious Canadian universities, is Canada's premiere experience for the next generation of leader-innovators - talented students interested in harnessing and strengthening their talents in an intense month-long immersion. Visit www.shad.ca

PAUL LORENTZ has been named Senior Vice President, Investment Products and President, **Manulife Investments** to lead Manulife's future growth strategy for investment products in Canada.

As President of Manulife Investments, Lorentz will lead the organization that specifically focuses on investment fund products, including segregated funds, mutual funds, annuities and guaranteed products.

"This is a new senior executive position in our Canadian business that reflects our view that our Wealth Management business holds tremendous potential," said **Roy Firth**, Executive Vice President, Individual Wealth Management, **Manulife Financial**. "We are strategically focusing on our wealth operations to ensure we are well-positioned to leverage these opportunities."

Manulife recently acquired **AIC** retail funds and **Berkshire-TWC Financial Group** and is recognized as an industry leader for its innovative and award-winning products.

Lorentz, who has worked in various Manulife businesses since joining the company in 1993, most recently led Manulife's Distribution organization that delivers the expertise, service and information to support Manulife's many distribution partners and more than 40,000 advisors across the country.

THE CO-OPERATORS has raised \$298,270 for the **Canadian Red Cross** in support of the organization's relief efforts for victims of the earthquake in Haiti. A total of \$149,135 was donated personally by Co-operators employees, agents and their staff, directors, delegates, members of its Community Advisory Panels and students who participated in IMPACT! The Co-operators Youth Conference for Sustainability Leadership. The Co-operators matched these contributions dollar-for-dollar.

"Canadians and people around the world were deeply saddened by the devastation in Haiti, and were moved to give generously to help the survivors in Haiti rebuild their communities," said **Kathy Bardswick**, President and CEO of The Co-operators. "Our organization's commitment to match contributions helped our staff, agents and others to maximize the impact of their gifts to a country that urgently needs help."

The decision to match personal contributions through The Co-operators Foundation was made quickly following the earthquake that struck Haiti on January 12, 2010. An estimated 3 million people were affected, including well over 200,000 who lost their lives.

AS ONE OF THE CORNERSTONES of **wilfrid Laurier University's** ICT renewal plan, the university is implementing a new learning management system to support teaching and learning. Effective August 1, 2010, Laurier will begin a five-year contract with local company **Desire2Learn**.

"The contemporary university environment needs solutions that allow learning to take place both inside and outside the classroom," says **Tom Buckley**, assistant vice-president: academic services. "We believe that D2L provides a solution that will support our faculty and students in this regard."

With more than 94% of Laurier's classes incorporating an online component, the university's teaching, learning and technology steering committee explored alternatives that would best meet Laurier's needs, both now and into the future.

John Baker, president and CEO of Desire2Learn, says the company is thrilled to be working with Laurier. "We look forward to working collaboratively with the university to help transform the teaching and learning experience," says Baker. "Desire2Learn is committed to ensuring a smooth transition, and we will help the university to leverage technology in support of improved student outcomes and strategic objectives."

THE KITCHENER AND WATERLOO COMMUNITY FOUNDATION and the **Cambridge & North Dumfries Community Foundation** have been named silver award winners for excellence in communications by the **2010 Wilmer Shields Rich Awards Program**. Sponsored by the Council on Foundations, the awards program recognizes effective communications efforts to

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increase public awareness of foundations and corporate giving programs. The two community foundations received the award in the Special Report category for their collaboration on the third Waterloo Region's Vital Signs report released on October 6, 2009. The report is an annual community checkup that measures key areas critical to Waterloo Region's quality of life. Waterloo Region's Vital Signs has won an award in the same category since the inaugural 2007 report.

"It is a tremendous honour to be recognized three years in a row for our commitment to providing impactful and thought-provoking communication pieces for our community," says **Rosemary Smith**, CEO of The Kitchener and Waterloo Community Foundation. Adds **Jane Neath**, Executive Director of the Cambridge & North Dumfries Community Foundation, "There are 92 awards being presented by this prestigious awards pro-

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gram and we are one of only four Canadian foundations being recognized – what an incredible accomplishment!”

CRAWFORD & COMPANY (CANADA) INC. has been recognized by **The 10,000 Trees Project of KW Region** for their efforts in environmental preservation through the planting of hundreds of trees during the 2009 Crawford Global Day of Service. The Corporate Tree Hugger Award is given each year to recipients that have made a significant contribution to the efforts of 10,000 Trees Project be it through volunteer hours and/or financial contribution.

“We at The 10,000 Trees Project are delighted to have a partnership with such a forward thinking and creative company,” said **Barbara Larke** as she presented the award to Crawford. “Indeed this is a company that truly demonstrates its belief in the importance of ‘thinking globally and acting locally.’”

Further detail about the Corporate Tree Hugger award can be found at www.10000trees.org/awards.htm.

OPEN TEXT CORP. says it plans to increase its workforce by nearly 12% over the next five years as it adds new jobs in Waterloo, Ont., Richmond Hill and Ottawa.

The Waterloo-based software firm said Thursday that 400 new jobs would be added as part of a \$225-million product development plan partly funded by the provincial government.

“One of the drivers for this investment is the digital media sector which offers opportunity for growth and innovation,” said president and chief executive **John Shackleton** of Open Text.

The Ontario government will contribute \$33.75 million to the initiative.

As of last June, Open Text had 3,411 employees across its operations.

CAPACITY WATERLOO REGION (CWR), a five-year pilot project to build an enabling environment that brings resources from all sectors together to support the people that build lasting social change, has announced that **Cathy Brothers** has officially joined the project as its first-ever Executive Director in Residence.

“We are very pleased to welcome Cathy into her new role with Capacity Waterloo Region,” said **Tim Jackson**, chair of the project’s steering committee. “Our community is going to benefit tremendously from her vast leadership experience and passion for social change. We couldn’t ask for a better champion for the sector.”

In addition to playing a lead role in shaping this one-of-a-kind program, Brothers will work one-on-one with top leaders in Waterloo Region’s highly diverse non-profit and social venture sector to accelerate their organizational innovation and personal growth.

Brothers was most recently Executive Director of **Mosaic Counselling and Family Services**, a position she held since 1992.

BRICK BREWING CO. LIMITED has entered into a sales agent agreement with **AMCA Sales & Marketing** for Atlantic Canada. The new agreement will continue to December 31, 2012. AMCA will represent the Brick brands in Atlantic Canada.

“The opportunity to extend our products into Atlantic Canada presents a significant opportunity for strong organic growth of our award winning brands and is very exciting news for Brick Brewing” said **George Croft**, President and CEO. “Our vision is to be the best Regional Brewer and Co-pack producer in Canada. We have worked very hard to find the right partner in Atlantic Canada and we believe AMCA is the perfect fit”.

Brick Brewing Co. Limited is Ontario’s largest Canadian-owned and Canadian-based publicly held brewery. The company is a regional brewer of award winning premium quality and value beers. The company, founded in 1984, was the first craft brewery to start up in Ontario, and is credited with pioneering the present day craft brewing renaissance in Canada. Brick has complemented its Waterloo

family of premium craft beers with other popular brands such as Laker, Red Baron, Red Cap and Formosa Springs Draft.

WATERLOO REGION BIO-TECH solutions innovator, **Biosmart Scientific Ltd.** welcomes **Wayne Shillum** as the company’s new sales manager. Shillum brings to the company 30-plus years of sales experience working with all sizes and types of manufacturing companies throughout Southern Ontario. Shillum replaces **Dietmar Wagner** who moved to another opportunity in January 2010. Shillum has a strong understanding of Lean Manufacturing processes combined with a sharp interest in helping companies maximize profits while implementing cost effective, environmentally responsible process improvements. He is also keen to expand access to products for home owners that will solve common household maintenance problems while reducing negative environmental impact.

With a rapidly changing marketplace and growing need for environmentally conscious industrial and home solutions, Biosmart realizes the need for strategic team development. In addition to the hiring of a new sales manager, in February 2010 Biosmart contracted the services of **Graf-Martin Communications Inc.** for marketing and business consulting.

JOSSLIN INSURANCE BROKERS LIMITED is pleased that through the personal contributions of their employees they have raised more than \$8600 for relief efforts in Haiti. Josslin corporately kick-started the project with an initial “seed” donation of \$1,000, and then matched all donations by employees, to reach the total gift of \$8600.

“Like many people around the world, we were extremely touched by the recent devastation and suffering in Haiti,” said **Don Wagler**, President of Josslin Insurance Brokers. “In response we established a fund where we matched employee contributions, with all proceeds designated to **Mennonite Central Committee’s** relief efforts in Haiti.”

“We are proud that our employees contributed just over \$3,800. This amount, combined with our matching funds, and the matching funds of the Federal Government, will total more than \$17,000 for the relief efforts in Haiti.”

“Supporting communities and individuals during catastrophic events is a core philosophy for our organization.” X

book chronicles many innovative social initiatives that have made a difference

organizations, share behaviours that cannot be explained by their parts. The

Flying somewhat below the radar is our innovation
in the social sector. Seemingly intractable problems like poverty,
mental illness, addiction and climate change require
imaginative solutions.

beyond their local communities and analyzes what made them successful. Included are projects as diverse as the development of Planned Life Advocacy Network (PLAN) in Vancouver in the late 1980's to assist children with disabilities as they become adults; the Grameen Bank in Bangladesh that spawned the micro-credit movement in third world countries; Opportunities 2000 that grew into Opportunities Waterloo Region; and Bob Geldof's Live Aid movement to assist famine relief in Ethiopia.

The commonalities in successful social innovations are difficult to precisely identify. Westley emphasizes that social systems are not machine-like and are always fluid and changing. She distinguishes among simple problems like baking a cake; complicated problems like sending a rocket to the moon; and complex problems like raising a child.

With simple and complicated problems, good recipes and formulae greatly increase the chance of success, but with complex problems, even previous success leaves the next outcome uncertain.

In "Getting to Maybe," the authors suggest that "All complex systems, from human beings to stock markets to global

whole is different than the sum of the parts. In complex systems, relationships are key – an organization is its relationships, not its flow chart. And this perception is crucial to understanding how complex systems differ from simple or complicated systems."

"Timing and the ability to read patterns are keys to social innovation," Westley suggests. A solution that solves a problem in one situation will not necessarily work in the next one where mitigating circumstances may be different. The social innovator perceives those differences and adapts. With any social problem however, Westley cautions, "You can never be sure you've fixed it."

Joe Mancini, founder of The Working Centre in Kitchener, is another local social entrepreneur who appreciates what Westley and SiG are doing. Mancini said, "Frances has extensive experience with change and innovation. More than that, she has a commitment to the process of development, helping communities to aspire to greater sophistication and achievements especially in the areas of sustainable development and mental health. Both need innovation and new ways of doing things. It is a real bonus for

our region to have this work going on."

Thomas Homer-Dixon, renowned author and Chair of Global Systems at the Centre for International Governance Innovation (CIGI) in Waterloo is also impressed by Westley. "Frances is brilliant at encouraging people to bring a diversity of ideas and knowledge to any given problem and then synthesizing novel solutions from this diversity. Her generosity of both intellect and spirit tends to bring out the best in people. And her enormous knowledge of innovation theory and practice allows her to guide groups towards solutions without any heavy-handed use of authority."

SiG's initiatives locally include working with youth through seminars on current issues such as climate change, establish-

Finding solutions to social
problems involves risk and
uncertainty.

ing a Master's degree program in social innovation at the University of Waterloo and working with former Senator Michael Kirby on his mental health initiatives.

By tackling society's complex social problems, Frances Westley and Social Innovation Generation are providing hope that maybe, just maybe, solutions can be found.

Readers wanting more information about Social Innovation Generation can visit their website at www.sig.uwaterloo.ca. X

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MAKING THE IMPOSSIBLE HAPPEN

Frances Westley and Social Innovation Generation are helping make Waterloo Region an incubator for creative research and development in the social sector

by BRIAN HUNSBERGER

Waterloo Region has long been known for innovation. In addition to pioneering work in agriculture and industry, this community gave birth to innovations as diverse as the development of municipal electricity and cooperative education. More recent innovations in the high tech sector are known world-wide.

advocacy and collaboration.

It is funded by the J.W. McConnell Family Foundation, the University of Waterloo and the Ontario government. Locally, support is also provided by the Lyle S. Hallman Foundation and the Cowan Family Foundation.

Paul Born, founder of Tamarack – An Institute for Community Engagement based in Waterloo – has been a social entrepreneur in Waterloo Region for over 25 years. Born told Exchange, “When David Johnston (University of Waterloo President), Ken Coates (Dean of Arts at University of Waterloo), Hulene Montgomery (Executive Director of the Lyle S. Hallman Foundation) and I sat down to discuss why we wanted to bid against the University of Toronto and McGill University to get SiG to come to Waterloo Region, we agreed that it was a perfect fit for a community already known for innovation in the private sector. We wanted to become a hotbed for social innovation as well. We are proud to have won a bid against two of Canada’s top universities.”

Dr. Frances Westley has what she calls a “classic interdisciplinary background.” Schooled in disciplines as diverse as English, Sociology, Religion, Environmental and Management Sciences, she knows that innovation frequently results from cross-fertilization and the ability to break out of traditional approaches.

Born in Chicago, she grew up in Montreal and taught at McGill University’s Desautels Faculty of Management and was also Director of the McGill-McConnell Program for National Voluntary Sector Leaders. She was then Director of the Nelson Institute for Environmental Studies at the University of Wisconsin-Madison prior to coming to Waterloo Region to found SiG in 2007.

Born adds, “We are so blessed to have been able to attract Frances away from Wisconsin in a reverse brain drain. She and Fred (her husband) loved Waterloo Region and always thought that they would like to live here. They resonated with our values and the ‘Waterloo way’.”

While working at McGill, Westley became aware that Dupont Canada was looking for an innovative project to sponsor. Rather than supporting a specific cause as other companies were doing, Dupont wanted

“Frances has a commitment to the process of development, helping communities to aspire to greater sophistication and achievements especially in the areas of sustainable development and mental health.” - Joe Mancini

Flying somewhat below the radar is our innovation in the social sector. Seemingly intractable problems like poverty, mental illness, addiction and climate change require imaginative solutions.

Social Innovation Generation (SiG) was created to address such issues. Affiliated with the University of Waterloo but located in downtown Kitchener under the leadership of Dr. Frances Westley, this organization fosters social innovation through research, education,

to foster social innovation itself. In 2002 the McGill-Dupont Social Innovation Think Tank was created.

Growing out of that, Westley, Brenda Zimmerman of the Schulich School of Business at York University and organizational development consultant Michael Quinn Paton wrote a book, published in 2006, called “Getting to Maybe”.

As the book’s title suggests, finding solutions to social problems involves risk and uncertainty. The

continued on page 45

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