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MAGAZINE FOR BUSINESS & ECONOMIC DEVELOPMENT

Vol. 34 No. 5 May 2017 - \$6.95



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THE ENTHUSIASMS OF
PETER BENNINGER

INSIDE

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- Branding Local Districts
- Building Leaders
- Pledges from Young Entrepreneurs

Corporate Culture has Community Connection



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IN CAMBRIDGE.**



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On the banks of the Grand River, the heart of Downtown Galt will soon see a \$100 million-plus revitalization project that will create a new thriving urban neighbourhood, known as *The Gaslight District*. The vision, curated by local real estate developer HIP Developments, will see the re-imagining of the historic Southworks and Tiger Brand properties on Grand Avenue.

The Gaslight District will transform the historic properties into an environment that will foster creativity and innovative thinking across multiple disciplines. It will be a mix of historic buildings and modern living where people can experience both the past and present of Cambridge. It will emerge as a complete community featuring trendy new restaurants, artisans, public art and shops, high tech jobs and stylish residences surrounding a European-inspired public square.

A NEW ARTS HUB WILL BE THE HEART OF HIP'S COMMUNITY BUILDING INITIATIVE

HIP has committed to creating a thriving arts culture by gifting 12,000 square feet of free space to establish an arts and music hub together with performance and gallery space, available to both local and touring international talent.

"We see the Gaslight District as the catalyst of a revived innovation and creative spirit fostering economic and social activity in Cambridge for years to come". Said Scott Higgins, President, HIP Developments.

The residential and entertainment portion of the Gaslight District will be built on the existing Southworks property. It will see the adaptive re-use of the 1800's foundry buildings to become Cambridge's premier restaurant, entertainment and artisan destination centered around a new large public square. Two new residential buildings will be developed, adding over 600 new residents to the Galt Core.

The former Tiger Brand property will house Grand Innovations. At over 50,000 square feet, Grand Innovations will provide a diverse environment with offices and workspace, specialized private and public support programs and workplace services, along with food services, presentation and recreation facilities. Conestoga College will serve as a primary partner along with Grand Innovations. The partnership will provide new opportunities for the college to expand applied research with a focus on e-waste recycling and industry needs related to cyber-security. Grand Innovations will be home to over 100 high-tech jobs in a collaborative environment with numerous support businesses.

HIP Developments is focused on community building and creating great places to live, work and play within our Region. The Gaslight District will establish a new regional district that will attract the creative class from both the arts and technology sectors. It will be a transformational project for not only Galt, but for the City of Cambridge and the Region of Waterloo.

This issue

Our May issue focuses on the intersection of corporate and community. We examine the contributions made by business to the overall health and vitality of our community, we look at the problems within our community that can only be solved with the resources that exist within our corporate world. This issue is our effort to build the connections and collaboration between our thriving business community, and the overall reality of our community



Next Issue

Innovation is more than ideas. It's ideas turned into reality- the art, science and craft of making concepts, concrete. Our region, already known as a hotbed of cutting-edge concepts, continues to be a global leader in bringing new ideas to market in tangible form. And we're gaining position. In our June "Builders' Edition," Exchange delves into the educational foundations, the public infrastructure, and the enablers themselves who help make ideas become reality.

email:

business.exchange@exchangemagazine.com for more information on how you could make your business part of this exploratory business feature. or go to: www.exchangemagazine.com/deadlines for dates and rates





On the Cover: Peter Benninger, enthusiastic philanthropist and businessman.

EXCHANGE

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EXCHANGE magazine is a regional business publication published by Exchange Business Communication Inc., CEO Jon Rohr. Seven issues per year are distributed to each company in Kitchener, Waterloo, Cambridge, Guelph, and area as determined by Canada Post Business Walk Analyst. **Subscriptions are available for \$85.43. Send cheque or money order to Exchange, PO Box 248, Waterloo ON N2J 4A4. Attn: Circulation Department.** Back issues are available for \$12.00 per copy. Phone: (519) 886-0298 x 301. ISSN 0824-45 Copyright, 2016. No part of this magazine may be reproduced without written permission from the publisher.



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MAY 2017

EXCHANGE

SERVING WATERLOO REGION AND THE INNOVATION CORRIDOR | VOLUME 34, NUMBER 5

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LET'S DO MORE AND LET'S DO IT BETTER

by PAUL KNOWLES

**Two suggestions
for would-be
philanthropists**



PAUL KNOWLES is editor of
Exchange Magazine.
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This may be the most important edition of Exchange magazine this year. Because in these pages, we focus on philanthropy – the foundation that

funds our community organizations.

A community without charities and not for profits is no community at all. It would be a cold, heartless place. So once a year, we publish an edition that highlights philanthropy. And in this space, I get to put in my two cents worth.

First, then, an argument for a broader perspective when you give. Everyone loves to give to new, sexy, capital projects. It's actually not all that hard to raise the money to build something. It's darned hard to raise the money to operate a facility, after the donors have been thanked, and moved on to some other front-of-mind capital project.

So when you give, I encourage you to consider giving to organizations, simply to keep them in operation. There are a number of examples around our community right now, fine organizations who are struggling to survive because they lack sufficient operating funds. You can help. You can be the key to their survival.

And second, an argument for going beyond financial contributions. I recently learned that about 50% of Canadians volunteer. That sounded pretty good, at first glance.

But when you dig down into the statistics, you learn that of those 50%, only 10% do about 53% of the total of volunteer work. To take it back to the entire population of this country – 5% of us are doing more than half of all the volunteer work.

That has to be wrong. The good news? It's a wrong that is easily righted. By you and me.

X



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Peter Benninger

BENNINGER'S BACK, AND EXCITED ABOUT THE FUTURE

The man who drives the fire prevention fire truck, and is currently Conestoga Board Chair, is ready to take on new challenges

BY PAUL KNOWLES AND JON ROHR

Peter Benninger understands that people do good things from mixed motives. Reflecting on his company's decades-long commitment to public fire safety programs, he says, "Quite often, you start off for selfish reasons – you want to network or promote your organization. And the next thing, you really like what you're doing."

Clearly, he's reached Stage 2. He loves what he's doing – and it's a nice side benefit that his corporate commitment to philanthropy results in Benninger getting to drive an antique fire truck in the Oktoberfest Thanksgiving Day Parade, every year.

Benninger is President of Coldwell Banker Peter Benninger Realty. His operation focuses on Waterloo Region, although Coldwell Banker is present in 47 countries.

His local company supports more than 30 community groups annually. He also plays a personal role in a number of organizations, including his current stint as Chair of the Board of Conestoga College Institute of Technology and Advanced Learning – a volunteer position. He has served on several community boards, including Canada's Technology Triangle and the Centre for Family Business.

Several charitable causes are especially close to the hearts of Benninger and his colleagues, including Heartwood Place, and Habitat for Humanity – the company has sponsored the construction of four Habitat for Humanity homes since 2001, most recently in 2016.

But Benninger's longest charitable involvement concerns his role as an "International Fire Safety Ambassador."

This role goes back to Benninger's first connections with Coldwell-Banker. He's been in the real estate business for 40 years, but became affiliated with Coldwell-Banker in 1992.

He told Exchange, "We got into the fire safety aspect because when I joined Coldwell-Banker, you got this media kit... They had a big program on fire safety."

The original intent was to help a brokerage get known in

the community.

Benninger's role in fire safety grew very quickly. He says, "I thought, if I'm going to do this, I'm going to do it right." Which led to what was in his mind the logical decision to purchase an antique fire truck!

He was asked to meet with the fire chiefs of Kitchener and Waterloo; "They explained that, with government cut-backs, they were suffering in their educational programs, getting the message out to school kids, and was there anything we could do to talk about that? And that's how it started."

Immediately, "We came up with the map concept." He and his team created a street map and service guide; it is now in its tenth edition; proceeds are used to fund educational programs for the K-W fire departments. The money has helped

fund the Fire Safety Education Van, the original and new Fire Safety Houses, and other components of the local fire safety programs. The proceeds have also funded two training vehicles, two portable fire extinguish-

er training units, and the Kitchen Fire Simulator.

Says Benninger, "The current map will take us over \$500,000 in training tools and equipment that we've been able to raise."

And the results are not simply calculated in financial terms. Benninger adds a real-life testimonial: "One of the student who went through the fire safety program developed through our efforts, was in a fire situation and got her mother out." He knows their efforts helped save that woman's life.

It's clear that a program that may have been launched as a PR effort has become so much more than that.

Plus, of course, there is the fun side. Benninger laughs that "I always drive the truck in the parade every year... this was my 25th year of driving in the Oktoberfest Parade. It's a pretty neat experience."

And while the truck has remained unchanged for a quarter of a century, the kids lining the route change every year – "and they're loving this truck."



Benninger says his "state of the art" headquarters is a highlight of his career.

"We all have two lives"

Benninger has known ups and downs in his almost four decades in the realty business – including a very personal "down" in 2016, when he was off work for months, dealing with a health crisis.

He is recovered, back on the job, and envisioning an exciting future, but the time off work did result in one change – Benninger remains President of Coldwell-Banker Peter Benninger Realty, but the man who replaced

about the major renovation carried out at the office during his absence. "It was great. We had a renovation, on the main floor. I've always been very hands-on with anything to do with the building, [but because he was in Toronto, being treated for his illness, he had] nothing to do with it. But when I came back... well, it's just awesome."

Benninger encountered a quote on the internet, which he has claimed for his own: "We all have two lives and the second one begins when we realize we only have one." He adds, "It is a good little reminder... I think I came out of that with some really good lessons learned."

Headquarters is a highlight

Benninger has known what it is to work in small operations, but over the years, has built his business to what it is today – a company employing over 100 people, involved in buying and selling all types of property, both residential and commercial.

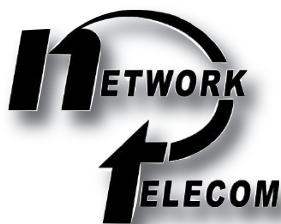
At one point, the business was

him as Broker of Record, Peter Kritz, has been persuaded to continue in that role with the company.

Typically, Benninger looks at his time off to deal with his illness – almost five months – as "a really good learning experience, to step back." He said that, for the first time, he realized, "You don't need to be there every minute of every day."

He becomes even more enthusiastic about lessons learned, when he talks

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located in five different facilities around the region, but in 2002, all five moved to what is still described as a “state of the art” headquarters at 508 Riverbend Drive in Kitchener.

Benninger says that this facility is one of the top highlights of his career – a career that includes personally selling more than 1,000 properties, including 127 deals in just one year, 1985.

The “one stop shopping” advantages of the Riverbend facility are unusual in the business, with residential and commercial sales teams

“The current map will take us over \$500,000 in training tools and equipment that we’ve been able to raise.”

housed in the same location. That, says Benninger, facilitates an unprecedented level of communication and information-sharing among his team members. “It’s worked really well for us. It’s just been such an exciting, collaborative kind of place.”

As well, says Benninger, the facility was well-designed for the future. “Clients will come to this building for the first time, and they think it’s new or a couple of years old. We built it in a fashion that it hasn’t aged.”

Benninger recalls the first visit from the world-wide president of Coldwell-Banker. “He looked at me, and stretched out his hand and said, ‘I feel like I’m in Star Wars. There’s nothing like it.’”

Although he has appointed a new “Broker in Charge”, Benninger has not stepped away from the business. Since recovering from his illness, he says, “I still love coming in every day. I’m a high-energy person. I don’t plan on really exiting any time soon.”

Career milestones

When Benninger reflects back on his career, even his “highlights” come with a touch of humour. He recalls long-time Record business columnist Henry Koch – whose column about local business was actually the original inspiration for Exchange Magazine, 34 years ago. Benninger remem-

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*Zainab Ramahi, Class of 2010
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"Real estate is a lifestyle", says Benninger

bers that Koch referred to him as "the Six Million Dollar Man," because of the level of his sales.

But he also remembers an anecdote that morphed well beyond reality in Koch's column. Benninger had told Koch that, "Real estate is a lifestyle, it truly is. If you go to a party, people love to talk to you about real estate. They don't want to talk to you about life insurance, but they sure want to talk to you about real estate. I could be standing in the corner of the hockey arena watching my kids play hockey, and I'm talking real estate because somebody wants to talk real estate."

By the time it went to print, that story had taken on some added drama. "Henry wrote, "Even when Peter plays hockey, and is crunching someone into the corner, he is still talking real estate."

During his first 12 years in the business, Benninger only sold housing... "a lot of homes". He stopped selling to focus

on building his business, creating his sales time and merging offices, in 1990, but became involved in the commercial side of the business in 1996, "and it's been wonderful."

Benninger can be very philosophical about his business. There's a lot of turnover: "If I went back and I looked at my roster 20 years ago – and I still have good people on my roster from 20 years ago, good agents and loyal – but if you had 100 people 20 years ago, 90 are different from that hundred."

"We all have two lives and the second one begins when we realize we only have one."

Our business is just like that. It's a tough business – there's a large percentage of people that don't make it."

But he thinks he knows the key to success: "The people that make it are the people you can knock right to the canvas, they're down for the nine count, and they get back up and they just keep going. They're willing to go back into the ring. Those are the people you will see successful in this business. And they come from all different walks of life... The most important thing is being able to take rejection, to be knocked to the canvas."

Riding the wave of change

There is no doubt that the real estate business has changed dramatically in the past decade. Benninger says the biggest change is "how easily accessible information is."

Once upon a time, the key value a realtor brought to clients was access to information that could not be obtained any other way. Today, all that information is available on line, at the click of an icon.

He believes that his company has thrived because "We always acted as advisors – that's the approach that we took to the market."

He quotes his corporate mission statement, which says, in

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"I have never seen the effect of the Toronto market on our market like this"

part, "The Mission... is to provide exceptional service by achieving the goals of both Buyers and Sellers... We are a team dedicated to delivering up-to-date, honest, reliable information, preparing our customers and clients to make intelligent, profitable and exciting decisions."

He sums up: "It's about advice. The things you can't get on the internet, or a piece of paper, or a photo, or whatever, are the things that we know about the community, the subtle little things... that people should look for when buying or selling a home."

Market driven by Toronto

Benninger sales that the current boom market in Waterloo Region is being influenced by Toronto buyers in an unprecedented manner. "I have never seen, in all my career, the effect of the Toronto market on our market like this. There were times when the Toronto market was going nuts and had a little effect on it. But now, it's a strong effect, it's long, and it doesn't seem to go away."

While this may be good news for sellers, he knows there is a down side: "Local people are having trouble affording a home now. It's making it hard for our local people, under our local wage earnings, to afford the homes that Toronto folks are pushing the price up on."

He suggests that the strong local selling market has some people selling their homes on their own. He agrees that this is feasible: "People feel in a market like this, 'I can just sell my house myself.' And they can – it's a very good market."

But he warns that a boom market creates unique challenges, pointing to a recent sale of a home where the owners received 13 offers within days, many over the list price. "Tell me, who has the expertise to get through that process?" In Benninger's mind, that's where an experienced realtor is essential – and he notes that the home sold for \$71,000 over the list price.

Looking ahead

Benninger is the owner of a number of properties in Waterloo Region, including land adjacent to his Riverbend office facility. But he's most excited about an admittedly controversial investment – the majority of the land in Hidden Valley, located in Kitchener, bordered by Wabanaki Drive and Hidden Valley Road. Benninger's land covers 58 hectares, including environmentally sensitive lands and areas inhabited by a threatened species, Jefferson salamanders.

Only about half the land can be developed – the other half is environmentally protected land, and Benninger says that is one reason he was attracted to the site for its sheer, natural beauty, which he vows to protect.

"It's an absolute gem of a property."

"I wish I were a little younger.

This stuff does not happen overnight.

This is going to take time... five years, ten years, 15 years."

He says "the areas to be protected have been identified," including the habitat of the Jefferson salamanders.

He told Exchange, "There are folks out in the community that are very, very passionate about this property and don't want to see it developed, and might even be labeling the owner of the property as this person that's going to destroy the beauty. Where it's exactly the opposite. I'm so excited about this. I've owned the property for years and years... I love nature. I'd like to see a lot of people enjoy this. The regulations will control and protect the environment, and we will work with all those regulations to do the right thing."

"It's what can be done around this for people to enjoy this. Now, it's private property, held by one person. This can be enjoyed by a lot of people."

He adds, "There are groups that want to stop this because they don't believe there could be anybody else but them that could be a steward of this land. I think this is a very important part of this... the stewardship. There's going to be some heartache, I'm sure, but I think I'm up to the challenge."

He repeats, "I'm really excited," and then adds, somewhat wistfully, "I wish I were a little younger. This stuff does not happen overnight. This is going to take time... five years, ten years, 15 years. It's going to be staged. There's a piece that could probably get developed in the next 5-7 years."

"There are other things I do, that I'm working on, that will come forward in the next few years. But this is the big one... This one is more than just business. You just have to believe in your passion and vision and carry on."

He adds, "This is the best infill project in the region... I've got lots of ideas, but I don't know what that's going to look like. But I know it's going to be great."

And overall, since returning to work, "Things have ramped up for me," says Benninger. "I'm really excited about the next decade."

X



BRANDED DISTRICTS: A KEY TO LOCALIZED SUCCESS

Waterloo Region, right down to the core.

BY PAUL KNOWLES

Waterloo has made a lot of headlines in recent months – including as a feature story of the March/April 2017 edition of Exchange Magazine. There is no doubt that the adoption of the Waterloo EDC brand by the Waterloo Region Economic Development Corporation represents a new era in cooperation among the eight municipalities that make up the Region of Waterloo.

But at the same time as all eyes are focused on the macro, regional picture, there is no doubt that there is another, “micro” movement happening. Small, coherent districts, part of our larger communities, are emerging as centres of activity and attractive destinations.

This is not entirely new – think “St. Jacobs” as a district that has functioned as major destination for decades. Or the impact that our three post-secondary institutions – University of Waterloo, Wilfrid Laurier University, and Conestoga College – have had on their immediate environs (and on the areas in which they have chosen to expand).

John Whitney, of Whitney Commercial Real Estate Services, says, “I think we overlook the power of the universities and what they’ve done for Kitchener Waterloo – The buildings that are being built, the programs, the number of students – it’s a huge engine for this economy.”

Related to the university district is the area now known as “The Idea Quarter.” Cameron Rapp is Commissioner of Integrated Planning & Public Works for the City of Waterloo. He says The Idea Quarter is “emerging as a ‘hotbed’ for rapid growth and employment. It is generally the area around Columbia, Phillip and Albert Streets, and includes the University of Waterloo’s David Johnston Research & Technology Park. We have seen tremendous employment growth in that area of the City, with a balanced portfolio of start-ups and mature international companies. This area will continue to explode in the future as it has access to two ION LRT Station Stops.”

Similar kinds of unique “districts” are popping up

throughout the region. Two factors are driving a lot of this activity – in Kitchener-Waterloo, the ION Light Rail Transit corridor is making everyone re-imagine the cores of the cities, and throughout the three cities of the region, brown-field and re-purposed development is making an impact.

The LRT Core

In a way, there is a chicken-and-egg element to the Light Rail Transit impact. The LRT route is causing a huge developmental transformation; but the route was chosen because it travels through the existing, historic cores of the cities.

But those historic cores are seeing huge changes. Once upon a time, the “brand” of much of Kitchener’s core was “the manufacturing district” or “the fashion district” – a heritage acknowledged in the new public art that graces the new overpass at Weber and Victoria, with its industry icons.

But the day of the factory is over, and the district has been re-branded as the Innovation District – one of the most successful smaller district branding exercises in the country.

Kitchener Mayor Berry Vrbanovic points to the Innovation District as just one of many self-identified such districts in the city. He also lists, “The Market District, the Downtown BIA district, Belmont Village...”

He describes the Belmont area in terms that could apply to all of these districts, and more: “a revival in recent years.” That applies to the shops, the restaurants, and the services – and of course to the impact of Catalyst 137, just around the corner on Glasgow, self-branded as “the world’s largest Internet of Things manufacturing space.”

The Belmont neighbourhood is a bit unusual, in that it is not on the LRT route – although transit links are easily accessible. Other major Kitchener “districts” tend to be on the route, especially the Innovation District, with its unprecedented record of attracting high-tech residents.

Cory Bluhm is Interim Executive Director of Economic Development for the City of Kitchener. He offers a thoughtful analysis about the impact of the LRT on existing and emerging localized districts: "For the past decade, Kitchener's Innovation District has been rising as a key part of our downtown core, and it certainly is emerging as a key area within downtown that will benefit from the improved transit options LRT will bring. The other thing that the LRT will allow is the expansion of what people currently perceive to be the downtown – which is currently from Victoria St. to Cedar Street. Midtown is developing in its own right, and development interests south of the Kitchener Market are growing.

"But more importantly, LRT will allow people to travel to and from the downtown more quickly, while also connecting the core to the central neighbourhoods and suburban neighbourhoods along the line. As a result, more people will start to see themselves as part of the downtown community. We also know that typically, with transit infrastructure, communities start to develop around the key station stops, so we can expect to see that happening in key areas in the city along the ION route. The city plays a role in helping to set the stage for this kind of organic formation of community – through strategic planning, we create the environment for it to happen, and then developers, residents and city-builders bring the areas to life."

In Waterloo, the universities dominate the urban landscape, but Uptown Waterloo, anchored by Waterloo Town Square and the new office building now completely leased by Shopify, is also ready to boom.

In fact, the whole LRT corridor is primed for action, Scott Higgins, of HIP Developments, says, "We have over 1,000 [residential] units planned for the King Street corridor. 'Life on King' is the branding we're using for it. Roll out is over the next five years."

And Ginger Whitney, of Whitney Commercial Real Estate Services, adds, "It's becoming more of metropolitan city, with the core, with the uptown, with the downtown, with the LRT connecting everything."

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Kitchener Mayor Vrbanovic believes there will be new districts developed, and sees great potential in two sites he mentioned – the former Boehmer Box factory at the corner of Duke Street West and Breithaupt Street, and the now decommissioned J.M. Schneider complex on Courtland Avenue, where he pointed to “the opportunity to really redefine that neighbourhood going forward.”

James Goodram, Economic Development Officer for Cambridge, believes that his city has a huge resource in its downtown districts. He spoke of “our historic cores of Galt, Preston and Hespeler. These cores have long been districts in which the City has supported and fostered growth.” He credits the district BIAs for their “support and promotion” of these areas.

And he points to the exciting developments in those districts, including the Gaslight District (led by HIP Developments). Goodram says, “The project, private sector driven, envisions the area around the Dunfield Theatre as being a mixed use complete community area that includes a mix of residential, office, commercial, restaurants with the truly exciting addition of artist’s creative space, a public square for events and performing arts at what is known as Southworks along with a partnership between HIP Developments, the City, a not-for-profit tech incubator known as Grand Innovations headed up by Tim Ellis, Greg Dalton and Jody Schnarr and Conestoga College led by Barbara Fennessy in the former Tiger Brand Building. This tech incubator will be something different and unique... This addition, along with some of the great tech companies in Cambridge... will firmly root

Cambridge as part of the Toronto to Waterloo Region Innovation Corridor.”

Goodram believes that Cambridge will thrive on the foundation of its neighbourhood districts, from the three city cores to the rapidly filling Boxwood Business Campus.

Overall, he says, “Having branded districts is an important part of the puzzle for economic growth. Districts create a sense of place and belonging that people can identify with and be proud to be a part of and promote.”

X



The new Weber Street underpass, by the train station, located at the junction of Kitchener's Innovation district, Heritage district and our out going Transportation Hub. Concrete columns are adorned with graphics that celebrate the community's past diversity in industry and global success.



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Hamid Noori

LAZARIDIS PROGRAM PRODUCES LEADERS READY FOR DISRUPTION

It's a unique sales pitch: "Our learners go through hell, but in a good way." Unique, but probably a spot-on assessment.

That's a comment from Hamid Noori, Executive Director of the new Lazaridis Executive Master's in Technology Management program. He continues, "Our learners know why they are here. They are committed to put in the time and effort. If you talk to any one of them, they all would tell you, 'I'm spending a lot of time on this, but I am loving every minute'."

The Lazaridis EMTM program is based at Wilfrid Laurier University's Lazaridis School of Business & Technology. The program was first launched three years ago, but has now come under the aegis of the Lazaridis school, giving it a new thrust and a heightened level of exposure.

The program is all about being ready for the "disruption" that is a central theme of today's corporate world, especially in the tech sector.

Noori says that the program is all about being ready for the "disruption" that is a central theme of today's corporate world, especially in the tech sector. EMTM grads – who finish the intensive, 11-month course with a M.Sc. in Management at the executive level – are prepared deal with disruption in their own companies – and to be disruptors, themselves.

The course is aimed at senior decision-makers in companies that develop technology or utilize technology. Learners – who hold professional positions in corporations – meet every second weekend – 23 sessions in all – and are also required to produce a major research paper. It is clearly an intensive program, and one that is unique in Canada.

It's also quite exclusive – the program selects up to 20 (typically, only about 15) candidates from among its applicants. Says Noori, "These are people who are up-and-coming C-level executives, already very experienced people, with enough experience in making key decisions. Now, they are preparing for the next challenge of their lives – to be a leader of an enterprise instead of being focused on one particular area."

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Noori is delighted that the EMTM M.Sc. program is now offered under the Lazaridis banner, but he's also happy that he and his colleagues had the opportunity for "a dry run, three years ago... It is a new program, but really a program we have put a lot of time and effort in, in order to develop it."

He says the feedback from the learners who are part of the program is key to ongoing assessment: "They have had a fantastic time, they all talk very highly about the program."

Noori describes the program as "a hybrid", combining the strengths, and the demands, of an M.Sc with a professional degree. "It is not an executive MBA. It's unique, a hybrid between professional and true MSc program."

The program has been developed to serve the knowledge and innovation community of southern Ontario – because of the weekends-only schedule – but participants are showing interest from much further afield. An Alberta resident will be part of the next cohort, commuting for every two-day weekend session, and there has been interest from other countries. Noori also notes that, in the current cohort, there are two learners who hold PhDs – more evidence that something unique and essential is happening in the Lazaridis EMTM program.

Noori believes Waterloo is the perfect place in which to base this unique and innovative program, because of the region's experience both with start-ups and as home to many of the largest tech companies.

The approach to the program is thematic, not course-by-course, so learners do not complete one course and move on to the next – this is a completely integrated approach. Themes included in the program range from "linking technology and strategy" and "value creation and drivers" to "intellectual property and commercialization" and "globalization" – and much, much more.

Sessions are led by a wide variety of faculty members, including Lazaridis and WLU professors as well as guests

from American schools like the University of California Berkeley, and Stanford University.

Noori stresses that the goal of the program is to produce leaders, decision-makers, C-Suite executives who know how to change and adapt a business model to achieve success.

He points out, "Many of the companies once on the Fortune 500 do not exist any more, and many of the top companies were created in the last 10 or 15 years. The world is changing. And this is what this program is designed for. We are developing the leadership of the future."

Noori says that the program, itself, could be classified as "disruptive." Many

Waterloo is the perfect place in which to base this unique and innovative program, because of the region's experience both with start-ups and as home to many of the largest tech companies.

of the themes addressed certainly have a disruptive component; for example, learners are asked to take on the whole question of intellectual property – a cornerstone of most tech companies – and wonder if companies would be better served to abandon their efforts to protect their IP, and instead, "put all their effort into coming up with new products over and over, much faster than whoever wants to copy it." Learners will also grapple with the concept of "open innovation."

All of this, says Noori, is to prepare tomorrow's corporate leaders to "step back and think... and change."

He adds, "We're talking about how you may change your strategy, about how much flexibility you have to change your business model, because it's easy to say 'let's change our business model,' but it's actually very, very difficult. If you do not have the mentality and the preparation, more than likely, you are doomed to fail."

Noori and his colleagues at Lazaridis are enthusiastic about helping corporate leaders to be successful, problem-solvers, executives who welcome challenges, who not only deal with disruption, but initiative disruption as the new leaders of an innovative, global ecosystem. - *Exchange Magazine* X

LEADERSHIP: FROM THE WATERLOO REGION PERSPECTIVE

Eighteen years ago, a coalition of Waterloo Region organizations identified a need to nurture new leaders to fill a looming "leadership gap". With seed funding from the J.W. McConnell Family Foundation, they formed Leadership Waterloo Region.

Today, Executive Director Anne Lavender says their goals are being met – but the work is far from complete.

Lavender says that studies were indicating that as baby boomers retired, the result would be a lack of trained leaders in all sectors – business, government, not for profit, with a negative impact on the entire community.

The founders of Leadership Waterloo Region came to conclusion that "if we didn't do something proactive, we were really going to be facing a shortage of leaders in the community."

In the past, leadership simply emerged as people stepped forward – but this situation was different. The demographics meant that a strong leadership group had to come from a much smaller generation. That, she says, felt "a little bit like gambling" – and community leaders weren't willing to step back and trust to chance. They felt, says Lavender, "We need to get the right people in the lead."

It worked. Today there is a strong group of Leadership Waterloo Region alumni – 425 in all – "and we're starting to see things happening in the community," says Lavender.

She doesn't see 18 individual classes – she sees one alumni group, networking and "cross pollinating."

Says Lavender, "It's not unusual now for me to see something wonderful happening in the community, and... there are three or four Leadership Waterloo Region alumni there. They're everywhere... in all different areas of the community."

The program continues to produce people trained to be community leaders. Each class

includes between 25 and 35 people, and Lavender points out, "These are people from different sectors, who have different viewpoints."

Says Lavender, "Where we are different, we are really community based, we are a geographically based leadership program. It is about and for this community. We're helping people to learn about their own leadership skills, their own leadership style, what their affect is on others, how to work with a group, how to bring people on board, how to manage change. We're teaching them about emotional intelligence, about a whole list of different skills and we're doing it with the community as the canvas."

The local connections are very powerful. Class members may meet local leaders like John Neufeld from House of Friendship and Pat Singleton from the Cambridge Self Help Food Bank. Lavender says that these occasions really open the eyes of the class members to the challenges in their own community.

Lavender also sees an opportunity for Leadership Waterloo Region to reach out to potential leaders who don't come from traditional regional roots. "People were coming in from other places, and they weren't connecting. University students were coming here from all over the world to study, and they weren't staying. We have to make people feel like they're connecting... Once they've connected they'll feel like it's theirs, and they want to stay."

"So that became one of our roles as well – slowly bring people together so they can put down roots."

There's much more to do, says Lavender. Newcomers are still struggling



Anne Lavender

to connect to the community – she points to the influx of Syrian refugees as one example.

And she says that she is not afraid to fail. She buys into the tech mantra of "fail and fail quickly," arguing that a first iteration rarely works. So expect Leadership Waterloo Region to take risks as the organization seeks to fulfill an ever-changing mandate – but expect, as well, that the graduates of this innovative program will continue to take leadership in every important sector across the Waterloo Region community. - Exchange Magazine

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PARTNERSHIP WITH HABITAT FOR HUMANITY A WIN-WIN FOR TACOMA ENGINEERS

The people at Tacoma Engineers understand building. The company's expertise is structural engineering. Tacoma President Mike Gilles describes it as "the only engineering we do, designing structures of any type. It can be single-family homes, multi-unit residential buildings, apartment buildings up to mid rise, a lot of churches and commercial buildings, agricultural buildings, some schools and university work."

So with this area of expertise, it's not surprising that when Gilles and his colleagues decided to offer their support to a not-for-profit organization, they chose Habitat for Humanity, the Wellington-Dufferin-Guelph chapter (Tacoma Engineers is headquartered in Guelph).

Gilles says, "What I learned about leadership and management, and about building teams, is that everyone needs a

purpose, everyone needs meaning, to make their job satisfying. So what I wanted to do was have a plan, have something tangible, so that everyone at Tacoma Engineers could find meaning and purpose in something that they could be attached to."

Gilles reached out to Habitat for Humanity, and "they were ecstatic."

The Tacoma President thought this could be a win-win, because while Habitat for Humanity would benefit from the expertise of the Tacoma volunteers, Tacoma would benefit by having employees with additional, hands-on experience. Says, Gilles, "We've always found that employees with practical experience in construction made really good engineers, because they understood how things come together, they understand the logistics of building something."



Tacoma Engineers President Mike Gilles

He asks, "What better way to give people practical experience than to get them out on a site, in an environment where they're helping a family build an affordable house?"

The proposal was a hit both with Habitat and with Tacoma's team. Gilles says, "The response within our group was really positive."

That was partly because Tacoma put some added value into the mix: the management team decided, "We would

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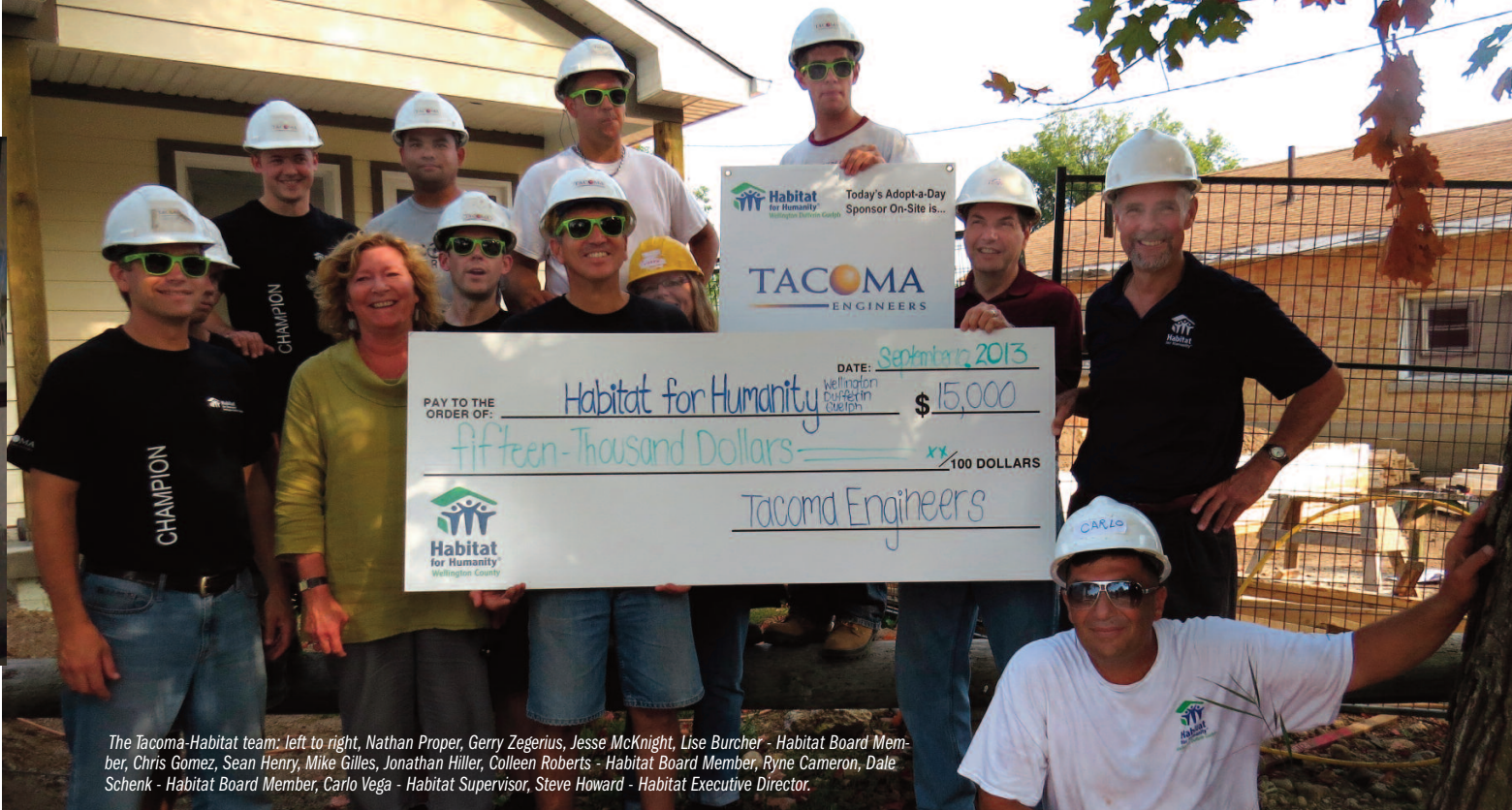
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The Tacoma-Habitat team: left to right, Nathan Proper, Gerry Zegerius, Jesse McKnight, Lise Burcher - Habitat Board Member, Chris Gomez, Sean Henry, Mike Gilles, Jonathan Hiller, Colleen Roberts - Habitat Board Member, Ryne Cameron, Dale Schenk - Habitat Board Member, Carlo Vega - Habitat Supervisor, Steve Howard - Habitat Executive Director.

pay people 50% of their time on the site, just so that they knew we would be supporting them, and so they would have to put skin in the game."

As soon as the arrangement with Habitat was confirmed, teams of people were dispatched from Tacoma to two home builds in Guelph.

Says Gilles, "We always try to get there when we're framing, putting the walls up, putting the roof on, doing the things that we design. We're willing to help anywhere, but that's what gives us the benefit, at no cost to Habitat."

Gilles explains that the company employs "three or four people who have framing experience," so they bring that expertise to the build, and they also have the opportunity to experience being in a leadership position, as leaders on the site.

Gilles says that the Habitat homes are not the only things being built during the projects: "It's team building. Whenever we talk about our group, it's not all about Habitat but it's about having that meaning and purpose, that we provide affordable housing, through our association with Habitat."

Their involvement with Habitat has helped to create a positive corporate environment at Tacoma Engineers. Says the President, "We want to be the company that people come to because of the way they get treated. So we focus a lot on the non-technical things, of being a team that shows leadership, trust, communication, and accountability. Any opportunity you have to put employees in a different situation, you learn more about them. The more you learn about each other, the more you learn to trust each other, and the better team you make."

"Being out on the site, swinging that hammer, is a different environment, and you learn about each other in a different way than you would in the office."

Tacoma Engineers' involvement with Habitat for Humanity has gone beyond providing expert volunteers. Gilles says, "We have a partnership with Habitat. We give them cash,

because they need cash. They've got assets, in terms of the various mortgages they own, they've got land that is banked, but they don't have a lot of cash on the balance sheets and that's what they need to get these projects going."

The partners at Tacoma Engineers have an unusual understanding of community. Gilles has been with the company for 30 years; none of the six partners have ever worked anywhere else.

Gilles says, "The people who are here also value things like the family, the community, the environment."

The company was founded in 1986 as Tacoma Steckley and Associates. In the early 1990s, Jack Tacoma became the majority owner and Mike Gilles became a minor shareholder. In 2007 Jack retired and Gilles became president, with Gilles and five other partners taking over the ownership of the company."

The company now employs 44 people, with a second office in Barrie. A lot of their work is done in Guelph, but the company is also active in Kitchener-Waterloo, the GTA, Ottawa, Kingston, and Thunder Bay.

Jane Hennig is Executive Director of the Volunteer Action Centre of Kitchener Waterloo and Area. She recently told Exchange that there is a shift in volunteerism. "Historically, Canada has been very service oriented – it's about giving back to our community, it's about being part of the community for the community's sake... We are starting to see a shift [toward] a growing number of people who are wanting to come with a solution to a issue. And so they are bringing their skill set, their expertise, and their passion for that issue."

Hennig says that can be "a very positive shift." And in the case of Tacoma Engineers and Habitat for Humanity, there is no doubt that this focus on finding solutions – for the charity and for the donor company – is creating a win-win situation for everyone involved. - Exchange Magazine



At the launch of the Pledge program were, Back Row (left-right): Stuart Linley, Co-founder & CFO, H2nanO; Calvin Chu, Founder, Palette; Khanjan Desai, Co-founder at Alchemy; John Zupancic, Founder, Wriber Inc.; Ryan Brown, Founder, Salient Energy; William Zhou, Co-founder & CEO, Chalk.com; Moufeed Kaddoura, Co-founder & CEO, ExVivo Labs Inc.; Eric Blondeel, Co-founder & CTO, ExVivo Labs Inc.; Bryan Fedorak, Founder & CEO, Bartsian; Tim Leschuk, Co-founder & CTO, H2nanO; Middle Row (left-right), Erin Laidley, Marketing Director, Innovative Protein Technologies; Pearl Sullivan, Dean of Engineering, University of Waterloo; Mike Stork, Investor & Entrepreneur; Feridun Hamdullahpur, President and Vice-Chancellor, University of Waterloo; Yassir Rizwan, CEO & Co-founder, Labforge Inc.; Michael Tatham, Co-founder & CEO, MAJIK Systems; Front Row (left-right), Laura Vaughan, Co-founder & CMO, Acorn Cryotech; Steven ten Holder, Founder and CEO at Acorn Cryotech; Chong Shen, Co-Founder, Alchemy; Kamal Aman, Co-Founder & Systems Architect, MAJIK Systems; Thomas Reidemeister, CTO, Labforge Inc.; Julia Salvini, President, Salvini Consulting Inc.

“PLEDGE” - A PROACTIVE WAY OF GIVING BACK

The University of Waterloo’s “Intellectual Property” policy has proven either wildly generous, or wonderfully successful, depending on your point of view. Almost everyone in the start-up and high tech communities would agree on the latter assessment, and say that UW’s willingness to permit inventors and innovators to retain

full ownership of their creation is a key to the dynamic high tech community in Waterloo Region.

UW was a pioneer in this approach; a few universities have followed suit, while others retain the rights to – or some form of income from – proceeds from the

creations of their faculty and students.

Now, a new program, dubbed “Pledge” has been created to invite young entrepreneurs at the university to pledge their support when their company has grown.

Acorn Cryotech is one of the initial cohort of Pledge members. Acorn was one of four start-ups to win \$25,000 in Velocity Fund Finals in the fall of 2016, and a company about to launch. Acorn CEO Steven ten Holder explains their unique innovation: “We’re Cryopreserving people’s young cells, so that we can use them in the future with

more advanced medical technologies when they come around. The cells of our body today are the best they ever will be, since we’re not getting any younger... if you take samples of yourself when you’re younger, and then apply those samples to yourself when you’re older, a lot of new possibilities arise from that.”

Jason Coolman is UW’s Associate Vice President, Development and Alumni Relations. He explains, “University of Waterloo doesn’t take an Intellectual Property position, [and] it’s been a strength of [the university]... We get a lot of great inventors, whether they are researchers or students, coming here because they know that what ever they create they own it, going all the way back to Mike Lazaridis founding RIM which later became BlackBerry.”

That approach is great for the inventors, and clearly a huge factor in creating a strong innovation eco-system, but it does mean



Jason Coolman



William Zhou, of Chalk.com.

that there has been no immediate ROI for the university from the many successes it has launched.

Coolman says, "The traditional model had been to wait until these companies are extremely successful," and then approach them about returning financial support to the university. But a new approach has been created – the "Pledge" program, in which companies currently benefiting from the facilities and the environment of the university can look to the future, and make a voluntary commitment now to support the institution that nurtured them and their creations.

Mike Stork is a member of UW's Board of Governors, and Chair of the Accelerator Centre. He's been party to discussions about how the university could capitalize on the many successful start-ups spawned through its facilities – especially the ever-expanding Velocity Program, which has added laboratory facilities and more creator space in the past year. He told Exchange that these students and faculty members are benefitting from "a lot of public money... the cost of labs, the whole cost of the teaching environment, whatever other mentorship they get through the university."

He says, "In the Accelerator Centre, the companies that I've mentored, and others that I've directly invested in – I've always advised the young guys that you want to try to pay it forward, by some means."

It's clear from the level of initial participation, that the Pledge concept resonates with the young student entrepreneurs. People creating start-ups through university programs and facilities are being encouraged to make a pledge – possibilities range from 1% of the company to a gift of shares to a small percentage of their eventual profit.

The start-up founders know there is a fundamental difference the way [other] universities operate, compared to UW, where from the very beginning, a creator – professor or graduate student – owns their own IP.

Experience shows that almost all of the most successful entrepreneurs launched from UW understand the responsibility to give back to their school – companies like KIK,



Laura Vaughan and Steven ten Holder of Acorn Cryotech show off their new "Pledge" socks.

Clearpath, and Miovision, and before them RIM and Open Text, among others – but the Pledge program is based on the belief that the commitment to give back is best made while the potential entrepreneur is still at the university.

William Zhou, of Chalk.com, is enthusiastic about the Pledge concept. Chalk.com, now located in downtown Kitchener, now employs more than 20 people and is serving the education sector across North America,

Zhou says, "When you look at what the University of Waterloo has done for us, it's incredible, whether it's the monetary support from the Velocity fund, the offices, the mentorship – that all culminated to our existence today... When the start-up pledge came around, it gave entrepreneurs like ourselves a way to say thank you and a way to give back to the future of entrepreneurs and future communities."

Tim Leschuk and Stuart Linley are co-founders of H2Nano, a photocatalyst nanotechnology for passive waste water treatment and environmental remediation using only solar energy or UV light. They developed their concept as students at UW, working with Dr. Frank Gu, who is CEO of the company. The collaboration has stretched over 10 years.

Regarding the Pledge, says Linley, "We've made the commitment that we will be giving, when the business is profitable and there is something to give."

He adds that creating their company "would be impossible to do without the resources the university has provided us... There is no way we would have the opportunity to develop this tech without the support network. Even what we're doing with the company now... the university allows us to make use of lab space." The dozens of start-ups and prospective entrepreneurs at UW are being encouraged to voluntarily sign up for the "Pledge". Their donations will both pay back – to the school for the unique level of support provided, and pay forward, allowing UW to do even more for future entrepreneurs. – Exchange Magazine

X



Stuart Linley and Tim Leschuk of H2Nano.

CORPORATIONS FOR CONSERVATION AT THE rare CHARITABLE RESEARCH RESERVE

“Corporations for Conservation” provides opportunity to support what *rare* has to offer in the community

When Russell Higgins, President of MacPherson Builders, Toronto, learned his company had been chosen as Builder of the Week in a recent edition of *The Record*, he was thrilled. “It’s not that we are selling homes in Waterloo Region right now,” says Higgins, “but we do feel a close link to the community since each home we sell in Fergus and in all of our Collingwood developments, generates a donation to the *rare* Charitable Research Reserve, situated at the confluence of the Grand and Speed Rivers, an important water resource to

the entire watershed.” Higgins says he is also pleased to be welcomed as one of *rare*’s Corporations for Conservation. “The contribution *rare* makes to a new research economy is more proof that a robust economy and a high quality of life can go together to create unprecedented opportunities — if we have foresight and think for the long term as well.”

“That’s one of the things that make members of our Corporations for Conservation such good partners for *rare*,” says executive director, Dr. Stephanie Sobek-

Swant, “These companies show a clear respect for the past while focusing and thinking big about the future. They recognize how fundamentally important this is at *rare* because they do it themselves.”

MacPherson Builders offers all their homeowners the chance to be involved with *rare*’s effort to get Every Child Outdoors (ECO) no matter where they live, and they, too, can help create a balance of development and conservation by participating in *rare*’s online effort to Turn the Map Green (www.turnthemapgreen.ca) that allows even school children to participate by adopting lands for as little as \$2/square metre.

Christie jumped at the chance to be the inaugural member of this new program designed both to recognize what these companies have already done to act as stewards of our environment — and to indicate their aspirations for the future. Their \$5,000/year donation, for a minimum of five years, is a conservation commitment in itself and they gain access to the many researchers and practitioners who work at or advise *rare*. Christie is well known for its outstanding recycling rate of approximately 90% that includes even a type of styrofoam. As Jennifer Smith, Executive Vice President, Global Market Solutions & Engineering, says, “This conservation effort and the recognition that goes with it connects customers and employees to a cause that matters for everyone. We think it leads to workplace giving and healthy living.”

KPMG partner, Rob Connell, also appreciates the Corpora-

tions for Conservation opportunity to support what *rare* has to offer the community, including the international community and future generations. “While we work with many great organizations locally, *rare* is one of only four that we consider strategic partners and we see *rare* as a world-class organization whose reputation is only starting to catch up with the incredible work they are doing. We support organizations that are well-managed and fiscally-responsible, with good governance, a strong management team and a healthy slate of directors and advisors who are visibly working with the organization. At the end of the day, we are looking for an ROI for *rare* with our money — not an ROI to KPMG, but for *rare* to leverage KPMG donations to raise even more money.”

Major gifts manager at *rare*, Christine Thompson, points to KPMG’s ongoing recognition of their “alumni” as a good example of big-picture thinking. Rob and his colleague, partner Mary Jo Fedy, frequently make introductions among former colleagues and introduce them to opportunities in the community.

Jackie Hatherly-Martin and Keith Martin are KPMG alumni from in the ‘90s, now running their own practices. Both, but especially Jackie, have been volunteering for *rare* since its early days and they continue to keep the KPMG network alive at *rare*. “It’s hard to over-estimate the importance of having an urban land trust in our community. There are over 900 acres in *rare*’s first three properties — that’s bigger than New York’s Central Park, which we all know has a big impact on the quality of life for people there,” says Hatherly-Martin. “Through expert management, sensitive lands and research sites are protected while the public enjoys eight km of trails, extensive community gardens and regular interpretive events.”

“Another example of how the KPMG culture encourages big-picture thinking,” says Thompson, “involves partner Paul Ross, who moved in 2015 to the KPMG Calgary office to lead the forensic practice in Alberta, and remains a *rare* supporter.” Ross says, “As *rare*’s reputation as an international research institute grows, so will the role it plays in a strong, diverse economy in Canada. I think those who started *rare* have amazing foresight and I like to lend a hand to help it become even more established.” Paul and Rita and their three daughters joined with Carol Ann and Gerald Achtymichuk and their four children, as co-leaders of the campaign to help renovate the 1840s limestone slit barn at *rare*, one of only a few left in the province. It is now a three-season trail head and site of the Every Child Outdoors program that provides environmental education to more than 2,500 children and youth each year in a unique Chain of Learning, giving children and youth the chance to work alongside some of the best environmental researchers in the country. Gerald, a physician in Cambridge, also serves on the *rare* board and points out that the *rare* Chain of Learning is a



KPMG partner, Rob Connell

WHAT'S A CHARITY CHILD?

Adopting a charity as an extra "child"

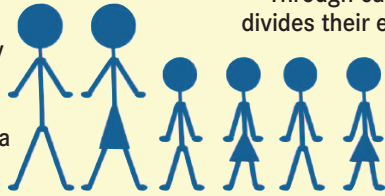
Margaret has been retired for many years. She has four children, and a number of grandchildren, and she wants to remember them appropriately in her will.

But Margaret has also been a life-long supporter of her church, and other charitable causes. She wants to be sure that these worthwhile institutions also benefit from her estate.

She has chosen to adopt the "Charity Child" concept when creating her legacy – Margaret has divided her estate five ways, treating her favourite charities as a "fifth child" – a charity child. It's important to note that she has also been careful, in her will, to exempt personal mementos, and certain possessions from this arrangement, to allow some flexibility when the estate is valued. Margaret has also included a specific proviso that exempts a certain amount of cash, which is distributed directly to her grandchildren, individually.

But the bulk of the estate will be shared equally by her four children and her "charity child".

The Charity Child concept is a good way to ensure your wishes are followed immediately, and also to solve some



potential tax challenges. Most people, preparing a will, divide their estate among their immediate family. But they may not consider are the possible tax consequences to this decision.

Naming a "charity child" – charities which will be your beneficiaries – should mean that less of your estate will go to the government in taxes. That is a real concern for some, who worry that the tax burden placed on their estate will prevent their children from inheriting all that they should.

Including a "Charity Child" could be of real benefit to those who are interested in providing for their loved ones, leaving a legacy to their community and limiting their estate to the exposure of estate taxes.

Here's another example:

Through careful estate planning a family with three children divides their estate into quarters, leaving the last quarter to go to not-for-profits or charities that have touched their lives. Upon the passing of both parents, the Will outlines that each child will receive one quarter of their parent's estate. The fourth quarter is dedicated to the Charity Child and directed to the causes that are dearest to their hearts.

By placing a charitable bequest in one's Will, the estate will benefit and receive a charitable tax receipt for the gift. This will help to offset any taxes payable to the government. The children will still receive the portion of the estate generously left for them as well. It is also very important that the children can celebrate their parent's legacy of making a difference in the community through their philanthropic dreams. *Adapted by Exchange Magazine*

unique method of conservation that is getting a lot of attention: "To keep lands intact in perpetuity requires something different than putting fences around them. At *rare*, conservation is based on three fundamental principles: 1) undertake research to further the science that will result in best practices for use around the world; 2) train the next generation of conservationists who will perpetuate these values; and 3) create an entire community of support for them and for conservation goals."

Connell explains that KPMG in Waterloo has chosen to focus on fighting poverty and homelessness, supporting disadvantaged youth, and sustainability. "Obviously *rare* is a good fit for the sustainable aspect alone, but their Every Child Outdoors program supports development of children and the *rare* community gardens and research efforts strike at the roots of poverty. Looking for an organization whose goals mirror our own, we find that *rare* fits the bill beautifully."

Among the other Corporations for Conservation are BNY Mellon (Toronto); Fiix (formerly Maintenance Assistant Inc., Toronto); KPMG (Waterloo); Langdon Hall (Cambridge);

Pearle Hospitality/Cambridge Mill (Cambridge); Union Gas, an Enbridge Company (Waterloo); WalterFedy (Kitchener).

This growing list of companies joins with over 2,000 donors to *rare*, and hundreds of volunteers, resulting in growing programs and an investment in this region of over \$26 million, and counting.

Sobek-Swant emphasizes that It has always taken the whole community to ensure that *rare's* motto — intact in perpetuity — will also be a promise kept. She points to the *rare*

"...we support organizations that are well managed and fiscally responsible, with good governance, a strong management team and a healthy slate of directors and advisors who are visibly working with the organization. At the end of the day, we are looking for an ROI for *rare* with our money. Not an ROI to KPMG, but for *rare* to leverage KPMG donations and use them to raise more money."

- KPMG Partner, Rob Connell

sites initiative that brings together like-minded organizations and individuals under the *rare* umbrella with the goal to protect more land in the Grand River Watershed and surrounding areas. "It's truly a collaborative, engagement-building effort. Specifically, we are working towards a community-based land securement strategy taking advantage of technology for such things as mapping but also for broad-based grassroots fundraising in support of local land securement." - Joy Roberts

X

MAKING THE MOST OF YOUR INVESTMENT FOR YOUR CHARITY OF CHOICE

Even wise investors don't always consider what happens after they make money. "Every Canadian should be more informed of the option to benefit a charitable cause upon liquidating an asset," says Cambridge Memorial Hospital Foundation Board Chair, Surekha Shenoy. "Average people could make a much greater impact by redirecting more of their investment earnings to charity."

Shenoy cites her friend Jane, as a perfect example. Jane recently sold a long-time business interest. She wanted to do something meaningful with the funds, perhaps in memory of a family member, but was unsure how it would affect her taxes. After speaking with a number of her favourite charities, including the Cambridge Memorial Hospital Foundation, she learned that if she chose to make a donation in the same tax year that she sold her business, the donation receipt could help to offset capital gains.

More importantly, she could assist the charities that she was passionate about, by making a one-time investment that was more significant. She could also choose to honour someone who was very dear to the family, by making the gift in memory of them. As a former nurse, a gift to the Hospital Foundation seemed to be a good fit for her and her family.

Shenoy is grateful that she could recommend a timely option for her friend, but she wonders how many others remain unaware. Part of her message to the community during her volunteer role as Chair is to inform as many people

as possible about the various gift options that have benefits on many levels.

The concept of making a planned gift to your charity of choice in your estate is another example, and one that Shenoy has personally committed to. "Many people are not in a position to give a large amount during their lifetime, but as part of their estate, almost anyone can plan for a significant donation." Some people may have heard the term 'charity child' – one leaves a specific or residual amount of their estate to their favourite charity(s), in addition to money designated to children or relatives.

"This was a perfect option for my family, as we have many financial commitments at the present time. I feel confident that I am providing for future needs of the hospital, for many generations of patients including my friends and family." Shenoy also noted how appreciative the Hospital Foundation was to be notified about her planned gift commitment in advance. This allows staff to create a relationship with the future donor and offer appropriate gratitude, as well as discuss possible named recognition within the hospital.

Giving to a charitable cause is a personal decision, but Shenoy feels that we can all be more informed about available options. Anyone can have a tremendous impact, with just a little planning.

For information, (519) 740-4966 or cmhfoundation.ca.



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Sue Lockett, Director of Development, 519-740-4966
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TRUMP'S CRACKDOWN ON IMMIGRATION

Can Canadian employers get business done south of the border?

BY JULIA KLANN

On January 27, President Trump signed an executive order banning entry to the US for individuals who are citizens or nationals of one of several Muslim-majority countries. Although this order was put on hold by the courts, this order created confusion about who can enter the US. In light of the budget proposals outlined by the President in mid-March, one can assume that the clampdown on US immigration will continue.

As is typical with a new administration, Trump released a mini or "skinny" budget in mid-March, with the promise of a formal budget in May. The first Trump budget blueprint referenced only discretionary spending items and contained no mention of tax reform. What the budget shows is that Trump is holding true to campaign promises such as funding for a wall between the US and Mexico and increased funding to the Department of Homeland Security. The budget includes funds to hire more Border, Immigration and Customs Enforcement officials.

What does this all mean for Canadian employees crossing the border for employment purposes? In short, now is not the time for non-compliance with immigration or tax laws as an employer sending employees to the US or employees travelling to the US on behalf of their employers.

What many Canadian businesses may not realize, is that almost any US based activity – attending trade shows, visiting customer locations, holding sales meetings or sourcing product, are considered US based services for purposes of determining if employees are earning employment income from US sources.

It is these activities that can create tax obligations for employees of Canadian businesses, and potentially their employers. Although the employees themselves are typically not subject to US federal income tax for their US activities, penalties can be imposed for non-compliance for disclosure of such US based workdays to the IRS.

In addition, the Customs and Border Protection Agency can pull taxpayer records as part of the US admissions process. Employees crossing the border to perform services in the US should ensure that they have completed all requisite US tax filings. Employers can assist by seeking tax and immigration advice for those employees that are spending time south of the border. At a minimum, proper visa documentation is essential when crossing into the US states.

Although the travel ban has been lifted, all visitors to the US have the burden of proof to establish that they are admissible to the US; therefore, one should continue to expect more questions at the border,

regardless of race or religion. All individuals, whether entering the US using a US, Canadian or other foreign passport, would be advised to ensure that they have proper documentation to present to border officials when travelling to the US. Canadian businesses sending employees crossing the border should ensure that their employees have met with an immigration lawyer and have been cleared for travel from a legal perspective.

The added complication for employees crossing the border is that the state rules differ significantly from the federal rules. An employee spending time in the US may also create a state tax exposure for themselves and their employers. Most states have differing thresholds for when an out-of-state employer is required to withhold and remit payroll on behalf of their employees. These differing thresholds are the source of much confusion and frustration for US and foreign employers alike.

One piece of federal legislation that is likely to hold favour for Canadian businesses that have US based travel, is the Mobile Workforce State Income Tax Simplification Act. If enacted, the law would limit a state's ability to require withholding and remittance of individual taxes unless certain criteria are met.

This would create some uniformity in state payroll rules and regulations with respect to when an employer is subject to withhold state tax for employee activity in a particular state. However, this legislation is still in very early stages as the House and Senate still need to take action on this bill. One cannot predict if and when this legislation will become law.

In the meantime, I would advise Canadian businesses to focus on US federal immigration and individual tax compliance while the US, and the rest of the world, awaits Trump's full budget in May.

Julia Klann is the leader of KPMG's US & Cross Border tax group. She has over 10 years' experience assisting both corporate and personal clients with US and cross-border tax issues. Julia is a Canadian trained CPA, CA. Julia also holds her US CPA designation and a Master of Science in Taxation from Golden Gate University.



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FINDING THE RIGHT OPTION FOR YOU

Exchange narrows down the options in simple speak

There are many benefits to charitable giving, from the satisfaction of giving back to the community and helping those in need, to the tax credits that can provide significant tax relief during your lifetime and minimize future taxes payable by your estate. Whatever your objective, choosing to support a charity is an important and personal decision that helps not only the charity you choose to support, but you as well.

The Canadian government provides a number of tax incentives designed to

encourage charitable donations. Capital gains tax on the donation of publicly listed securities to qualified donees has been eliminated. Individuals are also rewarded for charitable giving through federal non-refund-

The first \$200 you donate to a registered charity is eligible for a federal tax credit of 15% of the donation amount, increasing to 29% for donation amounts over \$200.

able tax credits. The first \$200 you donate to a registered charity is eligible for a federal tax credit of 15% of the donation amount, increasing to 29% for donation amounts over \$200.

The maximum total charitable donation eligible for a tax credit is 75% of your net income for the tax year in which the gift is made. Unused donations credits may be carried forward for five years. Married spouses or common law partners can combine charitable donations, regardless of whose name appears on the tax receipt.

The federal tax credit rules and limits may not apply in all situations. Detailed information on tax rules can be found on the Canada Revenue Agency website (<http://www.cra-arc.gc.ca/chrts-gvng/dnrs/menu-eng.html>).

There are many kinds of charitable gifts, each with advantages and tax implications.

Cash Gifts: One of the most common charitable gifts, and an easy option for Canadians who would like to make a small donation to charity.

A Gift by Will: A cash gift may not be the best solution for those who would like to donate a larger amount, leave a lasting legacy or provide guidance as to how their gift will be used. A charitable bequest (cash or property) allows you to support the charity of your choice while providing for your own financial

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needs during your lifetime. In this case, your estate will receive a tax receipt for the amount donated, and may claim charitable donations of up to 100 per cent of your net income in the year of death.

Designate a Charity as Beneficiary of a Registered Account: RRSPs and RRIAs may be donated directly to charity through a beneficiary designation on the account, or through your will.

In-Kind Donation of Stocks, Bonds and Other Publicly Listed Securities: As a result of specific tax regulations in this case, it may be more beneficial to donate qualifying securities directly to charity than to sell the property and donate the proceeds.

A Gift of Certified Canadian Cultural or Ecological Property: If you have significant works of art or historical items, you can donate the property to a museum or gallery to take advantage of available tax credits; you can claim credit up to fair market value.

Donate a Life Insurance Policy:

The taxation of life insurance products involves numerous rules and exceptions, making it a particularly complex topic, but if you are interested in making a large donation at a relatively small cost, donating a life insurance policy to charity may be an option.

Charitable Gift

Annuity: This may be an attractive option for those who are concerned

about out-living their capital, but want to support a charity. Transfer cash to a charity, which in turn purchases an annuity from an insurance company.

Set Up a Charitable Remainder Trust: This may be an ideal option for individuals over the age of 80 who would like to make a charitable donation to take advantage of the tax benefits without jeopardizing their exiting income. (Adapted from a report prepared by CIBC Wood Gundy)



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To learn more please visit: www.conestogac.on.ca/giving

Or contact the Advancement Office at 519-748-5220 ext. 3285 or giving@conestoga.on.ca

Welcome to the 2017 Charitable Gift Giving Guide produced in collaboration with the Canadian Association of Gift Planners (CAGP) and Exchange Magazine. The purpose of the CAGP is to support philanthropy by fostering the development and growth of gift planning in Canada. The Waterloo-Wellington Leave A Legacy program works hand in hand with professional advisors in will and estate planning as well as with charities to encourage well planned and managed charitable giving. You can make a difference in the lives that follow with just a little planning today. For more information please visit leavealegacy.ca.

Darren Sweeney CFP, CHS, CEA
Certified Financial Planner Professional &
2017 Leave A Legacy Waterloo-Wellington Chair,
Canadian Association of Gift Planners



Abundance Canada

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robv@csservices.ca | 800-267-8890

www.csservices.ca

Durham and Community Health Care Foundation

368 College St N. P.O. Box 1407 | Durham | ON | N0G 1R0

Anne Marie Watson, Foundation Coordinator

amwatson@sbghc.on.ca | 519-369-2340 | www.durhamfoundation.ca

Grand River Hospital Foundation

835 King Street West | Kitchener | ON | N2G 1G3

Betty Miller, Leadership & planned Gifts

betty.miller@grhosp.on.ca | 519-749-4300 x 2378 | www.grhf.org



COMMUNITY SUPPORT CONNECTIONS - MEALS ON WHEELS AND MORE:

We believe everyone should be able to live in their own home. We work with hundreds of volunteers to serve thousands of

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Dale Howatt, Executive Director | 61 Woolwich Street North, Breslau
 On N0B 1M0 | 519-772-8787
www.communitysupportconnections.org

Grey Bruce Health Services

1800 8th St E | Owen Sound | ON | N4K 6M9

Jennifer Wright, Philanthropy Officer

jenwright@gbhs.on.ca | 519-376-2121 ext. 2205 | www.gbhs.on.ca



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FAMILY & CHILDREN'S SERVICES OF THE WATERLOO REGION is committed to building

relationships with families and communities for the well-being and safety of children and youth. Our focus on in-home, early intervention services – including counselling, parenting programs, substance abuse treatment and more – means 97% of the families we work with get the help they need to care safely for their children at home. Early intervention can reduce the need for more intrusive services later and helps children flourish in a caring family setting. The Family & Children's Services Foundation supports programs and services, not covered through government funding, to help children and families heal, learn and grow.

Deborah Barton, Manager of Development and Community Relations
 200 Ardelt Avenue Kitchener ON | N2C 2L9

(519) 576-0540 x3453 | deborah.barton@facswaterloo.org
www.facswaterloo.org



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To extend your hand of friendship to those in need in the future, consider a gift to The Friendship Fund

endowment (1995) in support of House of Friendship's (HOF) community outreach. Founded in 1939, HOF annually serves over 42,000 neighbours living on low-income. We are there when needed with food, shelter and housing, speaking up on poverty issues, and working together to build a healthy community where all can belong and thrive. We may not be able to eradicate poverty overnight, but together, we can continue to comfort and support those-in-need when it matters most. For more information, please contact:

Marilyn Jacobi, marilynj@houseoffriendship.org 519-742-8327 x133

51 Charles Street East, Kitchener, ON N2G 2P3
www.houseoffriendship.org

Hospice Wellington

795 Scottsdale Drive | Guelph | ON | N1G 3R8

Beverly Trist-Stewart, Campaign Manager

tristbev07@gmail.com | 519-836-2154 | www.hospicewellington.org

Kitchener-Waterloo Humane Society

250 Riverbend Drive | Kitchener | ON | N2B 2E9

Marjorie Brown, Development Director

marjorie.brown@kwhumane.com | 519-745-5615 x229
www.kwhumane.com

Owen Sound Regional Hospital Foundation

"Box 1001, 1800 8th Street E" | Owen Sound | ON | N4K 6H6
Willard Vanderploeg, Development Officer
wvanderploeg@oshfoundation.ca | 519-372-3925
www.oshfoundation.ca


KidsAbility:

Your legacy can take many forms. However, none may be as important as providing a gift to enrich the lives of children and youth with special needs. Last year, KidsAbility provided life-changing therapy and support services to over 6,300

children. Yet we also had 828 children on a waiting list. Your legacy gift can change that by giving local children hope and a brighter future.

Heather Curran, Senior Development Officer | hcurran@kidsability.ca
500 Hallmark Drive, Waterloo, ON | N2K 3P5
519.886.8886 x1399 | www.kidsability.ca


KW Counselling Services

KW Counselling Services is a multiservice agency offering counselling supports to individuals, couples and

families in the Waterloo Region. Our Walk In Counselling Clinic is open each Thursday from noon-6pm. In addition to our counselling work we offer a variety of parenting education workshops (Parenting with Passion), leadership training for members of the multicultural community and outreach support for low-income families, newcomers to Canada and the LGBTQ+ community (OK2BME). We are proud to have been supporting children, youth and families in this community since 1950.

Leslie Josling, Executive Director,
480 Charles Street, East Kitchener, ON N2G 4K5
519.884.0000, info@kwcounselling.com
www.kwcounselling.com



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Dan Driedger, Executive Director ddriedger@mennohomes.com
226-476-2535

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www.mennohomes.com


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Nutrition for Learning distributes fresh fruits, vegetables and nourishments to elementary and secondary Public, Catholic and French schools in Waterloo Region. Each of these nutrition

programs helps provide nourishments, fight hunger and obesity and encourages the adoption of healthy lifestyles by our students that would impact on their individual health and learning abilities. All meals and food products fall within very strict government health guidelines.

495 Waydom Drive Unit 2, Ayr, ON N0B 1E0
519-624-5744
www.nutritionforlearning.ca

Saint Luke's Place Foundation
Cambridge, ON, N3C 3P4

Alison Haddaway, Director of development
foundation@saintlukesplace.ca | 519-658-5183 |
www.saintlukesplace.ca

Shore Centre:

Lyndsey Butcher, Director
130-235 King Street East | Kitchener, ON. | N2G 4N5
director@shorecentre.ca | 519 743 9360
www.shorecentre.ca


SUNBEAM CENTRE:

Since its modest beginnings in 1966, Sunbeam Centre has evolved into a multi-faceted organization supporting more than two thousand individuals

and their families across three distinct areas of focus: The first area is 24/7 residential care for individuals with developmental disabilities and medical challenges. Along with this 24/7 care, Sunbeam also offers out-of-home respite and day program supports. The second area of focus is Developmental Services Ontario (DSO) – Central West Region. DSO is the "gateway" into adult developmental services. Sunbeam is responsible for providing this service in Waterloo, Wellington, Halton, Peel and Dufferin. The third and final area of focus is the Developmental Services Resource Centre (DSRC), which serves the Region of Waterloo. DSRC provides family support, service coordination, speech, language and behavioural supports and health care consulting.

Bob Butella | b.butella@sunbeamcentre.com
2749 Kingsway Drive | Kitchener | N2C 1A7
519.893.6200
www.sunbeamcentre.com

Stratford Festival

55 Queen St. | Stratford | ON | N5A 6V2
Kathryn McKie, Planned Giving Manager
kmckie@stratfordfestival.ca | 519-271-0055 x 5640 |
www.stratfordfestival.ca

United Way of Waterloo Region

Cambridge Location
102-135 Thompson Drive | Cambridge | ON | N1T 2E4
Jen Langdon, Individual Giving Officer
jen@uwcambbridge.on.ca | 519-621-1030 | www.uwcambbridge.on.ca

Waterloo location
801-20 Erb Street West | Waterloo | ON | N2L 1T2
Lucie Stuart-Burton, "Manager, Individual Giving"
lstuart-burton@uwaykw.org | 519-88-6100 x265 | www.uwaykw.org

University of Waterloo

200 University Avenue W. | Waterloo | ON | N2L 3G1
Sharon McKay-Todd, "Associate Director, Planned Giving"
smckaytodd@uwaterloo.ca | 519-888-4567 x35413
Joanne Stewart, "Development Officer, Planned Giving"
jm4stewa@uwaterloo.ca | 519-888-4567 x37040
www.uwaterloo.ca

Wilfrid Laurier University

75 University Ave. West | Waterloo | ON | N2L 3C5
Cecile Joyal, "Development Officer, Individual & Planned Giving"
cjoyal@wlu.ca | 519-884-0710 x3864 | www.wlu.ca

YMCA Kitchener-Waterloo

153 Frederick St. | Kitchener | ON | N2H 2M2
Jessica Wroblewski, "Manager, Major Gifts & Planned Giving"
jessica.wroblewski@ywcakw.on.ca | 5519-576-8856 x110 |
www.ywcakw.on.ca

DONATING STOCK OPTIONS, PUBLICLY TRADED SHARES AND PRIVATE COMPANY SHARES CAN BE A WINNING STRATEGY

BY SHERRI GROSZ, GIFT PLANNING CONSULTANT AT ABUNDANCE CANADA

Canada has some of the most generous donation rules in the world. Many Canadians are aware of the ways they can donate cash or donate online to their favourite charities. However, fewer people are aware of the ways they can donate assets. Donating assets can be an attractive way to make larger donations.

Before proceeding or initiating any transaction, donors are encouraged to seek independent advice from their professional advisors. While Abundance Canada regularly receives donations of private company shares and employee stock options, each situation is unique and requires assessment by your professional advisors to determine if it might be right for you. The examples in this article may not apply to your situation.

Donating employee stock options

Some employees receive stock options. These are a taxable benefit if the value of the shares at the time you exercise your option is higher than your exercise price (the price which you must pay for the shares). You may also be entitled to a tax deduction of 50% of this benefit if certain conditions are met. Generally, the outcome of donating the proceeds within 30 days of exercising your stock options could include:

- The usual deduction for 50% of the stock option benefit,
- An additional deduction for the remaining 50% of the benefit (so that the benefit now becomes tax free), and
- A donation tax credit for the value you donate to charity.

Donating QSBC preferred shares

Your business may be a Qualified Small Business Corporation. As a shareholder, you could donate preferred shares to a Canadian charity. This strategy is particularly appealing for a business succession plan where an existing shareholder wishes to divest him- or herself of existing shares, make a gift to charity, and the corporation or existing shareholders want to retain control of those

shares. There may be tax advantages to donating private company shares to charity.

If you wish to include charitable donations as part of your business succession plan, speak to your advisors as early as possible so they can include that as part of the overall succession plan.

Individuals donating publicly traded securities

In 2006, the federal government implemented tax rules that make it very attractive to donate appreciated publicly traded securities such as stocks, mutual funds or bonds that are held in a non-registered investment account. These benefits are not available to securities held in registered accounts (RRSP, RRIF).

If you choose to sell the appreciated securities, you would incur a taxable capital gain. However, if you donate the securities (in-kind) to a charity, you avoid the taxable





capital gain and receive a charitable receipt for the market value of the securities you've donated. The charitable receipt can then be claimed on your income tax return.

Corporations donating publicly traded securities

A corporation, such as a holding company, can benefit from donating publicly traded securities in-kind to a charity. There are additional tax considerations, so it is important to discuss this with your professional advisors to determine if it applies to your situation and when to do it.

Donations from the sale or transfer of qualified farm property

The sale or transfer of Qualified Farm Property may generate a tax liability. A cash donation to charity could provide tax relief. If the farm is a corporation, there may be tax advantages to donating shares of the corporation to charity. The charity sells those shares to the new owner(s). The sale or transfer of

QFP can be complicated from a tax perspective. Consulting with a professional tax advisor is highly recommended.

If you decide to proceed with any of the charitable strategies listed above, you may wish to use a donor-advised public charitable foundation. This may be the right choice if:

- This is a larger-than-normal charitable donation and you would like some time to determine which charities should ultimately benefit.
- The charities you want to benefit do not have the expertise or ability to process these gifts.
- You require a charitable receipt in a particular year for tax purposes and want to distribute funds in a future year or years.
- You prefer to receive a single charitable receipt rather than making multiple donations to different charities.
- You wish your charitable gifts to be anonymous to the recipient charity.

• You are contemplating creating your own private foundation but want to avoid the setup and ongoing administrative costs and effort.

Not all charitable foundations offer the same options, so be sure to shop around. Some charitable foundations may require you to lock in the donated amount for a specified period of time. Others restrict the number of charities to which you can disburse funds or how often disbursements can occur.

Abundance Canada would like to help you support the charities you care about by facilitating your in-kind donations.

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Sherri Grosz, CFP®, is a gift planning consultant at Abundance Canada, a faith-driven charitable foundation providing gift planning services for all Canadians who choose to experience faithful, joyful giving. For more information, call 519-745-7821 or visit abundance.ca.



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BRIDGES TO ABILITY: A NATURAL EXTENSION IN SUPPORTING YOUR MOST TREASURED INTERESTS

Like so many others that rely on KidsAbility to support their children, the Bridge family looks to all the positive experiences.

The first time Cindy Bridge and her family came to KidsAbility, they realized that they had come to a special place. During the years that followed, the centre would become an important part of the life of her family as they raised their son, who was born with spina bifida.

The Bridge family became regular users of the facilities and wonderful services and treatment that KidsAbility provides. Cindy also became a volunteer, an advocate and a donor to help support the important, life-changing work that KidsAbility offers.

Looking back, it was that first appointment at KidsAbility that made all the difference. "One of the most important moments at KidsAbility was our initial appointment to meet and talk to parents in the same situation as we were in," says Cindy. "Our family always felt welcome and comfortable. I believe that we are very fortunate having this resource in our community."

That is why Cindy has created a legacy gift in her will for the future benefit of KidsAbility. "By creating a legacy as a future donation to the centre, we will be helping others to benefit from KidsAbility the way our family has."

Cindy found that, once she had ensured that her loved ones had been cared for through her estate plan, creating this kind of gift in her will for KidsAbility was easy to do. It was also a very natural extension of the support she and her family had already been giving to help ensure that KidsAbility had the resources to fund its work with children

in the communities it serves. This includes Cindy serving for nine years on the Foundation's Board as well as serving as Co-Chair of the Endowment Fund Committee.

"During our lives we have always done our utmost to help this very necessary facility," says Cindy. "For us, there was no doubt about leaving this type of gift. We wanted to ensure we provided a gift through our will to support the future of KidsAbility."

Like so many others who rely on KidsAbility to support their children, Cindy and her family look to all the positive experiences with KidsAbility that have helped to shape their family's future. Their vision is for the centre to be ready when another family requires its important services.

"We feel great comfort having this facility in our community," says Cindy. "We received the care for our son when we needed it most. I would like to see any family in a situation similar to ours, receive immediate care, treatment and guidance."

Because of donors like Cindy, KidsAbility will continue to make that possible, well into the future.

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St. Mary's General Hospital is depended on 24 hours a day, seven days a week to provide quality medical care for our community.

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Lifesaving care is not 100% covered by Ontario's healthcare funding model. Through contributions to the St. Mary's General Hospital Foundation, our community must finance the on-going purchase of all new and replacement equipment required for patient care.

Be a part of ensuring that the advanced care of St. Mary's is available to the residents of Waterloo Region when they need it. **Contribute your talents to the St. Mary's General Hospital Foundation Board of Directors.**

Board members support the mission of the Foundation and are responsible for its governance, stability, and success. With a Board committed to fundraising excellence, the Foundation can support the needs of the community.

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*Michael Dye, Chair Governance Committee
St. Mary's General Hospital Foundation
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Only those applications being selected for an interview will be contacted.

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LUTHERWOOD SUPPORTED FROM THE OUTSET BY STRASSBURGER



Bob, Lori, Kim and Dana Strassburger with Donna Buchan and John Colangeli of Lutherwood.

Strassburger Windows and Doors, a Kitchener company originating in 1949, has been actively supporting charitable organizations in the region for many decades.

Lutherwood is one organization that has expressed deep gratitude for its “special relationship” with the Strassburger company. Strassburger, a founding partner of the agency, has supported Lutherwood for almost 50 years.

Lutherwood and Strassburger Windows and Doors share a mutual respect of each other's organizations and the people who work for them. In 2010, Dennis Strassburger, Co-President of Strassburger Windows and Doors, died suddenly of a heart attack.

Lutherwood's leaders decided to honour his memory: “Dennis was a special man who raised the spirits of people around him through his joyful personality and humour. Dennis held a special place in his heart for the kids served by Lutherwood. In his honour, Lutherwood created a special gathering place – Denny's Café, a hub of activity for the youth with serious mental health challenges who live, learn and heal at Lutherwood. It is a place for children, families, staff and guests to gather over a coffee or a warm bowl of soup.”

On September 11, 2017, Strassburger Windows and Doors will organize

and host the seventh annual Dennis Strassburger Memorial Golf Tournament to support Denny's Café at Lutherwood. The tournament has now raised almost \$250,000.

Lutherwood is not the only organi-



<http://www.strassburger.net/golf-tournament-save-the-date-2017/>

zation to benefit from the generosity of Strassburger Windows and Doors; the company has supported many charitable organizations in the KW area, including Strong Start, The Working Centre, Family and Children's Services of Waterloo Region, Community Support Connections, the Rotary Club of Kitchener Conestoga, House of Friendship, Big Brothers Big Sisters, Habitat for Humanity Waterloo Region, The Foodbank of Waterloo Region, KidsAbility, HopeSpring, The United Way, Anselma House, Haven House, and Drayton Entertainment.

They have supported mentoring programs for kids, helped build a kitchen to create subsidized meals, bought numerous turkeys for hungry families, helped build homes for fami-

lies and donated many, many windows and doors.

The Strassburger business began in 1949, when Morgan Strassburger Sr. started a roofing business out of a three-bedroom home, with a pickup truck and one employee. The company (which quickly outgrew the family home) evolved to offer many products and services including insulation, siding, awnings, and hardware. In 1984 Strassburger made their first vinyl window and since then has focused on building world-class fenestration products.

Over the years five sons joined the family business: Morgan Jr., Albert, Bob, Cliff and Dennis. Today, Bob is the President and the next generation of Strassburgers are part of the business team

Morgan Strassburger Jr. recalls that he and his father were approached by Lutherwood to help build a residence for troubled boys in 1967. They offered their support. As the company grew, so did their giving.

Bob Strassburger recalls that his Dad, despite having the large family and a growing business, always helped when he could. Bob believes that his local family business is in a good position to help the community be better and stronger through investing in charitable organizations.

The over 90 staff of Strassburger Windows and Doors are proud to be part of a company that gives back so much. According to Gail Turner, Office Administrator, “it feels good for the employees to get involved in the many company events that support the charities. As an individual we can only do so much. But when we are part of the Strassburger giving team our impact is much more powerful”.

Lutherwood is a key child and youth mental health, employment, and housing support service provider in Waterloo Region. Since its inception in 1970, Lutherwood has grown to be a multi-service organization with over 400 staff serving more than 16,600 people annually. Every year over 100 youth ages 12-18 receive treatment for their complex mental health challenges at Lutherwood's Children's Mental Health Centre in Waterloo.

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PHILANTHROPISTS WHO ARE MAKING AN IMPACT EARLY IN THEIR CAREERS

Whether it's serving on the Board of Governors, planning a fundraiser or advising on projects, here are five individuals brought together by their passion for supporting their local hospital.



Jeff Horst and Seth Jutzi

Jeff Horst explains, "We all need the hospital at some point in our life." Jeff, Co-Founder of the digital marketing firm, echosims inc., has been part of the Foundation family for over four years. As a Board Member and Co-Chair of the Marketing and Communications Committee, Jeff brings a savvy to digital fundraising and reaching out to a younger demographic. In the early years of starting their company, he saw the impact of local business owners giving back to the community and wanted to do his part. A mentor suggested he get involved with the Foundation.

When Jeff's family underwent a health crisis two years ago, he experienced the hospital up close. Through that difficult time, he appreciated the exceptional care the staff provided. "Even today, I still learn more about Grand River Hospital and the health care system. Our hospital really is a leader and there is so much to share."

The Foundation's champions help spread the message about the impact of Grand River Hospital. For years Kris Ronan supported the Foundation by attending events, but he decided to do more. Intrigue Media, a marketing and video advertising agency where Kris is Partner, has expanded from its roots in Guelph to the hub of technology in KW. When asked what drew him to volunteering with Grand River Hospital Foundation, Kris says he was particularly intrigued by the advancements in research and programs for patients' support.

Although busy building Intrigue Media, Kris has joined two signature event committees, ready to help with sponsorships, guest participation and strategies to market the events and tell stories to inspire donations.

To ensure the Foundation is a high performing organization, the Board of Governors of Grand River Hospital Foundation has recruited members with diverse professional backgrounds.

Seth Jutzi is a lawyer with Sorbara, Schumacher and McCann LLP and Chair-Elect of the Grand River Hospital Foundation

Jeff Horst, Kris Ronan, Seth Jutzi, Nikki Weiler and Monica Caudle are Grand River Hospital Foundation volunteers and supporters. All have a story to tell about why giving back to health care and Grand River Hospital is important to them.

Governance Committee. Seth joined the Board for very personal reasons: his mother receives dialysis in the Grand River Hospital renal program. Seth understands his legal expertise directly benefits the physicians and staff who care for his mother. Seth says his mother's care team is incredible.

For those considering volunteering Seth advises, "Use the skills you've gained in your professional life and apply them to something you're passionate about. Find a cause and an organization that matters to you."

To celebrate their grand opening on Belmont Avenue in 2012, Janet Lynn's Bistro (JLB) owner Kevin Wong and junior partner Nikki Weiler hosted a Mix and Mingle fundraiser for the Grand River Regional Cancer Centre, in memory of Janet Lynn Leslie. They thought it would be a one-time event, but four years later the spring gathering of JLB's local clients has grown, and has raised a lot of money.

Nikki puts her dynamic personality to work in getting suppli-



Monica Caudle, Kris Ronan and Nikki Weiler

ers to make donations, clients to attend and donate and raise awareness about the impact this fundraiser has for thousands of cancer patients in Waterloo Wellington. "We all know people with cancer and we can all do something for the cancer centre to support them. It's hard work, but I feel so good when everyone is in the restaurant visiting, laughing, eating good food and drinking good wine – enjoying their life. It's what every restaurateur wants for their clients."

Every member of the Caudle family has long been involved with the Foundation. The Caudle's Catch Golf Tournament is older than Monica Caudle, who finds herself at the helm of planning the family's thirtieth anniversary charity tournament.

With a diploma in business administration and management, she is eager to apply her skills and help continue the event that has raised \$187,000 for the Grand River Hospital Foundation. "I'm looking forward to what's next and how I can give back as my career develops," Monica says, "We all need health care services and I want Grand River Hospital to be there for me and my family, our customers and our community."

The future of philanthropy is bright.

ECONOMICS PROF IS A WATERLOO WARRIORS SUPERFAN

Mary Ann Vaughan definitely qualifies as a University of Waterloo superfan. Vaughan is a professor of economics at Waterloo, and a life-long fan of the sport of hockey. She first saw a game featuring the Waterloo Warriors Men's Hockey Team in 2010 after a casual invitation from a student. This marked the beginning of an enduring, support and meaningful relationship with the team. She soon became a



Mary Ann Vaughan with award recipients Ryan Hanes (l) and Matt Amadio (r)

donor through the Adopt-a-Warrior program, and in 2014, began to contribute more significantly by creating the Mary Ann Vaughan Athletics Excellence Award for Men's Hockey.

"Mary Ann's contributions have grown year-by-year" says. Brian Bourque, Waterloo Warriors Head Coach. "The emotional support she offers, and knowing that there's someone with such deep passion for our program adds to our sense of pride, I think that's exciting."

Mary Ann Vaughan is a special person in the University of Waterloo community. She makes other people feel special, and gives in a very significant way.

Vaughan attends all home games, and more away games as she is able to. She's formed friendships with players, parents and athletics staff. In her Warriors hoodie and hat, or a custom 1974 throwback jersey, she's a supportive presence in the bleachers to team members, especially at away games.

"She sat right by our bench," remembers Warriors Captain Joe Underwood. "All the guys were talking after the warm-up that she was there. It's not very often in this league that you see a visiting team's jersey in the stands, so seeing her there was definitely a good feeling for all of us in that room. The guys always notice when she is there, and regardless of our success on the ice, she is always there cheering us on and providing her support."

The emotional support that means so much to Waterloo's student-athletes is backed by significant financial support that

has grown over the years as the relationship has deepened. Initially Vaughan contributed to clothing fundraisers that filled her office with a collection of black and gold swag. Then she sponsored players in the Warrior's annual golf tournament. Next she joined the Adopt-a-Warrior program.

In 2014, she began to contribute more significantly by creating the Mary Ann Vaughan Athletics Excellence Award for Men's Hockey, provided annually to full-time undergraduate students who are qualified student-athletes on the Waterloo inter-university men's hockey team and who are in good academic standing. Later that year, Vaughan ensured that her support would continue on indefinitely by creating an Endowed Scholarship as part of planned giving in her will.

For all that she has given, she has received much. The team has played a vital role in her life, especially since the passing of her husband David. "On many occasions," writes Vaughan, "the hockey team has come to my rescue. For example, my birthday is in November, and in 2016 it fell on a Sunday. So, I assumed I would be alone that day. When I checked my email Sunday morning, there was an invitation to lunch from two hockey players. I met them at the restaurant and they arrived with a bouquet of flowers. They saved me, and I will never forget it as long as I live ...

"I have always loved hockey and having a talented, skillful team to support would, in itself, be sufficient. But, I have been given a special level of acceptance, and at a time in my life when I need it most. Coach Bourque, his assistant coaches Nathan and Ben, the players, and the support staff are all awesome individuals. The best thing is I get to call them my friends."

Ryan Hanes, who is enrolled in Environmental Studies, was a Mary Ann Vaughan Athletics Excellence Award for Men's Hockey recipient for 2016/17. Upon receiving the award, Hanes told her, "Mary Ann, it has been an honour to have received the Mary Ann Vaughan Athletics Excellence Award, your never-ending support and dedication to the Warriors Men's Hockey team is something that I have never experienced before, and I believe I speak for the whole team when I say that it is not only welcomed, but very much appreciated. Your generous award has allowed me to do things I otherwise wouldn't have, and it has provided me with the security I need to focus on my studies and my sport. Thank you very much, Mary Ann."

Vaughan's relationship with Warriors Men's Hockey is unique, in that it is rare for a faculty member not directly involved with Athletics to offer such significant, devoted emotional and financial support to a team. Yet that spirit of giving, so beautifully demonstrated by Vaughan, lives in each of us who make contributions to support that which we hold dear – and ensures that what matters most to us will continue to flourish for years to come. *by Sharon McKay-Todd Planned Giving, Office of Advancement with files from the Imprint.*

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WLU's Max Blouw, left, and Rob Donelson unveil the new Donor Wall.

WILFRID LAURIER UNIVERSITY HAS UNVEILED an innovative donor recognition wall at the Lazaridis School of Business and Economics, featuring Christie MicroTiles technology. The tiles, invented by Christie, a Kitchener-based global audio and visual technology leader, are part of a \$1-million Christie donation to the university.

Students and visitors can use the touch-screen tiles on the five-pillared wall to learn more about donors and their contributions to Laurier's Building Canada's Best Business School campaign in support of the Lazaridis School of Business and Economics. The Christie MicroTiles feature donor profiles, a timeline of the Lazaridis School and a list of the nearly 2,500 donors who have supported the campaign so far.

"Christie is supporting the Lazaridis School because of our strong belief in its mission and to foster the next wave of highly-skilled business leaders in this community and in Canada," said Ihor Stech, Christie's chief operating officer. "Christie shares Laurier's desire to develop Canadian business education for a global economy driven by innovation and entrepreneurship."

Forge Media, a Toronto-based company and donor to the campaign, developed the design and program-

ming for the wall and its display.

"We are extremely grateful to Christie for donating this outstanding addition to Lazaridis Hall," said Max Blouw, Laurier's president and vice-chancellor. At the unveiling, he called it "An absolutely fabulous way not only to celebrate donors but also to celebrate the future."

Rob Donelson, vice-president of Development and Alumni Relations at Laurier, noted that more than \$41 million has been donated to the Lazaridis School and fundraising is continuing. He said, "We wanted to recognize our

donors to the Building Canada's Best Business School campaign, and we wanted to do it in a way that reflected the contemporary nature of this entire building. We wanted our donor wall to be state of the art... the ultimate digital canvas."

THE UNIVERSITY OF GUELPH HAS RECEIVED its single largest-ever gift, a \$20-million donation from the Arrell Family Foundation to transform the global food economy and further strengthen U of G and Canada as agri-food leaders.

"This landmark gift will allow our University to address the defining challenge of our time: food security, safety and sustainability," said U of G president Franco Vaccarino.

U of G is the No. 1 agri-food school in Canada, with a 150-year history in agriculture and a global reputation for excellence, Vaccarino said. "We are uniquely positioned to make a difference.

The donation will create the Arrell Food Institute at U of G. The University will provide matching funds of \$20 million, for a total commitment of \$40 million.

Along with recent government and private funding — including a \$77-million award from the Canada First Research Excellence Fund for the Food From Thought project — this new gift brings the total investment in agri-food at U of G to more than \$150 million in the past 12 months.

"The Arrell Food Institute will influence research, policy, practice and behaviour. It's a bold initiative, and its impacts extend nationally and globally," said Tony Arrell, a U of G alumnus, Chairman and CEO of Burgundy Asset Management in Toronto.

CONESTOGA COLLEGE HAS RECEIVED a grant of \$250,416 from the provincial government to support the delivery of free pre-apprenticeship training.

The Heavy Duty Equipment/Truck and Coach Technician pre-apprenticeship program will help 24 local trainees develop trade-specific knowledge, job skills and employment experience and fulfill Level 1 classroom training requirements for the 310T apprenticeship.

The program run at Conestoga's Guelph campus, includes 31 weeks of

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training and an 8-week work placement. It is free for eligible participants. Costs for tuition, textbooks, safety equipment and tools are covered through the provincial funding.



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KIDSWIFI HAS ANNOUNCED its intended expansion to the United Kingdom, with **Sarah, The Duchess of York**. Together, they're dedicated to spreading awareness on the constant threats children face while utilizing the Internet, and to providing parents with a simple and convenient solution to keep their children protected online.

With this new partnership and focus, the KidsWifi team is devoted to informing parents on the risks and dangers of the online world, while providing parents with an essential, easy solution for protecting children as they utilize the Internet.

As a mother, child education advocate and best-selling author, Sarah, The Duchess of York, understands all about compassion for children and wellbeing. She founded Children in Crisis in 1993, which has educated over 1.4 million children, trained over 18,000 teachers, built 57 schools and supports hundreds of schools on a yearly basis. She has shifted her focus to also include protecting children as they use the most popular place where threats exist, the Internet. "I'm excited to see KidsWifi coming to the UK. The Internet can be a dangerous place for children but KidsWifi is making it a safer and more enjoyable place for everyone."

The KidsWifi device is a simple plug-and-play Internet safety solution that launched in Canada in September of last year. The compact device protects children from negative online content, and is available to parents across North America from their online store.

CONSTRUCTION COMPANY GATEMAN-MILLOY INC. has received the national award for corporate social responsibility, the CCA Community Builder Award, at the annual Canadian Construction Association conference. CCA is the national body representing the construction industry to government and business. Gateman-Milloy received the award for its significant contribution to the Waterloo Region community and beyond over more than 35 years in business. Its efforts have included supporting such programs as: Conestoga College's Heavy Equipment Apprenticeship Program; funding an endowment for high academic achieving engineering students needing financial assistance to complete their degrees; and, the Niagara Parks Commission School of Horticulture, the company's founder and president, Michael Milloy's alma mater.

The company has also funded endowments for Wilfrid Laurier University and the Stratford Perth Community Foundation, as well as gifts in kind for Innisfree House, a palliative care hospice, and the rare Charitable Reserve. Gateman-Milloy's employees are particularly proud of their fundraising efforts for Juvenile Diabetes research, raising \$43,000 since 2013.

FLANAGAN FOODSERVICE WON its initial Best Managed award in 2013 and has successfully retained its status for four consecutive years, becoming a Gold Standard winner in 2016.

WILFRID LAURIER UNIVERSITY HAS APPOINTED Kathryn Carter as the university's associate vice-president: Teaching and Learning. Carter begins her five-year, three-month term April 1.

WATERLOO REGIONAL COUNCIL HAS APPOINTED Rosita Tse of Cambridge to the Waterloo Regional Police Services Board for the balance of the 2014 – 2018 Term of Council to fill the position left vacant due to the resignation of Jim Wideman

from the Board earlier this year. Tse has served professionally at the City of Cambridge and as Chief Financial Officer at the Township of Wilmot prior to her retirement this month. She is a certified management accountant and also serves on the Board of Governors at Renison University College.

SANDVINE HAS BEEN RECOGNIZED by Great Places to Work Canada as being one of the Best Workplaces in Canada for Women. To be eligible for this recognition, organizations had to be Great Place to Work Certified in the past



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year, have a minimum of 50 female employees, and provide a male/female breakdown by job level. Sandvine's female Team Members also had to have a minimum 90% positive response to the statement "I am treated fairly regardless of my gender," as well as demonstrate high levels of workplace trust and involvement in people programs that support women.

One of the people programs which Sandvine was recognized for is "The Women of Sandvine." Each month this group gathers for different how-to workshops and seminars from senior leaders and other professionals who offer guidance and mentorship. Topics covered at these sessions have included leadership, personal branding, powerful presentations, negotiating, healthy living, and emotional intelligence.

In addition to being one of the best workplaces for women, Sandvine has also been regularly recognized as one



Family & Children's Services of the Waterloo Region have announced the appointment of Karen Spencer as CEO. Spencer, left, replaces Alison Scott, shown at right, who retired from the position at the end of March.

of the Great Places to Work in Canada. "Sandvine is proud to be named as one of the best workplaces in Canada for women. This recognition will provide us with a unique differentiator when attracting top talent to Sandvine in both the Waterloo Region and across the globe," said **Dave Caputo**, CEO, Sandvine.

FESTIVALS AND EVENTS ONTARIO HAS NAMED the City of Guelph as its 2017 Municipality of the Year, population more than 50,000 and less than 150,000. The Award is intended for those municipalities who openly encourage and supports festival and special events within their region creating positive local environments for festivals and events within their communities. Other 2017 winners included Collingwood and Mississauga.

MOODY'S INVESTORS SERVICE HAS RATED the Region of Waterloo with the highest credit rating possible for the 17th year in a row. The Region's Aaa rating reflects prudent financial management and long-term planning as well as a proven track record of positive operating outcomes.

The top credit rating was awarded based on the following strengths: a diverse and wealthy local economy; consistent positive operating results; strong management practices; and a mature and supportive institutional framework.

ECONOMICAL INSURANCE WILL AGAIN SUPPORT the Canadian Cancer Society in 2017 with \$110,500 in presenting event sponsorships of 10 Relay For Life events in Ontario — Woodstock, two in Waterloo Region, three in the GTA, four in Ottawa in addition to an event at Quartier DIX30 in Brossard, Quebec.

"At Economical, we have proudly sponsored Relay For Life events since 2006," said Rowan Saunders, President and CEO of Economical. "This year, we continue to invest our sponsorship commitment toward the cancer cause. It is exciting to have four university events on the list of those we sponsor, allowing us to connect with a new demographic."

NINETEEN RESEARCHERS at the University of Waterloo will receive a total of \$1.4 million for infrastructure to support research. The funds are awarded through the John R. Evans Leaders Fund by the Canada Foundation for Innovation, and will provide researchers with the foundational research infrastructure necessary to lead in their field.

SUNWING AIRLINES WILL RENEW its cadet program with the University of Waterloo. Established last year, the degree program resulted in the successful hire of four graduates as First Officers by Sunwing Airlines in July 2016.

WATERLOO MAYOR DAVE JAWORSKY has announced the City of Waterloo's participation in the Canada's 150 Community Leaders network and has named to name Sheldon Pereira and Kelly McManus as the local voices for the city for Canada's 150th anniversary of Confederation.

The network will be comprised of community leaders from thousands of municipalities across Canada.


Pereira is Director of University Relations at Wilfrid Laurier University; McManus is the senior director of community relations and events at the University of Waterloo.

MARTHA GEORGE, president of the Grand Valley Construction Association, will be honoured at Conestoga College's 22nd annual Golf Classic on May 30. The event recognizes community and business leaders while raising funds for redevelopment projects at the college.

George has been a long-time supporter of the Conestoga community and served multiple terms on the college's Board of Governors. The 2017 Golf Classic will take place on May 30 at Whistle Bear Golf Club.

GEOFF LINTON, OWNER AND CEO OF INBOX MARKETER CORPORATION, has purchased the historic former King Edward Hotel in Guelph. Inbox Marketer plans to revitalize the 2 Wyndham building into a multi-use tech hub and centre of excellence bringing innovation to the heart of downtown Guelph.

The digital marketing services and technology solutions company will transform the 17,000 square feet of



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office space and will serve as the head office of Inbox Marketer Corporation which also has offices in Kitchener and Toronto.

THE SCHLEGEL - UNIVERSITY OF WATERLOO RESEARCH INSTITUTE FOR AGING has announced that Dr. Allen Power has joined the organization as Schlegel Chair in Aging and Dementia Innovation.

Dr. Power is a geriatrician, skilled educator and published author. He is internationally respected for his work challenging the use of antipsychotic medications for people living with dementia. "My work is focused on creating inclusive communities, where citizens are not segregated by cognitive ability," says Dr. Power, "I am thrilled to be joining the RIA team where I can expand this work and collaborate with top quality researchers and innovative communities like Schlegel Villages."

ATS AUTOMATION TOOLING SYSTEMS INC. ANNOUNCED THAT ANDREW HIDER has been appointed CEO of ATS. Most recently, Hider served as President and CEO of the Taylor Made Group, LLC, a diversified global leader in the supply of innovative products and systems for marine, transportation, agriculture, and construction markets. Prior to that, he served for 10 years at Danaher Corporation, a global science and technology company, including as President of Veeder Root which included a group of subsidiary companies.

As planned, current CEO Anthony Caputo has stepped down and resigned from the Board of Directors; Hider has assumed leadership of ATS.

THE SAVVAS CHAMBERLAIN FAMILY FOUNDATION and the rare Charitable Research Reserve are taking steps to ensure the future success of pollinators in Waterloo Region with the creation of The Savvas Chamberlain Family Pollinator Conservatory. As part of a \$250,000 commitment over five years to ensure *rare*, a 900+ acre land trust and environmental institute, remains intact in perpetuity, the Savvas Chamberlain Family Foundation has adopted an area at the Springbank Farm to dedicate to pollinators.

Christine Chamberlain, Vice President of the Savvas Chamberlain Family Foundation notes: "One of the objectives of our Foundation is to finance projects to preserve our local, provincial and national Canadian natural environment. We believe that preservation of our environment will benefit all sectors of our society. This project will lead to the preservation, survival and growth of pollinators in Waterloo Region."

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Centre and now in creating the new Advocacy Centre. Larkin explains the value of the programs: "The Child Witness Centre is an integral partner that focuses on the well-being of children and youth and supports them through traumatic events as well as ensuring advocacy on behalf of the child."

Larkin is frank about the challenges a child faces when they become involved in the court system. He told Exchange, "The Judicial System can be difficult to navigate and understand for an adult, let alone a young person, and the Child Witness Centre becomes a pillar of support right from the start; it travels the journey with the child while ensuring they are cared for step by step. This support reduces the tension, anxiety and trepidation as well as maintains the consistent link to the Police Service and Family and Children Services members."

And Larkin admits that having an advocate is crucial to ensure that the child is protected throughout the process. He says, "Although not intentional, often the rights of the child can be overlooked and it is the Child Witness Centre that is the key partner that ensures the protection of the child through the challenging event while providing victim care, support and an abundance of compassion."

Larkin adds, "It also provides hope for the family – that despite the significant challenges, there is hope, there is a wellness plan and the journey will not be taken alone."

The list of specific services the Child Witness Centre offers to children who are victims or witnesses of crime is quite long, ranging from educating the child on courtroom procedures and their role as a witness to scheduling and attending pre-trial meetings with the Crown Attorney to explaining the verdict and the sentence.

Muirhead sums it up: "We work with our partners in the justice system to make sure that kids have the best chance to talk about their experience. The court system can be adversarial. When the child has the chance to talk about their experience, when their voices are heard, there is a better chance to move on."

The caseworkers with the Child Witness Centre do not provide legal advice in any way – they are there to guard the interests of the child who has been caught up in the system as a victim or a witness, or a potential victim or witness.

That, by the way, is a lot of children and youth under the age of 18. Muirhead says the CWC receives between 300 and 350 new referrals annually – and because cases typically stretch over more than one year, "we're generally involved with 500-600 kids and their families in any given year."

Until the creation of the new Advocacy Centre, the CWC was doing all that work with six staff members – including the executive director (who does not do case work) and her executive assistant.

The CWC does "whatever is going to help them so they can tell their story," she says. "My caseworkers work closely with the crown and the police and the judicial process to advocate on behalf of the kids."

In practice, the caseworker's involvement can vary from a

CONTINUED ON PAGE 44



From left, Laura Muirhead of the Child Witness Centre, Police Chief Bryan Larkin, and Alison Scott, now-retired CEO of Waterloo Region Family & Children's Services – key partners in the Child and Youth Advocacy Centre.

few hours spent with a family (it's always the family's choice), to much more intensive interaction.

Even in those more time-consuming circumstances, says Muirhead, "Our caseworkers don't know the details of the case." They are not there to judge or decide right or wrong – they are there to ensure that children and young people do not suffer through their involvement with the judicial process. "They can't interfere in the court process, but our caseworker will be there to support them."

She notes that one of the most difficult stages of the process for the children can be the cross-examination, "the adversarial part of it."

So she thinks it is essential that the children have an advocate to simply be there for them. "I consider that to be a really important part of the work we do – the court accompaniment."

"The best interest of the kids – that our number one priority. It's child-focused," she says.

There are very practical means to that end. The caseworker may suggest that testimony be given in a remote testimony room, so the child does not have to be in the courtroom at all; they may also insist that a support person be present. "Whatever," says Muirhead, "is going to help them so they can tell their story."

"The Judicial System can be difficult to navigate and understand for an adult, let alone a young person, and the Child Witness Centre becomes a pillar of support right from the start." – Police Chief Bryan Larkin

She explains, "When charges are laid, they let the family know our services are available. If they consent, the police refer them to us. We reach out to the child and the family."

That, in a nutshell, describes the work of the Child Witness Centre. Muirhead is not only executive director – she is perhaps the most passionate support of her organization.

But because of her experience in her leadership role, she has recognized another significant need in the community.

The CWC was doing a very good job of advocating and supporting kids caught up as victims or witnesses in the court system, but those kids – especially those who are victims of sexual or physical abuse – were still in significant danger of being "revictimized" simply because of the complexities of the process once they came forward.

There are between 450 and 500 investigations of alleged child abuse in the region, each year.

Muirhead and her colleagues envisioned an organization that could streamline the process, that would make contact between young victims and the authorities less stressful, and would even lower the number of times a victim would have to deal with an authority figure.

Waterloo has not invented something new – Child Advocacy Centres have existed in the United States for more than

25 years; there are about 700 in all. But not, until now, in Waterloo Region.

The CWC organized discussions involving the key players, especially the police service and Family and Children's Services, and also requested and received a grant from the Department of Justice to fund an initial study. After an intensive process of consultation and collaboration, the result was the formation of the Waterloo Region Child & Youth Advocacy Centre, described as "a safe place where children and youth who disclose physical or sexual abuse as victims or witnesses can be heard, helped and healed."

Alison Scott is the recently-retired Executive Director of Family and Children's Services of Waterloo Region, one of three funding and operational partners in the new Advocacy Centre. She told Exchange that the new Centre is a result of ongoing collaboration between the key partners in the region. "We're building on a collaboration already in place, supporting children and families who have been victims of crime."

But she adds that the new element created by the Centre – the advocate – increases the focus on "the child's needs".

She points out that the FCS has always been involved in protecting the children, and the police have done the necessary investigative work, but that the advocates are "a further addition to the program... and I love that we're doing this."

Chief Larkin is clearly a fan. He told Exchange, "The benefits to Waterloo Region are immense. The Youth Advocacy Centre is a victim-centric model that focuses on children and youth. It brings together the Child Witness Centre, Family and Children Services, the Sexual Assault Treatment Centre, the Crown Attorney and Police Service into a collaborative approach aimed at supporting our most vulnerable, children and youth. All members of the Child Youth Advocacy Centre have specialized training, work in partnership and provide a welcoming environment that helps reduce re-victimization."

He sees the new service – now housed in a facility that will celebrate its grand opening later this year – as a state of the art community service. "The Child Youth Advocacy is a 'smart approach' and promotes integration while sharing resources that provide support service to special victims. Evidence demonstrates that Child Youth Advocacy Centers have a long-term impact on the wellness of the victim as well assisting the family to cope with the trauma."

He explains, "The Centre provides a wrap-around approach to victims and highlights the importance of supporting our children and youth – 20 percent of the population although 100 percent of our future."

Muirhead says the Advocacy Centre has been created "to develop a seamless, collaborative approach." The initial study into gaps in the process dealing with young victims of assault identified a gap in service, a "gap that is filled by a new role called child and youth advocate," says Muirhead.

The Child Witness Centre is the lead agency for the new Advocacy Centre. That means that, while the police service

and Family and Children's Services are funding their portion of the collaboration, including staffing, their share of rental costs, and other overhead expenses, the CWC is providing both casework staff and administration. Muirhead told Exchange that the new program has seen her staff rise from six to 14 and her annual budget increase from \$450,00 for CWC to \$1.1 million.

They have received seed funding of \$350,000 from the Department of Justice, but it is short-term, and for the first time, Muirhead is involved in a major fund-raising campaign.

The CWC has been supported by individuals and corporations since its inception – an annual pancake breakfast is a surprisingly significant generator of funds. Overall, 35% of CWC funding has come from the province, about 20% from the United Ways in the communities served by the not-for-profit, and the remainder has been raised from events and community groups. But that picture has changed significantly because the new Advocacy Centre needs a much larger level of community support.

Muirhead recruited a well-known name – Heidi Balsillie – to serve as Honourary Chair of what is dubbed the "Safe Hands Strong Futures Community Campaign." Balsillie has stated, "I am very proud to be the Honourary Chair of the

Safe Hands, Strong Futures fundraising campaign. Our goal is to raise a minimum of \$2 million to establish and sustain the new Waterloo

"Evidence demonstrates that Child Youth Advocacy Centers have a long-term impact on the wellness of the victim as well assisting the family to cope with the trauma." – Bryan Larkin

Region Child and Youth Advocacy Centre and support their ongoing work through the Child Witness Program."

The mandates of the CWC and the Advocacy Centre are quite different. The CWC serves children in Waterloo Region and Wellington County and Guelph, and deals with every kind of crime. The Advocacy Centre is focused on Waterloo Region alone, and only serves children in cases involving physical and sexual abuse.

However, Muirhead notes that her caseworkers' responsibilities at each arm of the CWC involve "the same core competencies."

After starting its life in temporary quarters – sharing space in a police station, which Muirhead admits was not ideal – the Advocacy Centre is now operating at 400 Queen Street, in a 3,000 square foot space shared by dedicated staffers from the police service, Family and Children's Services and, of course, the Child Witness Centre.

It's an important facility, and its creation means that Muirhead and her team have to change their public profile. "For years, CWC has run under the radar," she admits, but the need for public support of this crucial service means they have to go more public, making their need for support known to the community at large. "A key part of this is elevating the understanding in the community of what we do... encouraging people to join hands with us, to help create hope and empower kids on to the future they deserve."

Muirhead adds, "It's a transformative opportunity for us as a community."

A TRANSFORMATIVE OPPORTUNITY FOR US AS A COMMUNITY

The Child Witness Centre expands its service to kids, as a lead agency in Child & Youth Advocacy Centre

BY PAUL KNOWLES

Laura Muirhead

Imagine that you are a child who has witnessed a crime – or who has actually been the victim of a crime. Imagine that the crime is sexual abuse, perpetrated by a member of your family.

Now imagine the added stress of reporting that crime, and then having to deal with the unknown complexities of the judicial system – the investigation, the interviews by police and other authorities, the meetings with child protection experts, the court appearances in a completely unknown setting, and all of the high-stress circumstances that may well come your way.

Laura Muirhead did imagine all this. She was aware of situations where children had been victimized by an abuser – and then suffered through incredible trauma through the rigors of the judicial system.

"It's a difficult situation," says Muirhead. "These are kids who have been victimized... Ninety per cent of the time, the child knows the perpetrator."

If that is not trauma enough, then the child becomes

involved in the judicial system, a circumstance for which they have no precedent. "We have to be very careful not to exploit them... going to court can be a difficult situation," says Muirhead.

That's why, during the 1990s, she agreed to join the board of the Child Witness Centre and why, four years ago, after some years away from the organization, she returned as full-time executive director.

It's also why, after a couple of years in that role, she spear-headed a joint effort involving the Child Witness Centre, the Waterloo Regional Police Service, and Waterloo Region Family and Children's Services, to form the brand-new Waterloo Region Child & Youth Advocacy Centre.

For a child or a youth who is the victim of a crime, it will never be an easy road to justice – but thanks to the work of Muirhead and her colleagues, it will

definitely be a lot smoother than it once might have been.

Waterloo Regional Police Chief Bryan Larkin has collaborated with Muirhead, both concerning the Child Witness

"The court system can be adversarial. When the child has the chance to talk about their experience, when their voices are heard, there is a better chance to move on."

Laura Muirhead

A man and a woman are standing in a server room, looking at a document together. The man is holding the document. They are both smiling. The background shows rows of server racks with blue lighting. The image is reflected in a dark blue horizontal band.

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