



SAMANTHA NUTT:
LEADING INTO ACTION

LAZARIDIS: \$20 MILLION
FOR TECH LEADERSHIP



BLANK: "UNIQUE
CO-OP CULTURE"

EXCHANGE

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TRANSFORMATIONAL TIMES

Regional rookie called
on to head economic
development committee

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LAZARIDIS

School of Business & Economics

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WHEN IN DOUBT, TAKE THE STAIRS;
PROMOTING HEALTHY OPTIONS - PAGE 30

DEVELOPMENT

Exploring all the components of a healthy business community

by PAUL KNOWLES



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What do we mean by a “healthy” business community?

Of course, we mean “prosperous and successful.”

This issue has a tonne of articles about people who are working hard to increase our regional prosperity – the

chair of the Region’s Economic Development and Promotion Committee, for example, and the Ball family, growing their Ball Service Group by leaps and bounds.

We also focus on community members who believe continued health in our ecosystem depends on investing in the right educational tools to prepare leaders for the business of the future. Mike Lazaridis has put a great deal of money where his ideas are, donating an astonishing \$20 million to Laurier. Exchange obtained an exclusive interview with Lazaridis.

“Healthy” can also mean health of the body, mind and soul – and in this issue, you will learn of a regional initiative that fosters health in the workplace. Project Health also honours workplaces that invest in keeping their employees healthy and well – and we report on the 2015 Award recipients.

As someone with a great interest in the arts, I know that a healthy community needs a healthy arts component, and I enjoyed interviewing and writing about local music-maker Rick Hutt, who won the Waterloo Region Arts Award for Music this year. Rick has made a difference for local musicians and music lovers for many decades.

A “healthy” lifestyle means taking time for pleasurable things... such as browsing through this very magazine. Enjoy!

X



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"A MAGNET FOR PEOPLE IN TECH"

We're no farm team. That was the gist of the message, stated softly but plainly by Steven Woods, Google Director in the Waterloo area, as he moderated a conversation with Silicon Valley veteran-entrepreneur, lecturer and author Steven Blank, at the 2015 Waterloo Innovation Summit in September.

The audience of 200-plus included entrepreneurs, academics, local and provincial politicians and other leaders of the private community in technology, advance-manufacturing, hospitality and an assortment of early stage startups.

Blank said that Silicon Valley was born in a military environment. There was war, and wars require innovative machines. That pretty much summed up the historical account on how Silicon Valley came to be. Blank said there was really "no understanding about how much money, in terms of billions of dollars, the US Government popped into Silicon Valley... Silicon Valley was a historical accident, literally out of the cold war, when... all research facilities in universities in the US did weapons research... And that built an ecosystem in microwaves and electronics that set up the valley for entrepreneurship."

Blank was very candid, and occasionally, self-contradictory, in the conversation with Woods. At times, he seemed to be acting as a recruiter for the Silicon Valley ecosystem. He asked, "What does Waterloo want to be?"

"If it's the farm team," he continued, "I think it's more than capable of that!" This was not the most popular concept of the event, and was quickly countered by Woods.

The key take-away was that Canadian institutions did not have the financial resources provided by the American war machine – with both negative and positive results. We've had to evolve very differently.

Playing devil's advocate, Blank asked, "What is the non-military equivalent?" His answer? "It's having this co-op culture, which I think is unique and incredibly successful."

Here, Blank was on more comfortable ground. The promotional material for the summit had stated that Waterloo has a growth index "ahead of New York, Los Angeles and Singapore."

Blank explored the reputation of Waterloo: "I've been in Silicon Valley for now more than 40 years... but Waterloo is this mythical place, with this magical stuff coming out of the universities... It's just one miracle after another, out of a place that had no reason to exist – at least from where we stand – and yet you guys kept hitting it out of the park."

The September innovation report card from the Conference Board of Canada puts Ontario fifth among all jurisdictions, ahead of all other Canadian provinces, and above such countries as Switzerland and The Netherlands.

"When I think of things that make Waterloo great, when I think of the playbook, I'm thinking more of the engineering thing," said Blank. He suggested that we should want "to be a magnet for people in tech."

He took a hard look at the challenge of recruiting talent, noting that there is a significant difference between "a jobs program for those who already live here versus trying to attract people to come here."

Perhaps tongue in cheek, he warned that if the local political leaders believe there is a great jobs program in place, "that's usually the death right there of the ecosystem."

And despite the immediacy and urgency of the high tech world, Blank warned that developing an ecosystem is not an overnight accomplishment. "Stuff doesn't happen in an ecosystem in two years, it might be a decade or two."

Blank wears his passion on his sleeve, and he reached rant level when he told the audience, "Start-ups are not run by engineers, they're not run by MBAs – Start-ups are run by artists, that is, talented artists. They might have been engineers, they might have been MBAs, but if they're still engineers and MBAs, then you've got the wrong people and you're funding the wrong things."

He said this is essential, because artists, sculptors, painters or composers, "see things, hear things, that other people don't... the composer, they already hear the symphony."

And to do that, Blank stated, "You're not going to learn about becoming an entrepreneur by being in the classroom, you're going to learn by getting out of the classroom, getting your hands on."

At the point when Woods insisted that no one in Waterloo region is "thinking about becoming a farm team," Blank made it clear his suggestion was intended



Steve Blank listens to Steve Woods at the 2015 Waterloo Innovation Summit

to inspire his audience to the next level. "I'm a huge fan of this region, it's just... where do you want to take it? Just think, you're this close to hacking the financial part, and figuring it out that collaboration is good, greed is better. This place is probably more than capable, probably any other ecosystem in the world, of hitting it out of the park ... and yet it hasn't. People should be unsatisfied with politicians, all the way down. It's not the people here in this building, they are not only unsatisfied, they're also helping to make the difference ... I'm just stunned by government and regions, people who have the ability to write big cheques, but just aren't writing the large cheques."

Blank summed it up: "Destiny is in your own hands." And he issued a call to action to those aggressive enough to help build Waterloo to its greatest: "I would hack the system, I would figure out how to hack the system." – Jon Rohr



Dr. Samantha Nutt gave a funny but true discourse on life and how to get around being told what to do

The 2015 Inspiring Women event, sponsored by the Greater Kitchener-Waterloo Chamber of Commerce, presented an impressive roster of platform and session speakers. It's the largest event in the area designed to celebrate women in business, entrepreneurship and corporate leadership. Keynote speaker was Dr. Samantha Nutt, Founder and Executive Director of War Child. She had a pointed message for her audience of women business leaders: "Too many of us waste too many years of our lives doubting ourselves and doubting our experience... We can lead, as long as we are prepared to challenge the complacency," and she called her listeners to action: "Let us be mercilessly unapologetic about being uncompromising." Suzan Snaggs-Wilson presented one of the event's Professional Development Breakout Sessions. She is the community banking manager for Waterloo for Scotiabank, and also has her own company, Snaggs Success. "I work off a principle that I've created, called 'work-life harmony'... We are the conductors of our own symphony, and so we need to know, when we're conducting, who to bring in to the symphony... I'm not afraid to reach out to people and get the resources that I need to be successful as a leader."



LOVE THE MUSIC, LOVE THE MUSICIANS

Rick Hutt sits in his control room at Cedartree Recording Studio, and reflects on his career in music. It takes a while – he's been making music and working with other musicians for about 50 years.

It's a stellar career that was recognized earlier this year, when Hutt received the Waterloo Region Arts Award for music – "a wonderful thing for me," he says.

A native of Palmerston, Hutt started playing in bands when he was 15 years old, and his career as a band musician included six years with The Spott Farm, and stints with Glider and the Ian Thomas Band.

"I started producing records in the early 1970s," he recalls. He's still at it, recording artists, producing records, and contributing musically to the mix. But one thing, he says, has changed a bit. "I started, loving the music. Now, I love the people who make the music... they're interesting people."

Hutt has recorded Baden pianist Charlene Nafziger – both a solo recording and in group work. Nafziger, unaware of Hutt's self-analysis, told Exchange, "Rick has such a gentle way about him that makes him comfortable to be around, while at the same time encouraging and coaxing the best out of everyone who is fortunate enough to work with him. He cares about the artist as much as he cares about the music."

Cedartree was founded by Hutt and business partner Doug Biggs in 1980; Biggs moved to western Canada and Hutt moved the studio to Trussler Road, where it adjoins his home, in 2000.

Hutt says that the entire music business has changed dramatically in recent years – with both positive and negative consequences. There is much less money available for recordings; a record project will involve fewer people by far than a couple of decades ago. "I think," says Hutt, "that affects the outcome." And overall, he says, "there's been a very dramatic change in the profit margins for people making music."

But because of new technologies, a musician can produce a record, working with someone like Hutt, for much less money than it might have cost in days gone by. So for many emerging musicians, the downsizing of the music industry in fact has an upside. He believes the current environment promotes independence and "uniqueness"

He says, "I'm busier than I have ever been. The business has kind of adjusted itself."

He defines his contribution to a recording as "a collaboration. Collaboration in music is one thing that contributes significantly to the outcome. Every project I'm working on is a collaboration."

His work includes projects right across the recording industry – music, TV and film, advertising.

He sees his role as going well beyond producing the best possible recordings – he feels that he has some responsibility for the overall career of musicians he is working with. He won't do a record if it uses up all the musicians' available as-

BUSINESS MONITOR

sets, leaving them no plan to market the piece. He wants his musicians to have a career, not a recorded memory. "I like to think that I've had an impact that way. I have a number of clients where I've done seven or eight albums."

He's worked with some of the best-known names in Canadian music – three albums with The Northern Pikes, Tom Cochrane, David Foster, local country star Jamie Warren (a relationship that started in the 1980s), rising Guelph star Joni NehRita, for whom he just completed her debut recording, "a strong entry for her." Another highlight was doing the music for CTV's telecasts of the Summer Olympics.

NehRita became one in a long line of Rick Hutt fans. "I feel blessed that the stars aligned for me to work with Rick. He brings such a genuine love and appreciation of music and musicians that seems unfaded despite how long he's been in the business. His instincts, skill level and musicality are impeccable and come without ego, which is a bit rare in the music business. On top of all of that, he is a joy to be around whether we're working or not. Great story teller, listener, advisor, friend and mentor. My only regret is that we didn't meet sooner!"

Hutt's influence reaches well beyond recording artists – there are more than half a dozen recording studios in Waterloo Region, and while those are now technically competitors, in truth, most of them are run by people who got their training under Rick Hutt. And Hutt is proud of that, pointing to the great work being done by many of his protégés and colleagues, specifically naming Andrew Horrocks, and also acknowledging his early work with Juno winner John "Beetle" Bailey.

Hutt believes that his work is important. He argues that capturing a recording converts a moment into a permanent memory. He was impressed, recently, when a friend told him that the friend's favourite possessions were cassette recordings made by his father and grandfather, preserving their voices and their thoughts.

Hutt, himself, spent hours with his archives, preparing the materials to support his nomination for the Waterloo Region Arts Award. It was a meaningful experience, he says, "a kaleidoscope of memory."

Although Hutt is well aware that working in the arts is always a tenuous pursuit, with profits never matching effort, he loves his work, and he loves the music – and musicians. And he believes that musicians are actually getting better.

He cites Malcolm Gladwell's premise that it takes 10,000 hours of work to become an expert, and spins it a bit, suggesting that the internet has made it possible for musicians to access information and expertise at a much higher level than in the past – when a guitarist might slow down the record on the turntable to figure out the riffs. "The 10,000 hours spent today comes with more information."

Then he laughs, realizing that he has probably spent "40,000 or 50,000 hours" at his craft.

Hutt is glad to be based in Waterloo Region, because of the strong music scene here, bolstered by community festivals and entities such as The Jazz Room. He has recorded several jazz records this year, alone. "Music," he says, "is everywhere." – Paul Knowles

LAZARIDIS STEPS IN TO FILL EDUCATIONAL GAP

Mike Lazaridis believes there has been a gap in business education. In an exclusive interview with Exchange magazine publisher Jon Rohr, the creator of BlackBerry said, "There are a lot of places where we train technology students, engineers, mathematicians, computer scientists. We teach them business skills, an understanding of business. What we're trying to do here is, instill an understanding and respect for how powerful technology is, and how technology works. We believe that's going to be important, because sometimes we underestimate the power of technology and the special requirements of technology, things like software licensing, technology licensing, contracts, intellectual property protection and litigation. When you start thinking about how transformative the IT environment in business is, how can you make decisions about massive investments like that as a leader, as a senior manager, if you don't have the right appreciation for how technology works and how powerful technology can be both for your business, and for your competitors?"

Lazaridis was interviewed following the official ceremonies to name Wilfrid Laurier University's School of Business and Economics in honour of Lazaridis. The \$103 million, state-of-the-art facility has been branded the "Lazaridis School of



From left, Lazaridis School of Business and Economics Dean Micheál Kelly, Laurier Chancellor Michael Lee Chin, Mike Lazaridis, Charles Sousa – Ontario Minister of Finance, and Laurier President and Vice-Chancellor Dr. Max Blouw.

Business & Economics,” on the strength of a \$20 million donation from Lazaridis.

But while the celebration focused on the new facility – scheduled to open for classes in January – the sponsoring philanthropist was more interested in the outcomes. He wants business students to understand the complexities of doing business in the tech world: “That’s the kind of special understanding and skill and appreciation that we believe this institute will prepare business students for.”

The new institute is opening as part of the celebrations of the 50th anniversary of Laurier’s business and economics school. Primary funding came from Lazaridis, while the province of Ontario kicked in \$15 million.

The name “Lazaridis” is doing double duty, because part of the new school will be the Lazaridis Institute for the Management of Technology Enterprises, specifically focused on the areas of need identified by Mike Lazaridis, who is currently a founding partner in Quantum Valley Investments, a Waterloo-based fund that focuses on the commercialization of breakthrough technologies in quantum information science and which seeks to support Waterloo Region’s growing reputation as the “Quantum Valley.”

Micheál Kelly, dean of the Lazaridis School of Business & Economics, lauded Lazaridis at the announcement ceremony. “I can’t imagine a better name for a school of business and economics than the one that we are adding today. It’s a name that is recognized nationally and internationally; it’s a name that is associated with vision, innovation and excellence.”

“I chose to invest in Laurier because I thought that they were uniquely positioned to transform the way that technology business managers are trained and developed,” said Lazaridis. “I believe the Lazaridis Institute for the Management of Technology Enterprises will help Laurier produce exceptional tech-savvy business managers and leaders that Canadian technology companies need to grow and succeed globally.”

The Lazaridis School of Business & Economics is an innovative leader in immersive learning and leading-edge research. From their very first day on campus, students work in teams to tackle real-world challenges. Through Canada’s largest business-degree co-op program, students are immersed in the environments they will experience after graduation. Laurier students learn to think critically and are well-prepared to adapt successfully to a global world of ever-growing complexity.

Speaking at the official announcement, Lazaridis waxed philosophical: “There’s a well known but ancient saying that fortune favours the bold. But we can’t forget that there’s a more recent saying, that fortune favours the prepared mind.”

Lazaridis took his audience through the discussions that have led to his block-busting donation. “When [Laurier President] Max Blouw and Micheál Kelly first approached me about this opportunity, I was intrigued. I was impressed by their ambitious plans to build a new, \$100 million, state of the art teaching facility to house their highly successful school of business and economics. We had discussions about how advanced technology had become pervasive in almost every aspect of today’s business.

“Technology is not just accelerating product development and manufacturing, technology was transforming the very concept of what is a product or a service.

Not only was information technology indispensable as a foundation of business management and operation, information technology was completely transforming marketing and advertising. The web was disrupting established businesses’ distribution and sales channels.

“We talked about the vision for this region’s Quantum Valley, and the need to prepare for the next wave of industrial growth in Quantum computing, materials and sensors. We talked about the success of the region in starting new technology businesses, and the confidence and enthusiasm of our local entrepreneurs and angel investor network.

“We recognized the importance of success of our local tech incubators, and we wondered what it would take besides venture capital to help these new tech companies grow beyond the start-up phase.

“Through these discussions, we identified the need for specialized business programs, business programs that would specialize in teaching high-tech strategy, high tech management and high tech leadership to business students. Specialized programs that would tap the knowledge and experienced knowledge professionals to train the next generation of business students with the skills necessary to help start-ups succeed and grow to the medium and large size enterprises.

“We realized that we needed to prepare business students, managers and leaders with the skills necessary to better understand the vast potential of high technology. To appreciate how advanced technology and research development can help shape strategy, improve competitiveness, create new products, enhance innovation and productivity and open new markets.”

He added, “In short, we want to make sure that Ontario’s growing number of high tech businesses have access to the tech-savvy business managers and leaders who will be instrumental in their successful growth and competitiveness on a global scene.”

Lazaridis made it clear that he has a high level of confidence in the regional tech environment. “Here in Waterloo Region, we are beginning to see the fruits of decades of strategic investment in basic research, academic excellence, and high tech entrepreneurship. The success of local tech incubators such as Communitech, Accelerator Centre, Velocity, the Laurier Launch Pad, are starting more new companies than ever before, and these new companies are attracting large pools of venture capital. In just the past five years, nearly 2,000 technology start-ups were formed, 500 in the year 2014 alone, and they raised over \$650 million in investment.

“The Waterloo Region’s innovation and entrepreneurial groups run deep. Its academic excellence and research institutions are globally recognized. Its high tech industry continues to grow and change the world, creating jobs and prosperity for Ontario and Canada.

“I chose to invest in Laurier because I believe they are uniquely positioned to transform the way technology business managers are trained and developed. I believe the Lazaridis Institute for the Management of Technology Enterprises will help Laurier produce exceptional, tech-savvy business managers and leaders that Canadian technology will need, to grow and succeed globally.”

KITCHENER FIRM COMPLETES \$3 MILLION EXPANSION

A Kitchener custom metal fabrication company is expanding – in at least four ways. Ball Service Group has added space, capacity, staff – and market, as it invests \$3 million to create a facility to handle even larger projects than has been the norm for the company. A grant of \$200,000 toward that project was announced by Kitchener Centre MPP Daiene Vernile – the money comes from the province's South West Ontario Development Fund.

Mike Ball, who with his wife Mary, founded the company in 1987, says that Ball Service Group really got its start building large machinery for the original Cambridge Toyota Plant. They have expanded that relationship ever since, producing multi-tonne equipment for Toyota operations and businesses in its Tier Two supply chain located in the United States, Mexico, and South America.

Another significant market for Ball Service Group is the oil and gas industry. The giant equipment they produce does not primarily go to Canadian markets, but to the US – places like Virginia, Kentucky, and Detroit – so the current issues around Canada's oil industry have not lessened the call for their product.

The sheer size of their products – the new facility includes a 35 metric tonne crane (their largest has been 15 tonnes) – means that they are somewhat different from companies usually described as “advanced manufacturing,” but they do fit the definition. Mike Ball told Exchange, “We try to automate everything we can, all the different processes, for accuracy and productivity. In that sense, we are more advanced than some of our competitors are.”

Their original contact with Toyota was actually with the Japanese trading company that built the Toyota plants on behalf of the automobile giant. But, says Ball, “When the plant was up and running, Toyota became our customer as well.”

Other companies followed Toyota's lead; one of the factors driving Ball's new investment is the impossibility of keeping up with demand. Says Mike Ball, “We have customers who wanted to give us more, but we turned down a lot of work, because of limitations. As much as we wrote, we turned down this summer.”

He says the orders keep coming, because “We have a great reputation, and a very loyal, skilled work force. We could buy equipment anywhere, but [the key is] our people... we're fortunate.”

The company now has 30 employees, but Ball says that they also provide business to a significant number of other local companies. “We use a lot of local contractors. At any given time we have six or seven machine shops that are making parts for us. We prefer to do the heavy fabrication and we send them out for final machining, and then bring them home and we blast them, paint them, [carry



Joanie Nemes, HR Manager, Mary Ball, Michael Ball, President, Jeff Benham, General Manager

out] the assembly process, the wiring. They'll be tested for three or four days,” and then crated (in certified bug-free crates!) and shipped.

One thing they won't do is make promises they can't keep. If they can't meet a client's deadline, they will say so, according to General Manager Jeff Benham. “Customers do appreciate that we're not going to tell them we can do something that we won't deliver on time. We run by a production schedule in our shop, to make sure we can put our work out at an appropriate date. Customers like that.”

Joanie Nemes, Ball H.R. manager, says that the sheer size of the equipment they are both using and creating make for some specific health and safety challenges. That, she says, “is an ongoing process, of utmost importance for our staff. It starts right at the beginning, in our orientation program.”

The future is bright, says Mike Ball. “There are some long-range programs we're involved in. “For instance, “We're in the first year of a two-year program for oil and gas industry.... Our customers are excited about helping us to grow our business.”



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EMPLOYEE WELLNESS: PROACTIVE AND HOLISTIC

For many individuals and organizations the importance of focusing on proactive and holistic approaches to healthy environments isn't well understood.

A recent HR Reporter article included some interesting statistics from a Conference Board of Canada study, related to the cost of employee absenteeism.

Although absenteeism is generally tracked and handled by Human Resources, all levels of an organization should pay attention to it, especially since the rates of absenteeism and the impacts on organizations will likely continue to increase based on the aging work-

• *The average Canadian worker was absent the equivalent of almost two full work weeks in 2011.*

• *The direct annual cost of absenteeism averages 2.4% of gross annual payroll.*

• *These absences cost the Canadian economy an estimated \$16.6 billion in 2012.*

• *Only 15% of organizations measured the direct cost of absenteeism.*

force. Organizations can try to address these issues by tracking absences, but since close to 75% of employee absences are due to employee illness or disability, a more effective strategy is to proactively address employee health and wellness.

Dealing with employees' health is an organization's competitive advantage as the payoff is significant: greater productivity, lower absenteeism and presenteeism, and reduced healthcare costs. Workplace health and wellness initiatives provide value to organizations by keeping employees healthy and engaged.

Wellness Programs: Where to start – The key is analyzing information from a variety of readily available sources that are specific to your employees and then using this information to roll out relevant and impactful programs.

• Reviewing data: health risk assessments are one way of collecting data about health issues. Most group benefit providers make these assessments available to employees online and will provide aggregate level data to the organization. It's also important to consider data and analytics from your group benefits, retirement, employee assistance and disability programs, and workers' compensation reporting. Integrated data can be used to point to strategic wellness decisions about preventable health conditions where risk is present in a population; to promote health and healthy behaviours; and to engage multiple generations in a workplace. Utilizing statistics specific to your employees will also help you target programs that are relevant and impactful for your team.

• Survey employees: just sending out the survey can be a morale booster, as it shows the employees you value their input; however, there must be a willingness to use this information so that employees believe you're listening to their feedback.

• Establish a Wellness Committee: the committee does the research, puts together a strategy, and talks to their colleagues about it. It's important to have a good cross-representation of your employee group on your committee. You may also want to consider including outside service providers or consultants who may bring added perspective to the discussions. Committees are a way to co-create wellness programs, and a strategy to boost participation and hear valuable feedback about the program.

• Have a communication strategy: to effectively engage employees around wellness, it's essential to communicate wellness program initiatives, goals and incentives available for employees who participate. Create messaging that's clear, consistent and widely circulated. Management-driven communication around wellness is also invaluable – employees are more likely to participate if they can see that the organization's commitment to wellness starts at the top.

• Measure the return on your investment: the costs saved in terms of employee health resulting from effective wellness programs are often greater than the cost of the programs themselves, meaning that wellness initiatives can pay for themselves within the first few years of implementation. Knowing the return on your investment allows an organization to determine the financial benefits of the investments and can help sustain health and wellness programs in the face of competing organizational priorities.

An effective wellness strategy links existing internal and external health resources, maximizing the program's potential and outcomes, and incorporating the existing benefits program into the approach.

Having a holistic approach to your program can improve the overall health and wellness of your employees, including their physical, mental and financial well-being.

The movement toward a more holistic view of wellness echoes a similar movement we've seen in human capital management – total compensation. Helping employees see offerings or the benefits of offerings as a total picture also ensures employees have a grasp on what's available to them and the value in what's provided.

Teresa Norris-Lee is Vice President, Group Benefits & Retirement with Cowan Insurance Group. She has over 25 years of experience in the group insurance industry both on the consulting side and with a major Canadian life insurance company.



Teresa Norris-Lee

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TOP TEN LEGAL CONSIDERATIONS FOR SUCCESSFUL ECONOMIC DEVELOPMENT

Local economic development (LED), foreign direct investment (FDI) and workforce development (WD) all have unique legal implications and practices. Each generates a firm foundation of not only growth and prosperity but also a need to navigate the broad legal framework that impacts a city's need to grow.

Miller Thomson LLP, working with Kadie Ward, from Build Strong Cities, provides some insight on the Top 10 legal considerations which often need to be considered in LED, FDI, and WD.

1) Real Estate:

Real estate law covers rights to possess, use, and enjoy land. This includes the capacity to hold interests in real property, and especially permissible interests in the real property. Real estate goes hand in hand with LED and FDI as we often work with our clients to find property. Real estate law and application will vary by the type of business your client is looking to establish or expand. As such, it's essential to consider all relevant provincial laws and regulations, as well as all relevant municipal by-laws affecting different types of businesses, and the following key topics: Commercial Leasing; Commercial Real Estate, including purchases, sales and refinancings; Condominium Development and Management; Land Development; Landlord and Tenant Law; Environmental Law; Residential Real Estate. Each of these holds special transactions and legal duties which can potentially delay the setup of a business.

2) Labour and Employment:

Workforce Development has long been a focus for LED and FDI success. To effectively manage WD, Labour and Employment law must be considered. This body of law governs the employer-employee relationship. Companies must be cognisant of various provincial and federal statutes which address such issues as: the right to organize and negotiate collective bargaining agreements; the minimum standards that employees are entitled for wages, hours of work, vacation, etc.; pay equity; protection from discrimination; and, all aspects of workplace safety. In addition, employers should consider such issues as employment contracts; appropriate policy development and implementation; and, the implication of applicable employment legislation on sale of businesses and related employer issues. The law governing the employment relationship is complex and varies by province. As an LED professional your Workforce Development department should be able to help FDI or expanding businesses connect with the appropriate service provider to navigate provincial and national employment regulations.

3) Immigration:

Part of a business' workforce development strategy might include hiring of temporary foreign workers and/or relocating of personnel from an organization's offices abroad. In such situations, it's essential to consider the area of immigration law. When seeking to recruit and/or hire workers to work in Canada who are not Canadian citizens or Permanent Residents, there are numerous categories under which these individuals may apply to come to Canada. These can be classified as follows:

Applications for Temporary Residence:

Tourist and business visitor visas (including those coming to Canada to provide intra-company training and to perform contracted after-sales services); Study Permits; Work Permits. Work Permits also come in numerous categories. These include, but are not restricted to: Intracompany Transferees; Work Permits based upon treaties – such as NAFTA or GATS; Caregiver Program (formerly, Live-in Caregiver Program); Work Permits based upon Labour Market Impact Assessments (LMIA) (formerly, Labour Market Opinions).

Applications for Permanent Residence:

Economic Class Programs: Federal Skilled Worker Program (subject to Express Entry system); Canadian Experience Class Program (subject to Express Entry system); Federal Skilled Trades Program (subject to Express Entry system); Provincial Nomination Programs (PNP) (may be under Express Entry system or independent of it); Investor/Entrepreneur programs (may be found at the Federal or Provincial levels); Other Areas of immigration law which may need to be considered include: Citizenship, Inadmissibility issues (Criminal Rehabilitation and Temporary Resident Permits).

4) Intellectual Property (IP):

Growth occurs naturally through birth rates, or through migration. As companies expand into new markets they ought to consider how to protect their new venture. For instance, an FDI file you are working on might bring an investment that imports a new kind of technology or process into your country. If this is the case, the company you are working with should look to protect itself from potential infringement, counterfeiting and loss of its market value. Various forms of IP protection including patents, trademarks, copyright, industrial designs, trade secrets, and confidential information might be relevant to your FDI or LED client, and an early consultation to formulate an effective IP strategy is advisable.

5) Mergers and Acquisitions:

As we know, company mergers and acquisitions are a common source of business growth and LED. Legal advice is essential for both the buyer(s) and seller(s) of a business, whether it's privately or publicly held, in light of the vast and complex regulatory and tax issues involved in a M&A transaction. By way of a broad definition, M&A refers to the consolidation of companies. A merger is a combination of two companies out of which a new company is formed, while an acquisition involves the purchase by one company of another with no new company being formed as a result. In general, mergers and acquisitions of public companies are regulated under Canadian securities law. Procedural and substantive fairness requirements must be satisfied for many transactions, including those that commonly occur between a Canadian public company and its principal shareholders. These transactions include bids by insiders, issuer bids, going-private and business combination transactions and a broad range of related party transactions. Where the acquirer of an existing Canadian business is a foreign investor, there are additional regulatory requirements to be met as set out under the Investment Canada Act (ICA). In this case, the acquisition of control of the business is either "notifiable", which requires the filing of a notice of investment,

or reviewable, which requires the filing of an Application for Review. For a company considering either a merger or acquisition, there is a host of areas to be navigated, including: investment review (FDI); Competition Act issues; tax implications; financing; pension and benefits; real estate; business immigration; intellectual property; and employment and labour.

Mergers and acquisitions are a double-edged sword for LED and FDI, but can be leveraged competitively if your municipality is on the receiving end of the growth.

6) Tariffs and Taxation:

Taxation is a governmental assessment, levy or charge upon income, profits, consumption, property value, transfers of property and estates of the deceased.

In addition, duties may also be imposed on imports from foreign countries. Taxes may be viewed as including all contributions imposed by the government upon individuals for the service of the state. When a company is considering taxation, the company should consider how tax will impact each of the following business activities and transactions: Mergers and Acquisitions (M&A) transactions and financings, reorganizations of public and private companies, borrowing and lending activities, investment activities of funds and other entities (including real estate investment trusts (REITs) and payroll and executive compensation issues including stock option and benefit plans. Each of these fields is affected by taxation law.

7) Franchising:

Franchising remains the expansion vehicle of choice for many brands seeking to expand in Canada.

Economic growth is often the result of the establishment of well-established foreign manufacturers, suppliers, distributors and franchisors of goods and services which are seeking to expand into new markets. Franchising has emerged as a very capital-efficient method of expanding and growing a brand in a foreign market. In its simplest terms, a franchise is a license from the owner of a trademark and a system of selling or marketing specific goods and services which permit an independent third party to sell or distribute such products and services under that trademark and using the franchisor's proprietary system. Franchisees are required to conduct their business and sell designated products and services in accordance with methods and procedures prescribed by the franchisor. The franchisor undertakes to assist the franchisee through training, technical support, advertising, promotion, and general business and operational advice. Many Canadian provinces, including Ontario, have enacted legislation which requires franchisors to provide pre-sale disclosure to prospective franchisees. Notwithstanding this compliance burden, franchising remains the expansion vehicle of choice for many brands seeking to expand in Canada.

8) Financial Services:

Whether a company is newly incorporated, or previously existing but establishing a new or additional location for its business, the company will require an array of banking and financial services in the new location, and will need to determine which bank or financial institution would best serve its needs. Financial institutions may include Canadian or foreign banks; other commercial lenders such as trust companies, insurance companies, pension funds, credit unions or lease finance companies; government loan agencies; and governments. All of these will be regulated at either a federal or provincial level. Services will include deposit taking facilities, cheque writing facilities, loan facilities (whether operating facilities or term facilities), letters of credit facilities, electronic funds transfer facilities and a variety of other finance-related functions. Not all financial institutions will be able to offer all financial services, similar financial services may be offered by different financial institutions upon substantially different terms, not all financial institutions will offer expertise in the particular business sector of the company concerned, and not all financial institutions will be able to offer the national or international services that may be required by the company. A law firm with expertise and experience in business law and business finance will be able to provide expert guidance to a company on the appropriate choice of financial institution and financial services.

9) NGOs, Non-Profit Organizations and Charitable status:

Nongovernment organizations (NGOs) include non-profit organizations and registered charities.

Economic development often includes working with non-government organizations (NGOs), including non-profit organizations and registered charities. In fact, your organization may be set up as one such entity, or you may seek to establish an arms-length NGO to deliver certain LED activities. If you are looking to establish a not-for-profit LED organization to support community growth, it's



Miller Thomson lawyer's Andy Roth, David Schnurr and Jean Leonard

essential to look for a law firm that can help establish the organization, obtain charitable registration for the organization where necessary, and advise on the tax and regulatory rules that apply. These rules are complex and unique to the non-profit/ NGO context and require a firm with specialized expertise.

10) Information Communication Technology:

Every company or organization these days in every industry sector uses some form of Information & Communications Technology (ICT) in their business, whether it be IT infrastructure, software, email, websites, databases, computer hardware, mobile devices, point-of-sale systems (e.g. for acceptance of payment cards or apps, and providing customer receipts), inventory and delivery networks, telecommunications, etc. Some companies also develop and sell ICT products and services as an important part of their revenue stream. To be successful in Canada, requires an understanding of the types of ICT contracts that a business or organization will need and also the ICT regulations that a business or organization will need to comply with. Consulting with a technology lawyer to minimize one's legal and business risks is very important if one is doing or involved with any of the following:

- a. Developing, buying, using, storing or selling of ICT assets.
- b. Setting up of online businesses and e-commerce.
- c. Hiring ICT developers or outsourced service providers (also known as procurement or sourcing).
- d. Entering into wireless, Internet and phone communications require connectivity agreements.
- e. Doing online advertising and data analytics.
- f. Sending out emails, software updates or other electronic communications (Canada's Anti-Spam Law CASL).
- g. Collecting, using, disclosing or cross-border transfer of personal information about contacts, customers and employees.
- h. Disputes involving domain names, failed development agreements, breached ICT contracts or allegations of intellectual property infringement.
- i. Doing business with certain regulated entities such as financial institutions, payment processors and healthcare businesses.
- j. Businesses and organizations also need to have in place, proper employee technology usage, CASL and IT policies and procedures.

Successful LED helps manage and mitigate business constraints so our community can prosper. A basic understanding of the enabling legal and regulatory environment can help you do that. (Source Miller Thomson LLP. Adapted from a presentation by Kadie Ward, Building Strong Cities.)

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Helen Jowett

TRANSFORMATIONAL TIMES

Regional rookie called on to head economic development committee

by Jon Rohr and Paul Knowles

Helen Jowett has been a member of Waterloo Regional Council for one year. But despite being one of the rookies on council, this Cambridge representative, who admits that “it was a little intimidating at first,” has been named chair of a committee that may turn out to be the most important committee of council – the Economic Development and Promotion Committee.

This is not a new committee – there has been an economic development committee for decades. But it is a committee with a brand new, and very significant, mandate – to be what regional chair Ken Seiling calls “the formal interface between the Waterloo Regional Economic Development Corporation and regional council.”

The WREDC is the newly formed corporation, backed by all seven area municipalities and the Region – which will now be the point organization for economic development across the Region. It replaces Canada’s Technology Triangle, taking over CTT’s foreign investment mandate and expanding it significantly.

And Jowett is heading the committee that will liaise between the WREDC and the Region.

While she may be a newbie on Regional Council, she brings an impressive resumé to her new responsibilities. Seiling told Exchange, “Helen comes with a business background and an interest in business development and economic development... I think she’s a real natural.”

She’s not only had an interest in business development – Jowett has taken leadership in a number of area organizations. A Certified Human Resources Professional and Mediator and holder of an M.B.A., she is founder and owner of McDonald-Green, an HR consulting firm. She has been Chair of the Cambridge Chamber of Commerce, Chair of Canada’s Technology Triangle, Chair of Cambridge Memorial Hospital Foundation, Chair of Junior Achievement, Vice Chair of Conestoga College, a member of the Boards of Wilfrid Laurier University, the Barnraisers Council, and Sunrise Rotary.

Jowett says, “Our community is very open and very much

allows people to be engaged. You can get involved in almost anything you want to.... Whenever anybody asked me to sit on a board, if I had the time, I’d always say, ‘Yeah, why not?’”

She was usually recruited because of her perceived skill set related to human resources, but Jowett can’t be pigeon-holed. “They’d bring me on board because of my HR focus, but then I would almost always gravitate toward the leadership role. I don’t know how that happened, or why ... probably just because I said yes!”

“Helen comes with a business background and an interest in business development and economic development... I think she’s a real natural.”

And in the period leading up to the most recent municipal elections, which were held in October 2014, she said “yes” again – this time to people who were urging her to run for one of the Regional

Council seats from Cambridge.

She says she has always been interested in politics, but did not expect to succeed in her initial run for office. “I was surprised I won the first time. I thought I would have to run again. I made the decision to run based on the fact that I had been sitting around all these tables from a business angle, for a very long time, and I thought, maybe some of what I have learned I can actually bring to the table from a different perspective.”

For any newcomer to municipal office, there is a sharp learning curve, and Jowett immersed herself in her new job – while distancing herself from her business, now run on a day to day basis by Toni Veiledal, McDonald-Green’s Director, Corporate Development.

Jowett says that she understands why some of the practices at the Region seem arcane: “There are so many historical protocols that have to be maintained even for things to be legal. The motions have to be presented properly, you have to act at the pleasure of whoever is chairing the meeting... The systems and protocols are set up for respectful debate. There are a lot of rules, but I think it works really well.”

But while that kind of tradition is important, Jowett celebrates change, as well. “On this council, there are a lot of

new people. I think we're embracing where politics is going, I think we're really good at open debate and still being respectful; not having that historical, 'I don't like you because you didn't vote for what I wanted.'"

One significant change involves the role of the committee she chairs – Economic Development and Promotion. Ken Seiling says that the committee's mandate has changed almost entirely. "We've had an economic development committee for many years... It didn't do a lot, it dealt mainly with grants to organizations... It wasn't a big, active committee, it didn't really have a strong mandate."

But with the formation of the WREDC – which has been approved by all municipalities – "That committee will now be the formal interface between the regional corporation and regional council." Seiling suggests that the normal process will see the WREDC interact with Jowett's committee; the committee would then make recommendations to council, although WREDC is also committed to direct reports to all regional municipalities.

Seiling says the new Corporation is the right thing at the right time. "Council is quite keen on what's happening. For years we have felt there needed to be a stronger central

role for economic development. This most current round is more of a reflection on where regional council felt it should go but really wasn't in a position to force the issue. I think more recently there is this willingness to work together to create a stronger body, and regional council certainly have been very strongly behind it."

That "willingness to work together" is one of the things that Jowett finds encouraging and hopeful about the current

Regional Council. She told Exchange, "I'm excited about this council because of the way we work together," and as a representative from Cambridge, she underlines the new spirit of cooperation across the face of the region. "This anxiety between Cambridge and the Region, it's not like it was. It's actually quite amazing. I won't tolerate anybody making me part of a conflict. I'm a mediator by trade, and so I try to bring people together all the time."

Time for a change

Jowett was chair of Canada's Technology Triangle until she stepped aside to run for Regional Council, so you might think she would be ambivalent about the development that has phased out the CTT and introduced WREDC.

"I think we're embracing where politics is going,
I think we're really good at open debate
and still being respectful."

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Not at all.

"I do believe this is huge for our community," she says. "We are doing the next iteration of what has to happen. It is evolving into a broader mandate."

Jowett has a lot of positive things to say about the CTT – although she was also an agent of change with that organization. She says, "I have been on the CTT board for 10 or 12 years. They asked me to chair it a couple of times and I said I wouldn't chair it unless I could overhaul it because I didn't think we were running it as effectively or as efficiently as I thought we could."

"We were doing some seriously important work and that's when they said 'Okay, do what you want'. So I changed the staff over to business development people."

She says that the changes brought positive results – and ironically, the best of those results may come

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Helen Jowett in her Cambridge office: "My own role will be much different."

under the new organization. "The sales cycle for CTT is long, and unfortunately, all of that hard work that was put in then is going to be realized now. I hope that everybody realizes that there's going to be this new organization that is going to hit the

ground really running hard because of the work that's just going to come to fruition because of all of that hard, focused activity."

The new WREDC board of directors is a skills-based board, and, unlike the CTT, there is no direct representation

by governmental representatives, either elected or administrative.

Jowett sees that as a good thing – although it is also the reason her

"That committee will now be the formal interface between the regional corporation and regional council."

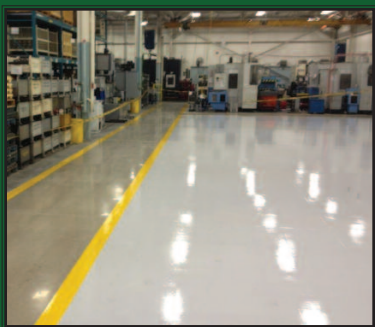
newly mandated committee is essential. "We will be there to steward the tax dollars. To make sure we are getting a return on investment. To look at the metrics and say, are the activities netting the community the result they deserve from it. That's going to be our role."

She argues that government should have a supportive but not necessarily a leading role in economic development. She told Exchange that in the CTT years, "There was a continual



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tension between the administrators, the CAOs, and business, because we see things differently. The CAOs were always looking for metrics, and we were always looking for less interference. Because business owners, when they come here, don't want to talk to politicians, until they need policy or a zoning change." She repeats her statement for emphasis: "They don't want to talk to politicians."

She finds it a bit transformational to now be part of the government side. "I know now, here, that my own role will be much different. What I do want to care take is making sure that we do a good job of this. That means many different things. Like taking the best of what we learned at CTT and keeping it. Like knowing that our mandate must be bigger and stronger and competitive."

Jowett has brought a motion to

"Business owners, when they come here, don't want to talk to politicians, until they need policy or a zoning change. They don't want to talk to politicians."

council that asks staff to investigate granting "delegated planning authority" to each municipality within the region. This would give each city and township the right to grant approvals to business investments without a second step of going through the region. At present, Kitchener has that authority while the other six municipalities do not. In her motion, Jowett said, "Success of our newly formed Waterloo Region Economic Development Corporation will realize greater potential, if we are able to streamline planning processes even further... I believe that delegated authority can speed the process if it is implemented properly and the municipalities respect the requirements of it."

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Jowett believes "Waterloo Region is ahead of the curve."

Part-time full-time job

Jowett is excited about her new role, and about the potential that has been created by the new WREDC. But she stresses that chairing the com-

mittee is just one part of her job – a position that is technically part-time. She laughs: "They call them part-time councillor gigs. I make \$41,637 a year, I think. But the reality is, if I was going to get into it, I was going to give it my

all.

"I came at this with a learning mind. I'm pro-development because of CTT, but I also know we have a lot

"There's so much investment from the region and from the municipalities. We're investing so heavily that everyone's going to have to realize that this is serious. Either they're part of the problem or they're part of the solution."

of sensitive lands in the region, so I put myself on GRCA because I wanted to balance that side of me.

"I want to be able to steward that vote with the most integrity I can. So I come in here, when it's council week, and I read for a day by myself. I don't

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want to be ill-prepared. Sometimes there are 300-400 pages."

Jowett embraces the challenges. "My fiduciary duty here is to look into as much as I possible can. I look for argumentation. I intentionally talk to people who have an opposite perspective to me, because I think that's where the learning happens."

Community booster

Jowett is a woman in love with her community. She recalls a session on economic development she attended at an Association of Municipal Officials conference: "Basically, they kept touting what Waterloo Region has done, and what we are about to do. We're ahead. That's what I am most proud of. We're finding out that Waterloo Region is ahead of the curve on so many things. We're doing pretty good here."

And, she believes, we can do even better.

"As a region, we have so much more to capitalize on, together, when you take our capital assets, and really look at them, if we can really position them... This community is so collaborative.

"And we had to learn how to be collaborative because of how fractured our communities are. We had to find the ways to be honest about when it's good to collaborate, and

when it's good to mind our own agenda. And I talk openly about that all the time. You have to know the difference and be open to that. I think this community has over time learned that."

More strategic

Jowett asks, "What are we going to do better with this new organization? I think we will be more strategic. I think going to market as a region is going to do us much more than going to market individually. I think it is time for that."

She adds, "There's so much investment from the region and from the municipalities. We're investing so heavily that everyone's going to have to realize that this is serious. Either they're part of the problem or they're part of the solution..."

"There's a search underway for a CEO – somebody who can manage multiple stakeholders, somebody who understands economic development, and obviously somebody who understands foreign direct investment, so this leader is going to have a broader mandate that CTT has had..."

"This is a much bigger budget, a much bigger mandate, and there are more people engaged and you have some real good international leadership around the new board table."

"I do believe we are at a transformational time."

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Professor Costas Tzoganakis, of the University of Waterloo, Daiene Vernile, MPP (Kitchener Centre), Sam Vlsaisouk, CEO of Tyromer.

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Tobias Lütke, CEO of Shopify, is interviewed by Michael Litt - Vidyard on the day of the expansion announcement.

"Each year more than 300 million scrap tires are generated in North America. During the average life of a tire, only 20 per cent of the rubber is used, leaving a staggering 10 billion pounds of scrap tires," said **Sam Visaisouk**, CEO, Tyromer Inc. "With Tyromer-TDP, there is now a socially responsible and environmentally sustainable solution to the global management of scrap tires."

THE MUCH-DEBATED TRANS-PACIFIC PARTNERSHIP trade agreement appeared to be a done deal, and yet still a bit of a mystery, at the time of the October 19 federal election. Although Canada – along with eleven other countries – had signed onto the deal in principle, the text of the pact was not to be available until after the election. The TPP agreement has inspired strong reaction from many quarters, like manufacturing (mixed response), agriculture (negative response from segments with quota systems, positive from eager exporters), and raw materials (largely positive).

SHOPIFY, DISTILLERY LABS AND TD LABS are all locating and expanding in Waterloo. Shopify's new Waterloo location, to be occupied in April 2016, will enable a tenfold increase in its local footprint, which currently counts 30 employees at a sales lab that opened about a year ago in the Lang Tannery,

share ideas about growth and development. Founders **Josh Hillis** and **Craig James** have cited the King Street location as ideal for entrepreneurs looking to pair technology with restaurants, shopping and cultural experiences.

TD Labs, a technology innovation centre launched by TD Bank Group, is located at 55 Columbia St., E..

THE UNIVERSITY OF WATERLOO NAMED A PROFESSOR and longtime advocate for increased female participation in her field as its first-ever director of Women in Computer Science. In her new role, **Joanne Atlee** will continue to strive to help women

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Joanne Atlee

and viewpoints to the table,” said Atlee. “Half the battle is encouraging girls to learn about computer science when they’re young, and the other half is supporting them once they arrive at university.”

ZHOU WANG, A PROFESSOR OF ELECTRICAL and computer engineering at **University of Waterloo**, has won an **Engineering Emmy Award** for developing computational models that accurately and consistently predict how people view image and video quality.

CLEARPATH ROBOTICS, THE WATERLOO REGION company that grabbed headlines last summer by refusing to make killer robots, has made two significant announcements: its first self-driving robot for industry, named **OTTO**, and strategic partnership with **General Electric**.

Clearpath moved into the industrial market in March after it raised a C\$14-million Series A investment round, and

feel comfortable and confident in the field largely dominated by men. She is an expert in model-based software engineering and a professor in the **David R. Cheriton School of Computer Science** at Waterloo.

According to the Bureau of Labor Statistics in the U.S., women filled 26 per cent of professional computing

positions in that country in 2014, and the number in Canada is likely similar. With added outreach efforts, Waterloo has seen a gradual increase in female enrolment in that field of study, which now sits at about 25 per cent.

“The participation of women in computer science is low globally, and that is bad for the field because diversity brings a greater variety of ideas

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OTTO is its first major achievement in this space. OTTO can transport a 3,300-lb. load around a factory floor at 4.5 mph, finding a path optimized for efficiency while intelligently avoiding collisions. Using the same underlying technology as the **Google** self-driving car, OTTO was designed to help factories and warehouses boost efficiency, stay responsive and reconfigure on the fly. For Clearpath, meeting this ambitious goal meant teaming up with American technology giant GE.

A NEW, 85,000 SQUARE FOOT OFFICE BUILDING in the heart of Waterloo is designed to meet several pressing needs. The project, at 85 Willis Way – part of the **Shops at Waterloo Town Square** complex – will include ground floor retail space, two floors for offices, and an 87-unit underground parking garage – the first underground parking in the area.

The new building will provide more

than 60,000 square feet of new office space. Currently, the office space vacancy rate in Waterloo Core is only 3.6%. The new 85 Willis Way project is designed to meet that need – and also to provide additional opportunities for retail tenants seeking street-front accommodations. The new project is being carried out by **PrimusPM** and **Tricap Properties**, ownership partners in The Shops at Waterloo Town Square. The developers noted that construction of 85 Willis Way will cause some temporary disruption, but construction has been timed to coincide with the adjacent work on the Light Rail Transit project.

Potential clients of the new building are already queuing up for facilities, according to **Mike Polzl**, President of **Cushman & Wakefield Waterloo Region**, representing the project. Polzl says, “Uptown Waterloo is the healthiest, strongest urban market in the entire Region of Waterloo and Guelph.”



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THOMSON REUTERS, a leading source of intelligent information for businesses and professionals, has established **Thomson Reuters Labs - Waterloo Region**. The Lab will see Thomson Reuters engage with the region's innovation ecosystem and its startup community, world-class university and culture of industry collaboration. **X**

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CONTINUED FROM PAGE 30

Sangster asks, "How can the employer put things in place for people who have adopted new behaviour?"

And finally, Project Health encourages a strategy of "policy development", where the employer creates and implements a consistent set of policies that encourage, support and sustain the elements of a healthy workplace.

These are the four areas in which applicants to the Waterloo Region Healthy Workplace Awards program are judged. These awards were first presented in 2010; by 2014, regional organizers recognized that companies were exceeding their original award-winning levels, so a new, superior category was created.

Until 2014, the top award was Gold; starting last year, companies can earn a Platinum Award. This year, 20 awards were presented on October 29, significantly more than in 2014.

Platinum Awards went to Boehmer Box LP, Canada Revenue Agency; Christie Digital Systems Canada; Corporate Benefit Analysts Inc.; Economical Insurance; Equitable Life of Canada; KEI – Kuntz Electroplating; Kitchener-Wilmot Hydro; Trinity Village; and Waterloo North Hydro. Gold Award recipients included Anchor Danly, Blackberry, Cambridge and

North Dumfries Hydro; Desire 2 Learn; Erb Group of Companies; Farm Mutual Reinsurance Plan and Ontario Mutuals Insurance Association; Grand River Hospital; Parents for Community Living; and Teledyne DALSA, while a Bronze Award went to United Way Kitchener Waterloo & Area, and Economical Insurance took the Innovator Award.

For companies interested in the 2016 awards, information is available on line at

www.projecthealth.ca.

Johal and Sangster encourage companies to think outside the box – and sometimes, outside their buildings – as they develop policies and programs to encourage health and wellness. When they start brainstorming during the interview, the ideas come thick and fast: "bring in speakers"; "provide written materials about health"; "mark areas in our around the building that are one, two or three kilometers, for walkers"; "put up posters"; "improve the lighting on stairways to make them more appealing"; "stairways in the middle of the buildings where they are available"; "flexible workstations that allow work standing up"; "walking meetings, to get people away from their desks"; "fifteen minute stretch breaks"; "move more, sit less."

The Project Health leaders agree that "engagement with

Project Health tries to work with a key person from each organization, typically someone in human resources.

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Johal and Sangster manage a growing program with limited resources, so they look for corporate "champions".

the program is growing," but they have to use their own resources very creatively to make it work. That's because when you add all the staff together who contribute to the regional program, although there are 10 names on the list, including eight topic specialists, their

actual time spent totals two – two full time equivalents. That's to administer and staff a program that currently impacts on 200 companies in the region. They target companies with 50 or more people, so the large number of employees involved is clear from the

math. As well, smaller companies can access support materials on the Project Health website.

To accomplish all this, says Johal, Project Health tries to work with a key person from each organization, typically someone in human resources. "We need this approach," she explains, "to be sustainable."

Another issue impacting on sustainability is funding – and Johal admits that the Project Health budget approved by Regional Council "keeps reducing." So they are constantly looking for "partnerships," and for champions in the companies involved, employees who will continue to make their health and wellness programs successful and sustainable.

Those are the people who attend the seminars and lunch and learn sessions at Project Health – events that are always very well attended.

Gretchen Sangster sums the program up: "It's all about behavioural change." X



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PROMOTING HEALTH IN THE WORKPLACE

Regional program impacting over 200 companies

Jessie Johal and Gretchen Sangster of Project Health.

BY PAUL KNOWLES

Project Health is a program officially offered to companies in Waterloo Region – but in reality, the companies are not truly the target group. Gretchen Sangster is a Public Health Nurse who is Project Health Lead. She says, “We wanted to reach a number of people in our community. Going through the workplace was the logical way to reach people in all walks of life.”

So, in October 2007, the Region of Waterloo Public Health division created Project Health, an initiative that provides health promotion services to workplaces interested in improving and sustaining a healthy workplace. Project Health provides consultation and support, networking sessions, web-based resources, lunch-and-learn sessions, referrals... and an annual awards program.

Kuntz Electroplating Inc. was one of nine Regional companies to receive the first-ever Platinum level Workplace Award. Tania Foreman, Director of Employee Services at KEI, called their relationship with Project Health “a win-win-win situation.”

She told Exchange, “At KEI, the Health and Safety of our employees is our number one priority. While Project Health and the Healthy Workplace Awards initially provided valida-

tion for our ‘wellness’ efforts, it has also provided direction, ideas and resources for areas where our program could be improved. Providing our employees with the tools they need to stay healthy is essential to ensuring the ongoing sustainability of our workforce; employees benefit, KEI benefits and in turn our customers benefit.”

Jessie Johal is manager of the Region’s Healthy Communities, Schools and Workplaces Program. She says that a key focus for Project Health is to “work with organizations” to create “day to day policies” that foster a “wellness culture.”

Sangster says that Project Health promotes four strategies.

The first step is “awareness raising,” creating a workplace environment “where people want to make a change or an improvement.”

Second step – “skill building.” This involves programs, typically “challenges,” that encourage behaviours that make for healthy living – contests that reward using the stairs, tracking activity with pedometers, or tracking healthy eating. Sangster points out that “if you try a new behaviour for four to six weeks, there’s more chance of sustaining it.”

The third strategy involves “environmental support”.

“If you try a new behaviour for four to six weeks, the more chance of sustaining it.”

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