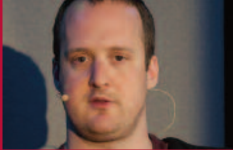

TED LIVINGSTON: DONATION FROM A UNICORN

ROB MYERS: PERIMETER PIONEER TAKES THE REINS

CARMEN EVANS: INSPIRED TO MAKE A DIFFERENCE

EXCHANGE
quarterly

MAGAZINE FOR BUSINESS, ECONOMIC DEVELOPMENT, EDUCATION & ENTREPRENEURS Vol. 36 No. 3 May 2019- $6.95

MIKE LAZARIDIS: INTELLIGENT PHILANTHROPIST

INSIDE

- Nutrition programs feed many
- Wellbeing in Waterloo Region
- Grand Innovations launches
- Strong future for Strong Start

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On the cover: Mike Lazaridis, serial intelligent philanthropist.

EXCHANGE

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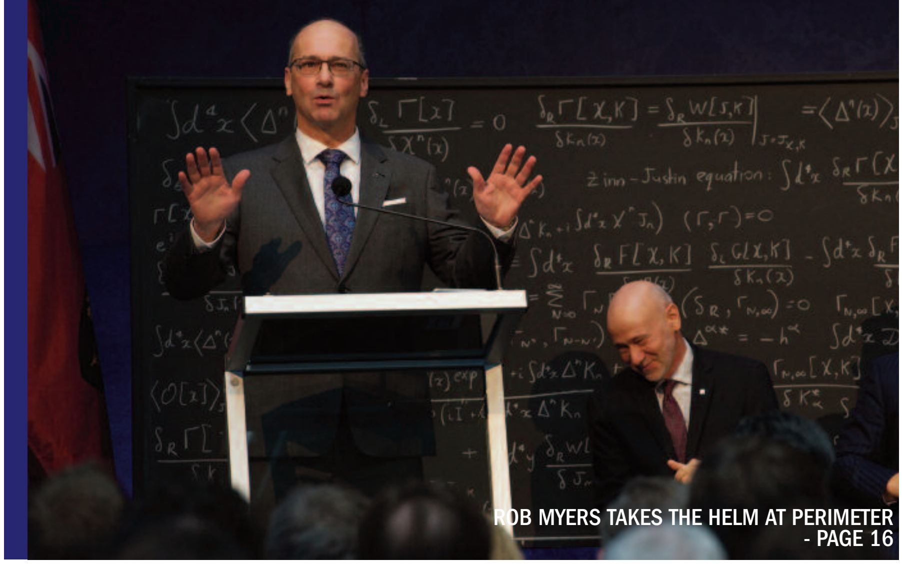

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THE BEST TIME OF THE YEAR

A magazine that truly can make a significant difference in our community.

by PAUL KNOWLES

PAUL KNOWLES is editor of Exchange Magazine.
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I am always proud of this publication, issue by issue, year by year. I’ve been involved with Exchange magazine for a very long time. And we’ve consistently done important work, covering the economic ecosystem of our unique communities.

But each year, this particular issue means just a bit more to me, because I know that this one can make the biggest difference of anything we do.

Because in this issue we don’t just focus on economic prosperity – we focus on what it means to be a genuinely successful community. We focus on “intelligent philanthropy” – people supporting other people through donations of time, money and expertise. And that’s what “community” really means.

I enjoy writing or editing the stories about successful business people like Mike Lazaridis and Ted Livingston who have figured out the importance of giving back.

But just as much, I enjoy meeting people like Judy Nairn of Hospice of Waterloo, Kelly-Sue Oberle of Food4Kids, and Machelle Denison of Strong Start, who not only work in the not for profit field... but love doing so. Their level of commitment to people who need the help of their agencies and their volunteers is absolutely inspiring.

We’re all part of this community. Many of us are prospering, but some of us are struggling. It’s nice to cover the success stories, but it’s even more important to cover the genuine community stories, the examples of how people who are doing fine reach out to help those who aren’t.

In this issue, you will meet those people, who devote their time and money to agencies created to feed, clothe, educate, comfort, support and rescue others. Where would we be without them? Hopefully, you are one of them. X

MIKE LAZARIDIS IS A CHAMPION OF INTELLIGENT PHILANTHROPY

Mike Lazaridis grows his other start-up/not-for-profit and continues to attract the funds to accelerate the path of Quantum research toward commercialized success.

BY JON ROHR

In mid-April 2019, Mike Lazaridis, the champion of intelligent philanthropy, with his business partner and child hood friend Doug Fregin, advanced yet another not-for-profit venture.

Thier creation, the Quantum Valley Ideas Lab, a not-for-profit, private public partnership (P3), announced some significant funding.

The funding announcement, came a week after Lazaridis's first major not-for-profit, the Perimeter Institute for Theoretical Physics, was globally recognized for it's contribution to the production of the first images of a black hole. That moment was a global milestone, clearly enabled by the passion of Mike Lazaridis, a passion to attract smart people to the municipality of Waterloo Region.

His contribution is undeniable, his investments continue to permit advanced level job creation. A economic development achievement major communities, many times our size, envy. Thus, maintaining Waterloo's position as a contributor, collaborator and significant player in the development of commercialized products and services growing the advanced world economy.

> "To me it's all about people," said Lazaridis. "Attract and retain the most promising people and enable their success, and big things will happen."

In a recent comment, Mike Lazaridis explained his reasons for creating and supporting quantum innovation: "With the support of industry, and private philanthropy on the one side, and the government on the other, today we celebrate the direct application of our public private partnership, for the commercialization of Quantum technologies."

It's been 20 years since Lazaridis founded Perimeter Institute For Theoretical Physics. It's been 20 years since he established its mission "to advance their understanding of the Universe at the most fundamental level, in an effort to stimulate breakthroughs that could transform our future." A mission that has been a tremendous philanthropic success.

To accomplish his dream, Lazaridis re-imaged a funding model, by establishing an endowment fund, based on contributions by his three top business partners of Research In Motion, now known as Blackberry. Since it's inception, Mike Lazaridis has put up $170 million, with Doug Fregin $25M and ex co-CEO, Jim Balsillie, $10M.

Lazaridis' fundraising model extended beyond that raised from the initial endowment, as local family businesses, value-driven foundations, and a host of vested individuals have given generously since its founding. Twenty years later, they continually see the results of their contributions and are continually recognized for their generosity for doing so. The Perimeter Institute recognizes all private donations, on their website with permission; you can find them listed on the PI website.

Mike Lazaridis, centre, with Neil Turok, left, and Michael Duschenes , at Perimeter Institute

Private donations are one source of funding; on the public side, both the Government of Canada ($142.4M) and the Ontario Government ($136.8M) have contributed to the Institute. The last contribution by either government occurred in 2011.

These numbers are significant. "Perimeter is philanthropy reimagined: philanthropy as a long-range strategic investment," says Lazaridis, who remains Perimeter's Founder and Board Chair. The institute is "deeply grateful to all our supporters".

Business's get that you have to earn the money before you can give it away. The world economy offers no realistic alternatives. Lazardis was able to re-imagined a funding model, as a result he generated some perpetual sustainability.

Like the PI, Lazaridis' passion for the Quantum Valley Ideas Lab comes after he and Fregin uncovered a needed gap. They "discovered that there was a role for a dedicated laboratory, that could help researchers get their quantum breakthroughs ready for industry." Founded with that realization, the Quantum Valley Idea's Lab was created in 2017. Designed as a not-for-profit, this quantum technology laboratory parallels that of Bell Labs. The only difference, says Lazaridis, is that it's "focused exclusively on quantum technology".

Its mission is to "establish dedicated research teams, to develop new transformative technologies that will be the basis for new products and new businesses in Canada. The ultimate goal of the ideas lab is to accelerate the path to commercializations and the fundamental advances in quantum information, quantum material and quantum sensors". It also aims to "increase the funnel of breakthrough quantum technologies that new Canadian start-ups and industry can take to global markets."

The Quantum Valley Ideas Labs first project started in January 2018. It is being led by a global leader in the field, past Dalhousie University president Richard Florizone. During the mid-April address, Lazaridis announced that the laboratory has "developed a breakthrough quantum sensor technology with applications for millimeter wave uses," citing such applications as "5G mobile, radar and autonomies vehicles".

"Doug and I started the Ideas Lab with a commitment of 20 million dollars," and in 2017 the province matched that contribution of $20 million with a pledge of support over the next five years. In mid-April of this year, federal Minister of Innovation, Science and Economic Development, Navdeep Bain, who by the way is also responsible for the Federal Economic Development Agency for Southern Ontario (FedDev Ontario), made an equal $20 million commitment. This investment will create up to 167 new skilled jobs, while maintaining 75 jobs, all in Waterloo.

Lazaridis thanked the government of Canada for their commitment, stating that "Our mission for Quantum Valley was to not

"Perimeter is philanthropy re-imagined: philanthropy as a long-range strategic investment"

only build state of the art Canadian labs, with world class researchers that can develop new and transformative quantum technologies, but to also help establish and grow exciting new Canadian businesses that will take these technologies to global markets. Our success over the past 20 years, and our traction in the commercial markets in recent years, demonstrate that this is beginning to happen. Sustained investment by the government of Canada, through efforts like these being announced today, plays a critical role in making this vision for Canada a reality."

He added, "This new capital comes at a critical time, as these companies seek to fine-tune products and technologies, close strategic customer relationships, and attract the traditional capital required for their long term success. Strategic Investment Funding (SIF) also represents an endorsement by the Government of Canada, for these companies and their technologies that helps theses companies as they continued their efforts to scale their businesses."

This is an extreme and amazing example of perpetual intelligent philanthropy given in Waterloo Region. But remember, the scale of these magnificent gifts by highly successful entrepreneurs is not designed to discourage the many of us that are less than billionaires. You don't have to be a billionaire, millionaire or have a great pension to make a difference in your community.

In reality, not every cause has a Mike Lazaridis to drive its mission. Lazaridis's philanthropy is both very calculated and very personal, and very much, doing what it set out to do, making it intelligent.

There are many other ways to give. Over the many years Exchange has been published in Waterloo Region, we have reported on a plethora of ways people have made a difference in their community. Certainly up for further discussion is the possibility that, in the world of personal and corporate philanthropy, a simple sharing of care, given at a needed time, may be more valuable to someone than the money donations made by 100 Mike Lazaridises.

There is nothing stopping you from finding your cause, and becoming that driven force to make change happen. Certainly the realization after you've earned the money, that you still have the will and that you still have the time to make-a-difference is important. Significant moments occur when an individual is triggered by a deep and transformational moment. It could have been a moment that took place some years back. In Lazaridis' situation, he says it occurred in 1982, and took place when he first read a published article, that cited "reliable proof that the world of quantum was real".

Lazaridis with Dean Micheäl Kelly at the Lazaridis School of Business

That moment occurred when he was an electrical and computing engineering student at the University of Waterloo, and in that moment his "world view was transformed". As he says, "no longer was technology and engineering limited by the rules of classical physics; what was impossible to do in classical physics suddenly became possible with quantum entanglement and superposition."

In that moment, Lazaridis path became destiny, as that moment opened a door, an put him on the path to becoming a business and financial success. This was the trigger that led to the success of RIM and the creation of Blackberry, it lead to the establishment of the Perimeter Institute of Theoretical Physics in 1999, and a host of many other QVW entities throughout the Quantum Valley area.

This area is highlighted by the buildings that now house some of the best thinkers of the world. Waterloo doesn't have to look far to see just how one man's philanthropy changed a community, for the good of the community.

We attract the world's best minds to these advanced jobs, and that's more than simply attracting the money, which is a significant part of the model. The community is attractive, and it continues to provide support for ideas, in a ever growing entrepreneurial way. We have it, we attract it, an we're thankful for it, to a whole lot of corporations and philanthropists that continually call Waterloo Region home and benefit from it's mindfulness.

Intelligent Philanthropy is a good thing for the community, when turned into reality, smart money attracts smart people. With the community getting behind and supporting these jobs you see an increase in mission based worked that is outside the scope of religion. These grand gestures are measurable. "To me it's all about people," said Lazaridis. "Attract and retain the most promising people and enable their success, and big things will happen."

Mike Lazaridis, along with Doug Fregin, both families are exemplary examples of what it means to be an intelligent philanthropist. As Waterloo Region grows, equally important become the daily organizations working hard to provide services to the expanding number of community needs. You'll read about many of them in this issue of Exchange. In building a smart community, all groups function with a fundamental acceptance that if we are to grow and prosper as a community, we need to find creative ways to make it work. This can come in the form of money, ideas and re-imagined models. It's really limitless. X

TRADEMARK CHANGES WILL ADD SCOPE... AND EXPENSE

Exchange Magazine Publisher Jon Rohr interviews Colleen Spring Zimmerman, partners with Fogler, Rubinoff LLP about upcoming legislative changes to the Trademark Act.

Exchange Magazine: Why are changes coming to the Canadian Trademark Act?

Colleen Spring Zimmerman: About 2014, the Federal government indicated that there would be changes coming with respect to the Canadian Trademark Act. A process was put in place by the government and provided certain materials to the public so that people could make comments on them. And as we went along and through those processes we've now come to the point where the changes to the Canadian Trademark Act are going to be implemented on June 17, 2019.

Exchange: What are some major changes that will be taking place?

Zimmerman: There are many changes; one change is that we have assented to a variety of international treaties. We [Canada] are now a member of the Madrid protocol. As of June 17, we're going to be able to file trademark applications through the Madrid protocol, and that protocol permits a Canadian to file a trademark application in Canada, and then, based upon that application, to file through the Madrid protocol to more than 100 countries around the world.


Colleen Spring Zimmerman

We will be able to move those applications along to registration. So Canadians who are looking to expand their business, outside of Canada, are going to have help in doing that by being able to file these applications.

Exchange: Where do most clients want to file trademarks?

Zimmerman: Most clients want to file in the United States, in Europe, Australia, New Zealand, and maybe a few other countries including China and Japan... depending on what their future business expansion will be. So now we'll be able to do that in one process.

Exchange: Is streamlining the filing process a "good thing"?

Zimmerman: In most countries of the world when you file trademark applications, you use the Nice classification system. So, a Canadian trademark application sets out the goods and services in association of which, the owner wants to have registration.

Most countries in the world accept the classification system, so that goods and services fall into one of 45 classes... when we file trademark applications, the goods and services are designated, in one or the other of those classes. So that, again this

As soon as June 17, 2019 comes, it's going to be very much more expensive to file those applications.

is a good thing, because most places in the world, including the US use a classification system.

Exchange: Are fees to file a trademark changing?

Zimmerman: The US, as a example, has a filing fee and then, additional filing fees for additional classes. And that's what's going ahead in Canada. We're going to have a filing fee plus additional fees for additional classes, ones that are set out in the trademark application. So right now [before June 17, 2019] we can file in Canada for any number of goods and services, as long as they fall into these 45 classes, and pay only one filing fee, which is at the moment $250.

As soon as June 17, 2019 comes, it's going to be very much more expensive to file those applications. As of June 17, 2019 all of these changes are going to be implemented.

Exchange: Are there other changes?

Zimmerman: In the meantime the Canadian Trademark act is been amended, to change the definition of trademark, so that it is broader. Right now there are certain trademarks that fall within the definition that is currently part of the legislation. As of June 17, 2019, there will be more trademarks that fall within the new definition, for instance smell, texture, holograms, colour of a product and those kinds of things. Let's say you have a wine that smells in a particular way, or you're going to put a label on the exterior of the bottle, that going to have a particular smell to it, that smell would be trademarkable. If you have body lotion, and it has a unique smell, then again you can identify that as a trademark, and yes, you will be able to obtain a registration and stop other people from using that smell, [or] texture.

Exchange: Really, you can trademark a texture?

Zimmerman: If you use the texture in some unique way, as a trademark for your product. You could not trademark velvet for the very product of a velvet piece of fabric, that's not what this is about. This is about if you use a texture, let's say a velvety texture, on the exterior of a wine bottle, a soda bottle, and if you can show that that's distinctive of your product, then you would be able to obtain a trademark registration for it. It has to be recognizable as a trademark for that product.

Exchange: It will open up a huge scope.

Zimmerman: People have been trying to file in advance of the June 17, 2019 trademark changes, so they can obtain registration of certain trademarks that they otherwise wouldn't be able too. We have to remember that, if these applications are still pending after June 17, 2019, they are going to be subject to the new rules as to what is or what is not trademarkable.

Exchange: Are there other significant changes coming?

Zimmerman: The most important ones are the Nice Classification system, the Madrid Protocol, and the definition of trademarks. There are other changes that are coming into effect, in the process of obtaining a trademark, which is of more interest to the lawyers who are processing those trademark applications. We are interested to see how they unfold – things that we haven't had to do before, that we're were going to have to do in the context of, doing the registration.

Exchange: What was driving the discussion?

Zimmerman: In 2014 the government said that they wanted to assist companies in being innovative, including in the trademark field. So they went about looking how the trademark law could be changed, to help that innovation.

Exchange: What about Previous Use?

Zimmerman: Another change that is coming which is completely different than the way things are been done now is that you're not going to have to show use of the trademark in Canada, before you obtain registration. That is one of things that may very well cause more litigation in the country, because companies that don't necessarily have the right to those marks are going to obtain registration.

So they'll file a trademark classification without claiming use, or having to have a trademark register anywhere else in the world for that mark, and they can move that registration to application now.

Exchange: How has that changed the process for the business seeking the trademark?

Zimmerman: At one point every trademark application is subject to advertisement in the Canadian trademark journal, so at that time, any member of the public including any company that thinks there is an issue with the trademark that's been filed, that it's confusing with it's own mark, they can oppose the application. So now, there may be more opposition proceedings, and there may be more trademark litigation, as a result of these changes.

Exchange: What are some legal issues for businesses?

Zimmerman: One of the issue points that comes out of all of this is that a company has to be aware of the fact that trademarks are advertised in the Canadian Trademark journal, once a week. And checking to see if there are any marks that are going to impinge upon their own trademark rights. Right now there are section 45 proceedings, which are cancellation proceedings, that can be brought against a registered trademark. In those proceedings you have to be able to show that you have used the mark in the previous three years before the proceeding have been commenced.

It's really not an end date, it's more like 'Have you been using the mark?" so if you get a mark registered that you have not been using, three years later, any member of the public including the trademark office, can issue a section 45 cancelation proceeding against your registration. It is complicated, and the way that these changes are going to be implemented, and what companies have to think about, they really do need advice from lawyers, in how they're going to take advantage of those changes and what those changes mean for their trademark rights.

Exchange: What are the differences between trademarks, copyrights and patents?

Zimmerman: Trademarks are not to be confused with copyright. But copyright does not protect, it's not like a patent, it doesn't protect the fundamental aspect of what's written on the page. So a recipe would not be the subject matter of a trademark, it could be the subject matter of a copyright. Patent you have to apply for and assuming it granted, is valid for 20 years from the date of filing. And then, unless it can be extended, it's not valid anymore. A trademark can go on for ever; trademark registrations can be renewed and the changes to the act [mean] in terms of the renewal, it is currently 15 years and after the changes it will be 10 years.

Exchange: What can a company do to limit risk when advertising and promoting goods and services online?

Zimmerman: Let's just say a tech company is advertising and promoting their goods and services online, digitally; they have either social media platforms, wireless platforms that they are using to promote their goods and services. They could be very creative, in the kinds of trademarks that they use online to promote their goods and services.

They may be able to do things like holograms or other displays on, let's say a wireless phone that could be the subject matter of a trademark registration. Those kinds of companies usually promote online or do television advertising, or whatever – so they may be able to use these new rights, to obtain registration for things that wouldn't have before, and things that would be quite appealing to their demographic.

The Canadian Marketing Association has been very good at bring this forward to their members. X

INQUIRING MINDS WANT TO KNOW

BY PAUL KNOWLES

As we at Exchange magazine planned this issue, focused on “Giving, Intelligent Philanthropy and Communication”, we reached out to leaders in the not-for-profit and charitable world. We presented a survey, asking respondents to tell us what they would like to see in this magazine.

We tried to meet those requests, bearing in mind that all our articles also need to be interesting, relevant, and newsworthy.

You told us that you wanted us to share information on the best time to consider a bequest, on being sure your legacy matches your interests, and if the act of donating is more important that the dollar amount.

There is a consistent theme through all our articles – and that is, it is never too soon to give, and never too soon to plan your giving, now or as a legacy. The need is great – and you will read about some of the immediate needs for support in our articles on Strong Start, nutrition programs, the new Hospice of Waterloo facility, and just about every feature in this magazine.

And when it comes to being sure your legacy matches your interests – you will meet people who have channeled their personal passion for the public good, benefactors ranging from business magnate Mike Lazaridis to artist Carmen Evans.

It becomes clear in many of these articles that “donating” means much more than money – Nutrition for Learning, alone, lists 2,500 volunteers helping to carry out their programs.

You also wanted us to report on examples of planned gifts that have made a differences, and why charitable organizations need to promote their community value.

There are some striking and unique examples in our articles – gifts of land that are enabling the environmental work of rare; donations that are allowing the new Grand Innovations centre in Cambridge to initiate an enormous impact in that community; the gift of the Gies Family that is helping Hospice of Waterloo add significant services to their important work.

The question of charitable organizations promoting their community value is a good one – and some of the organizations we talked to admit that they may not do as good a job, here, as they could. That’s where we come in – this issue is opening a window on great work being done by many organizations, including, for example, Wellbeing Waterloo Region, which is gathering vital information that identifies the crucial needs in our community.

You wanted us to offer ways to work planned giving into a conversation, and options to consider when you want to give more than you can afford to give. And why planned giving is for everyone, not just the wealthy.

One effective way to introduce planned giving is to talk about the people and programs you will meet throughout this magazine. And we think we have done a good job of identifying donors and volunteers from many walks of life and income groups – from millionaires who found institutes, to retired heroes who sit at the bedside of someone who is dying, just to bring them comfort.

You wanted a focus on both how to give and why to give.

One answer, offered in a response to our survey, simply said “giving actually makes people happy.” There are plenty of other reasons throughout our articles. How? The options are almost limitless; you asked about ECOgifts, bequest, life insurance, gifts of shares, and endowments, and you’ll find a lot of information you need included in our articles, and still more by following up with the many fine organizations listed in our index of charities and not for profits.

You wanted us to look at the challenge of raising money for good causes when the number of donors is declining, and at the growing competition for financial support.

The answer to this is not found in our articles – it is found in you, our readers. We publish this edition, each year, as our own answer to that question. We provide you with the information about the needs – for money and for volunteer time – and the options when it comes to giving. And then, as members of this community, a community with vision and promise yet deep-seated needs as well, we hope you will be inspired to become the answer to how important organizations can continue to be financially sustainable.

We hope that this issue of Exchange will be more than a good read – that it will be an inspiration to action.

X

ECOGIFTS – FORESIGHT THAT PROTECTS FUTURE GENERATIONS

BY CHRISTINE THOMPSON

You are probably familiar with bequests, life insurance and charitable annuities as ways to leave a legacy. Another method is less well-known but it, too, can be put in place today to ensure results that have a lasting impact.

Canada's Ecological Gifts Program (ECOgifts) offers tax benefits to Canadians who donate ecologically sensitive land to eligible organizations – like the rare Charitable Research Reserve, an urban land trust and environmental institute that has the conservation and protection of Canada's environmental heritage as its priority. Sometimes the lands remain in the family but are subject to a covenant or an easement that ensures their long term protection. As long as certain criteria set by the Ministry of the Environment are met, then the donation of the ecologically sensitive land results in capital gain benefits.

Our population is growing and our needs as a community will too. We'll need housing and we'll need roads but we will also need green spaces – ones that protect our health through clean air, water and soil and are large enough to support biodiversity and provide the habitats needed to help stop the dismaying trends in wildlife decline.

Introducing raresites: A Watershed Approach to Saving Lands and Protecting Water, together

During rare's Strategy and Planning process in late 2014 and early 2015 – through surveys, focus groups, expert interviews and a town hall meeting – it became apparent that one of the biggest issues faced by conservation in the Grand River watershed and adjacent areas is a lack of grassroots efforts to protect land; we are losing agricultural land as well as natural areas at an unprecedented rate. Now, as it is developing its next 5-year plan, rare is building on its conservation successes to protect much more of the Grand River watershed, acknowledging that it and its tributaries – including the Eramosa River – are heritage rivers under threat.

With its headquarters at the confluence of the Grand and Speed Rivers in Cambridge and North Dumfries Township, rare's first three locations comprise over 900 acres within the Haldimand Tract that spans six miles on either side of the Grand River from source to mouth, land granted to Indigenous Peoples in 1784 to recognize their support for the British in the American Revolution. In Wellington County, rare is creating an Eramosa River Conservation Corridor to protect the river and its adjacent forests and uplands – lands of the highest ecological significance and which are so far largely unaffected by direct human impact. For all its properties, rare acknowledges and is grateful to all of the original stewards of the land. These lands function as a living laboratory,

rare's first three locations comprise over 900 acres within the Haldimand Tract that spans six miles on either side of the Grand River from source to mouth.

ECOgifts – your gift to your world.

taking us beyond traditional Western methods of land preservation and providing unprecedented opportunities for ecological research, education, community engagement, recreation and reconciliation. The work at rare discovers best practices and answers to environmental problems that can be shared worldwide. And through a Chain of Learning, they make their findings available to even the youngest citizen.

> "Wellington County's beautiful countryside is one of the reasons it's such a great place to live and raise a family. The land acquired along the Eramosa River by the rare Charitable Research Reserve – through generous gifts and long-term funding – will leave a lasting legacy for generations to come."

The kind of work going on at rare is now being shown to have the best chance of success at changing the trends in rapid species decline; namely, they take an ecosystem-based approach that protects multiple species, while doing important research to begin understanding what is really going on within the natural world. They also work to understand the interconnectedness of all relationships with land and people in small "islands" of protected space – all that is left to us on an increasingly developed planet – and they use their knowledge to educate the next generation of conservationists who will be responsible land stewards. The staff, advisors and volunteers at rare will bring well-planned, sustainable conservation activity to the lands, including science- and Indigenous knowledge-based stewardship and environmental research projects, while connecting with the Wellington/Guelph community through restoration and maintenance, educational hikes, and citizen-science volunteer opportunities that include monitoring birds and butterflies.

rare's first purchase of lands outside of the Cambridge area – 87 acres of pristine lands in Rockwood with multiple differing habitats ranging from cedar swamp forest, through hay meadows and high quality mixed forests, to provincially significant wetlands and part of the Eramosa Valley Area of Natural and Scientific Interest (ANSI) – sets in motion the protection of over 600 acres from Rockwood to Everton in Wellington County, protected and stewarded in perpetuity by rare.

"Wellington County's beautiful countryside is one of the reasons it's such a great place to live and raise a family. The land acquired along the Eramosa River by the rare Charitable Research Reserve — through generous gifts and long-term funding — will leave a lasting legacy for generations to come," says Hon. Michael Chong, P.C., M.P., Wellington-Halton Hills.

rare's Natural Legacy Society — your life's values remembered

Various legacy gifts support these efforts, including a bequest commitment and three ECOgifts: two donations of conservation easements, and a donation of conservation lands on what was the former Edgewood Camp. These donors are forward thinking – ensuring their values are remembered, in perpetuity – helping to ensure the lands around the Eramosa River are stewarded through Western science and traditional Indigenous ways of knowing and being, now and forever.

"We chose rare Charitable Research Reserve to be the recipient of this gift because of their dedication and commitment to protecting these vital wetlands and forests."

One of the people helping to launch the Eramosa Conservation Corridor is Ruth Bowes of TrilliumWest Real Estate which serves Wellington County. She is one of seven individuals who came together and purchased the former Edgewood Camp in Eden Mills: "We purchased a property with an environmentally significant wetland along part of the Blue Springs Creek in the Grand River-Eramosa River watershed with the intention to sever and donate this area to an Ontario Land Trust to protect the land in perpetuity for future generations to enjoy.

"The property supports a large diversity of plants and animals native to southern Ontario. The cold-water creek and Provincially Significant Wetland are key links in a continuous, forested valley corridor extending from Acton to Guelph.

"We chose rare Charitable Research Reserve to be the recipient of this gift because of their dedication and commitment to protecting these vital wetlands and forests and because they participate in the Canada EcoGifts program that will provide a tax credit for the donation."

There is perhaps no greater legacy then leaving the gift of a healthier environmental future for generations to come – especially now when increasing urbanization takes up vast swaths of land.

"Ontario's natural heritage is our strongest asset for growing food, preventing flooding, ensuring clean water and providing habitat for wildlife. Conserving our greenspace is a sacred responsibility and an essential part of climate action. I thank rare Charitable Research Reserve for their work protecting the places we love, and the donors who have the foresight to make ECOgifts of property to help create green corridors; protecting species and spaces for future generations," commented Mike Schreiner, Green Party, M.P.P., Guelph.

"Just the incentive I needed"


Carmen Evans

"I've been meaning to make a Will for a long time," Carmen Evans confessed over dinner one night at Artisanale in Guelph. The lively group around the table had made their way from one topic to another, including a discussion of rare's move into the 'hood by creating an Eramosa River Conservation Corridor, just one example of the long-term thinking the charity exhibits in its programs. "In that conversation I realized that rare's motto of 'intact in perpetuity' to describe its vision for conservation really provided me with the clarity I needed to put my own ultimate vision in place," said Evans. "rare's Natural Legacy Society was just the incentive I needed."

As climate change wreaks havoc around the world, those places with high deforestation and other disturbances of the natural landscape are often harder hit.

A young, single artist and professional, Evans makes time in her busy life for community service and continual learning. She teaches violin and viola at the Suzuki String School of Guelph and, among other things, is an avid cyclist, reader and 'mother bear' to the Red Bears team for the annual Walk & Run for rare.

As Major Gifts Manager at rare, I welcomed Carmen to the club: "It's always so inspiring to those of us who work hard every day to advance conservation, research and education for the benefit of our communities to meet yet another person who believes in the long-term value of what rare represents and does. What an honour to be included in someone's Will!"

A bequest like Carmen's is a commitment to ensuring personal values are perpetuated long after one is gone, all the while reducing taxes and maximizing gifts to loved ones. Including rare in this plan means keeping vast natural green spaces available for future generations to enjoy.

As climate change wreaks havoc around the world, those places with high deforestation and other disturbances of the natural landscape are often harder hit. But it's not just far-flung places that are in decline. One of the most comprehensive reports on trends in Canadian wildlife populations was released in 2017 and the results are shocking to many who think of Canada's vast wilderness areas as a refuge for wildlife. After all, we have a quarter of the Earth's wetlands, 8,500 rivers and more than 2 million freshwater lakes. But, as the report shows, during the past four decades, human activity – whether industrial development, farming, forestry or the expansion of urban areas – as well as climate change, pollution and overfishing have helped shrink the populations of 451 species, representing half of the 903 monitored species in the country.

Christine Thompson is Major Gifts Manager, rare Charitable Research Reserve and can be contacted at 519-650-9336 x118 or Christine.Thompson@raresites.org

X

ANALYTICS & RESEARCH SHOWS A DIFFERENCE

Where Data can help but probably isn't

BY JON ROHR

When we think of the magnitude of the digital age, we might assume that marketers are swimming in deep pools of data. But surprisingly, Rupen Seoni, Senior Vice President and Practice Leader of Environics Analytics, says, "There is relatively little data out there, and it's been relatively expensive to use."

Data has mostly been generated and used by larger organizations that had the budget and were able to leverage data and analytics in their businesses and their marketing. However, "what's been happening over the years," say Seoni, "is the democratization of more of that data. It's now cheaper to collect." Data is, in fact, everywhere. Any business using a CRM system, or doing digital transactions in digital media, is generating it.

"The quality of it is not necessarily consistent," adds Seoni. "There used to be a lot of good data around, and now there is some great data and some bad data. There is more of everything. The challenge that a lot of organizations have is to bring the systems in place and to have the right people in place is to help use all of this data."

> "There used to be a lot of good data around, and now there is some great data and some bad data. There is more of everything."

Solving real business problems at both a strategic level as well as bringing it right down to an educational level is a big challenge. Data is being used for all kinds of interesting things. Says Seoni, "In our experience – and we have a nice perspective because we work across pretty much all industries – we see what in practice is going on with all kinds of organizations, large and small, private sector, public sector, not for profit sector, really in all industries. What we see is that there can be a lot of distraction with the bleeding edge. At the very leading edge are interesting examples which are aspirational, but will one day become the norm."

The reality is that organizations are "still struggling with some of the basics: existing tools that they have had for years, pulling their files, cleaning their data, integrating their data… You'd be surprised, large organizations that you think would have excellent data that they're using, are still struggling with a lot of the basics."

Adding to the complexity is that marketing people and analysts think very differently from most executives. So the marketers and analysts need very good data, models and analytical approaches to take to the executives who make the final decisions.

Not for profits

The not-for-profit industry has some specific needs. Fundraising is an obvious one. Use of data would help identify potential donors, those who have the capacity to give a large gift. Fundraisers could use statistical modelling, identifying the best prospects for that so they can zero in on the right people as well as knowing those donors better. By applying technical and population data to donor

Rupen Seoni

pools, says Seoni, "you can understand what they're interested in, what they care about, etc. So foundations can acquire donors with more efficiency."

Another need is around mission. Not-for-profits need to be more relevant about their mission, whether it's environmental, health of community, or politically motivated. They will benefit from an increased understanding of what issues are going to be more relevant with the donors and influencers. Any charity needs to be focused, and targeted to the actual population that is going to naturally gravitate to their cause. They need to know what will let them identify with that population, understand them and speak to them in a targeted and specific way. There are so many opportunities these days in terms of cost, like communication through social media and other digital media, so you can get very specific in your target.

For a charity, the first steps should be to invest in the process. Develop a good understanding of "actually who you are trying to reach," says Seoni. Historically, the not for profit centre has been reluctant to invest in obtaining and using relevant data; the private sector understands it much better and has the will to invest and will be ready to invest much quicker.

Says Seoni, "Not-for-profits are more reluctant to spend money and understandably so – they want to make sure there money is been put to good use." But the adage, that you have to invest a little bit to reap a return, reigns true, as long as those returns support whatever cause they're trying to fund further.

Seoni argues that organizations have many tools, but now have to deploy them better. Two current trends in deployment are "refinement and systematization" "synthesizing the whole process, so that it's a machine that runs, generates a lot of efficiencies and targets messaging in a refined way."

Seoni stresses that you need to be creative around the deployment and the measurement, "really proving out the value case for using new media, because they have not traditionally being used to get the message out there." In addition, the mobile consumer is fascinating. Watching for data on mobile device movement will allow an organization, like a conservatory, amusement park, outdoor festival or ski hill, to understand their consumer at a whole new level. This is a relatively new level, and a very different level of insight on consumer behaviour that's being generated.

A look at deployment tools reveals the medium for sending a message. Messaging is targeted to individuals via large communication platforms, but are the messengers spending enough time on understanding the demographics and what messages they are sharing with them? "A lot of assumptions are made in the advertising and marketing advertising spaces. [But some are wrong. For instance,] you just can't lift ads from one market to another. The reality is that you just can't," according to Scott Megginson, President, Kantar-Insight Division, Canada.

Ads don't travel

"Our research, very emperical research, indicates that ads don't travel from one market to the next." It really comes back to a lot of cultural variables for marketers, for example, roles in the household – how women are portrayed in advertising. "Because it's a real myth in Canada." Megginson highlights the unique Canadian marketing culture, which is, he believes, "very, very focused on the scientific part of it." He's referring to the insights, the ways we find people and the tools we use to find those people, and the tools we use to deliver the message. All of that, he argues, "is coming at the expense of the art part of it."

For instance, multiculturalism is celebrated in most corners of the country. Megginson says it's "one of the defining and enduring features of Canadian life, and that's not true in the United States," where the portrayal of diversity and the use of ethnic insights in US marketing is very different and very complicated.

He contends that Canadian marketers are not as focused as we could be on some of those cultural factors – the nuances. He argues that marketers get stuck in the language of the "consumer", forgetting that consumers are people, people whose lives are very complicated. Trying to use the same words for diverse people will not be effective. Instead, understanding what the un-met needs are, and then trying to position products and services in the right way requires a pretty sophisticated understanding of not just the tools to do it, but what the problem is in the first place.

Megginson says, "If I could put my finger one thing that I think we can do better for the next generation of marketing professionals, it is to create a greater cultural literacy among marketers."

Another area where Canadians are different from their US counterparts is that Canadians tend to be less brand-centric, "not brand agnostic, sort of brand forward, maybe that's a better way to put it," says Casey Ferrell, Kantar VP Head of Canada. "We ask people what type of experience did you have with a brand?" When they name their first choice of brand, "the difference between the US and Canadian is sizeable, it's significant, it's over 75% for Americans, it under 70% for Canadians. While that's not a massive change, it is a big enough difference that where if, thinking about status and brand, how it's thought of represented in US marketing, we will be missing that here, simply because brands don't play the same role that they do to that same extent, in Canada as they do in the US."


Scott Megginson

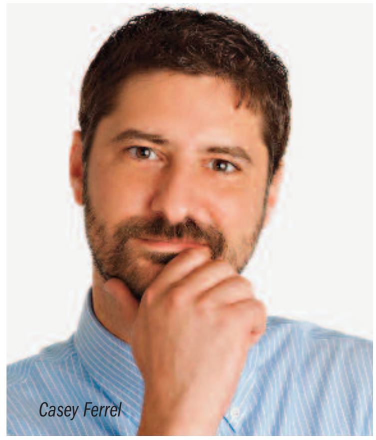
Analysts find that Canadian run a different home than Americans do. It's more egalitarian, the home is run by the couples. In Canada they are a lot more likely to say that they share equally, different household responsibilities like paying the bills, cleaning the house and talking care of the kids, all the things you need to do to run a house.

Gender stereotypes

That sets us up to talk about gender stereotypes and marketing.

Megginson points to the last crop of graduates that he's seen come out of marketing schools, saying they "are very focused on 'head of household'", the grocery shopper. That, he says is "the fundamental challenge, problem, or flaw - I should say … our research shows, that that's not the case anymore. 90% of men and 90% of women say that they share the grocery buying in the household."

A greater problem, Megginson says, "is how women are portrayed in advertising. We did a global study called Adreaction, and we find that women are featured in more ads than men in Canada. However, those ads are less receptive than ads featuring men. It comes back to the portrayal of women … you can close your eyes and think of five or six ads that really aren't in step with what consumers believe. What we've learned about it is that Canadian women are more receptive to humour in advertising than men and that's rare, it's not like that in other markets, it's really interesting. The sense of humour in the US is very different than it is in Canada, that's one problem. We're talking quite a different culture, in a market that has a different sense to it."


Casey Ferrel

If you rely on gut instinct and your guts come from an all-male boardroom, you may just might miss the funny bone.

> "Everyone I talk to about that phrase 'female empowerment' is tired of it, they want to take the 'em' and the 'ment' off the front and back of it and just talk about power."

Megginson says that one approach to being effective is to deal with specialization. This has less to do with methodology, than in areas of exploration, like customer experience and how people relate to brand.

Ferrel says that, "We're going to go where consumers take us … when I look at the consumer landscape, and I see where the prevailing trade winds are blowing, I think that we are looking at increasing inclusivity, and increasingly, diversity and increasingly, female lead in the consumer environment." These three things are going to be "in the near term", a force that forces marketers to "think about doing things differently."

Ferrel reflects on the reality that, for a long time, we have been talking about female empowerment. He contends that "everyone I talk to about that phrase is tired of it, they want to take the 'em' and the 'ment' off the front and back of it and just talk about power."

He says, empowerment is about representation whereas power itself, raw power, is about "agency" and having the "ability to affect change on ones own." He continues to say that women have for a long time been the key decision makers in some sectors of the consumer market, in some areas of daily life. And while we may still have very male dominated notions of who the power broker is in the house, when it comes to lots of decisions, like big ticket items, or financial and investment decisions, "that's a trend where I think we are watching really carefully, because as women find their way into the upper echelons of home power, then the game changes quite a bit from gestures and nods to needing to really innovate in fundamentally different ways." X

Mike Lazaridis, left, and Neil Turok, right, celebrate the appointment of Perimeter Institute's Rob Myers.

THE VALUE OF "BLUE-SKY THINKING"

Perimeter Institute pioneer Rob Myers takes the helm

BY EXCHANGE MAGAZINE

Even when it's expressed in "layman's terms", it can be a challenge to "get a handle" on the work Rob Myers has been doing. For instance, a recent media release from the University of Waterloo attempts this explanation: "Myers is a global leader in theoretical physics, pioneering the study of black holes within the broad context motivated by string theory. Among his landmark contributions are: the discovery of the first higher-dimensional rotating black hole solution (now known as the Myers-Perry metric); key progress on understanding the statistical interpretation of black hole entropy; a string theory analog of the dielectric effect – the 'Myers effect'; and most recently developing new relationships between quantum entanglement and the emergence of space-time geometry."

So it's rather ironic that Myers admits that he is now working hard to – in his words – "get a handle" on his new assignment, as Director of the Perimeter Institute for Theoretical Physics.

Myers succeeds cosmologist Dr. Neil Turok, who has served as Director since 2008, and now will continue to carry out research at Perimeter.

Less than two months after his appointment to the top post at Perimeter, Myers told Exchange, "I'm doing fine. I'm very, very busy. Part of what is keeping me busy is meeting people, but also trying to get a handle in more detail on what our friends in the admin staff are doing, what we are doing in outreach, what we're doing in advancement and all those things."

Myers is one of the originals at Perimeter, coming to the nascent facility 18 years ago. But he's been doing theoretical physics; his focus until now has not been on the operational side of the institute. He says, "I was only very, very peripherally involved in those things. But now, I have to make decisions about budgets – how much money goes to this, how much money goes to that – so I have to have a different view."

He says that upon the announcement of his appointment as director, the first thing he did was to make his acceptance speech; the second was to ask for help. "As soon as my speech stopped, my assistant sent out a bunch of emails to the senior faculty and the faculty, and that was the start of a consultation procedure. There are a lot of smart people here, they're all invested, they're engaged in the enterprise and as much as I have my own ideas, I want to tap into the ideas of all the people around me. It's a collective enterprise and we'll come up with a plan for the future."

The Perimeter Institute was founded in 1999 by Research in Motion co-founder Mike Lazaridis. Its website explains, "Its mission is to advance our understanding of the universe at the most fundamental level, stimulating the breakthroughs that could transform our future. Perimeter also trains the next generation of physicists through innovative programs, and shares the excitement and wonder of science with students, teachers and the general public."

Myers acknowledges that the Institute officially began 20 years ago, but explains that it took a couple of years to move beyond concept to beginning research. "Twenty years ago the Institute was declared as a charitable organization. I and the other researchers showed up about two years later, so we're going to hold off on the celebration for a couple of years... but I'm sure there will be a party."

> "There are a lot of smart people here, they're all invested, they're engaged in the enterprise and... I want to tap into the ideas of all the people around me."

In the meantime, he says, there is work to do. "We're really building on a legacy of almost 20 years of real excellence and success. It's not a matter that we have to find a major new course change or we have to change things, it's more, in my mind, that we have the race car built and the engine is running fine and we just want to push on the accelerator and keep going in the right direction.

"That's not to say that there are not things that we can do better. There are new things that we could try, but there are so many things that we are doing well that I want to keep that momentum going, really build on the success that we've seen."

Made in Canada

Robert Myers has significant international connections – he received his Ph.D. from Princeton, did post-doctoral work at the University of California, and has been a "Visiting Physicist" at the Centre de Physique Theorique, Ecole Polytechnique, in Palaiseau, France. He was named one of the world's most influential scientists by Thomson Reuters/Clarivate Analytics in 2014, 2015, 2016 and 2017, the only Canadian listed in those years, and the only physicist worldwide to be named in each of the past four years (2014-2017).

"I got really excited about being able to stay here, in the town where I did my undergrad, to do something for Canada. That's really been driving me, these past 20 years."

And he is, indeed, a proud Canadian – and that's one of the reasons he has remained a loyal part of the Perimeter Institute since its beginnings.

He grew up in Deep River, Ontario, and describes his home town as "an unusual town because it has 5,000 people, but about 2500 Ph.D.s. It's the bedroom community for Chalk River Labs, a place the government set up. Atomic Energy Canada set up a lab there after the second world war… They did a lot of work to try to understand nuclear physics, radiation, they designed reactors… For the day, it was cutting edge research. It really is a very special place. When you're growing up there, this is a small town and you can't wait to get out. But afterwards… it's really an idyllic place, a great place to bring up kids."

His affection for doing science in his native land never waned, and he believes he is not alone in that sentiment. "We've been really building our base in Canada. There is a whole spectrum of donors, but there are a lot of great donors who are making significant contributions, who are really committed to Perimeter, who see it not only as a unique endeavor but as a Canadian endeavor. Mike [Lazaridis] really inspired me, but I have to confess that's part of what drew me here – an opportunity to do something really do something special for Canada, and to stay in Canada.

"I was just starting a family, we had three young kids, and I was thinking about moving, looking for new opportunities that were south of the border, and it would have been a big step for us to move away, so I got really excited about being able to stay here, in the town where I did my undergrad, to do something for Canada. That's really been driving me, these past 20 years."

Three priorities

Myers' new responsibilities will not preclude him from continuing his research in theoretical physics. He also holds the BMO Financial Group Isaac Newton Chair in Theoretical Physics at Perimeter.

But the new director underlines the fact that the Institute has had three priorities from the outset: "research, training and outreach."

Myers says, "Perimeter is operating at all these different levels. Research is the goal that brings most of us here, every day, but I'm [also] working with PhD students. That's one of the most satisfying parts of my job, is working with these young people – we call that the training or the education."

He adds, "I see that one of the success stories of Perimeter is the outreach, sharing with general public, or with high school or elementary school students. We have a relatively small team but they are very dedicated and they do amazing stuff, here in Waterloo, across Canada, and we have reached out across the world.

"I was just at a lab in Geneva called CERN [Conseil Européen pour la Recherche Nucléaire], where they have this huge particle collider. I met with the director general there, and I realized our strongest relationship with them is that our outreach team has been working with them for over 10 years. They really have established their own reputation and recognition."

Myers believes that Perimeter has established an impressive international reputation for all of its work. "It really is a landmark, a resource for the international community. It has really surpassed anybody's expectations. Something really special happened here. People in Princeton, Harvard, Cal Tech, they know Perimeter, they think of us as colleagues, collaborators, sometimes competitors. To think that we could compete at that level is really, really amazing."

"I see that one of the success stories of Perimeter is the outreach, sharing with general public, or with high school or elementary school students."

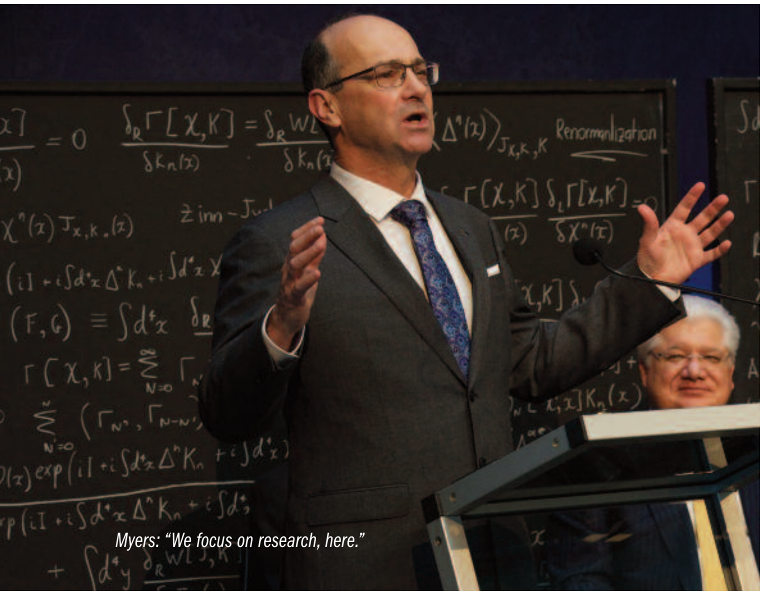
Collaborations

Myers has stated that as the newly appointed director, his first priority is to consult with his colleagues. He is a big believer in collaboration. And while the number one partner may his undergrad alma mater, the University of Waterloo, the Institute has a relationship with many other collaborators, as well.

He told Exchange, "We're really a private institute. We stand on our own two feet. We have a very strong relationship with the University of Waterloo, and that was important from day one. But we're also engaged with a number of universities in southern Ontario. We have one partner on the west coast, the University of Victoria, where there is a joint hire, a fellow who works both here and in Victoria. We have partnerships with a number of universities stretching across the country. But it's certainly true that Waterloo is one of our strongest partners. They also have a focus on math, engineering and science."

Myers explains, "Most of our Ph.D. students are officially students at the UW. We're not a degree-granting institution. It goes both ways – I think they're very happy to have the enterprise there, this world-class research institute. The students over there get the benefit of coming over here for seminars or courses. We're also working with them in a number of different ways. In particular, one of our partners is the Institute for Quantum Computing, at UW."

He believes these kinds of relationships can only grow stronger. "I see that partnership is just going to grow in the coming years. In particular, we're the theory institute, and they have experimentalists and experiments over there. It's really an exciting time in the Quantum area. They're really developing. Quantum computing and Quantum information was really an abstract, it was theory for



Myers: “We focus on research, here.”

a lot of years. A lot of people were working, and still are working toward the Quantum computer. I'm not saying we're there, but they have developed platforms that are really exquisite. They can control individual atoms or individual spins in the most sensitive ways. It really sets up for the theorists to be able to propose a lot of interesting experiments.

“I'm hoping that as the systems over there develop, that we'll be developing strong collaborations between the theorists here and the experimentalists over there.”

He sees huge advantages for his theoretical physics colleagues and students in this close-at-hand connection. Some scientists at Perimeter are working with American universities, and while Myers understands those collaborations – he has done the same thing – he adds, “They are world leaders, so it's natural that they take their ideas there. But on the other hand, our friends [at UW] are just across the park. I think it would be a lot easier if I had a friend across the park, and I could go and have lunch and talk to him every day as opposed to having people hundreds of miles away. I see a real opportunity.”

> “People in Princeton, Harvard, Cal Tech, they know Perimeter, they think of us as colleagues, collaborators, sometimes competitors.”

Research, pure if not simple

Myers is fierce in his defense of the fundamental purpose of PI. Even though its greatest benefactor is world-renowned entrepreneur Mike Lazaridis, Myers insists that Perimeter's people do research simply for the sake of learning – not to produce any marketable products. PI, is says, “is not a goal-oriented enterprise” – at least not with monetary goals. “We focus on research, here.”

But he sees real value in what he calls “blue-sky thinking”. “We have to be ready to invest in this kind of blue sky thinking if we're going to see the successes, the amazing things that we take for granted.... Those ideas, what seem like very remote or esoteric ideas, eventually they are harnessed, and they turn into technology. But it's on a very, very long time scale.”

THOUSANDS BENEFITTING FROM LOCAL NUTRITION PROGRAMS

Eight per cent of local households are “food insecure”

BY PAUL KNOWLES

Food insecure – it's not a phrase that most of us would use in everyday conversation. But the truth is, in this region, there are thousands of people for whom being “food insecure” is indeed an everyday challenge.

These are families and individuals who don't have the financial resources to guarantee adequate and healthy diets for themselves and those they care for.

They are kids and parents, young and old, employed and unemployed. All they have in common is that nutrition – one of the fundamental necessities of life that most of us take for granted – is a constant issue in their lives.

In fact, Waterloo Region ranks as the sixth most food-insecure region in Ontario at three per cent of households and about 61,000 people, according to Region of Waterloo Public Health. That means about eight percent of households with children are food insecure.

> Waterloo Region ranks as the sixth most food-insecure region in Ontario at three per cent of households and about 61,000 people.

The good news is, a lot of people have recognized the need created by this sobering reality. There are well over 100 programs in Waterloo Region created to provide help to those who are “food insecure.” And those programs are probably as diverse and unique as the people they are seeking to serve.

There are the well-established organizations like the Food Bank of Waterloo Region and the Cambridge Self-Help Food Bank, which serve a wide section of the food insecure community, and help to coordinate or facilitate dozens of other programs, through the Community Food Assistance Network.

There are new, innovative outreaches like Food4Kids, created by Kelly-Sue Oberle, former executive director of Nutrition of Learning. Food4Kids was launched two years ago to provide nutritious food for food insecure kids, on weekends and in holiday times.

There are other programs focused on children – like Nutrition for Learning; and on seniors – like Meals on Wheels, now a program of Community Support Connections.

Diverse programs

These nutrition programs are very diverse, but they have a few things in common, across the board. They are offering solutions to a problem that is a daily challenge for a significant number of local

Myles Power, owner of Freshco, at University and Bridge, Waterloo

people; they are reliant on donations from corporate sponsors and the general public; and they use thousands of volunteers to carry out their work.

"A community that cares"

Kelly-Sue Oberle created Food4Kids after she left Nutrition for Learning. Her experience with that organization – which provides food for kids on school days – showed her that if a family is food insecure, it is a daily – in fact, three-times-a-day – problem that doesn't go away when children head home from school on Friday afternoon.

"On weekends," she says, "very seriously food insecure children really feel the crunch." Kids go hungry, or eat non-nutritious food, and by the time Monday rolls around, they have no energy to go to school.

> "On weekends, very seriously food insecure children really feel the crunch." – Kelly-Sue Oberle

So she created the local Food4Kids, which is now providing food for over 500 children every weekend, and for about 150 every day of school holidays, including summer. Each week of school term, 14 to 16 items go home with children under the age of 14. If there are multiple kids in the family, each child gets their own package.

Because her program is quite new, Oberle says it receives no government funding, and is not affiliated with the local Food Banks. She relies on donations, and the commitment of 45 regular volunteers, as well as occasional groups of corporate employees who help prepare the food parcels, which are given to kids by their teachers.

The goal is simple, says Oberle. "We want these kids to be healthy and to survive, and to fell they're part of a great community that cares about them."

"There is a need"

Myles Power is a good representative of that "community that cares." He owns the FreshCo at University and Bridge in Waterloo, and he's the source of a lot of the food that is distributed by Food4Kids and through at least one church-based food hamper program. He also once supplied Nutrition for Learning.

> "Nutrition is something we should all be thinking about, every single day." – Wendi Campbell

He sells the food to the programs at cost or below, simply because "I know there is a need, and I know they only have so much money." He says that he has saved the organizations as much as $200,000 some year.

Thousands of hungry kids

The estimate of 61,000 food insecure people in Waterloo Region includes a disproportionate number of children. That becomes immediately clear when you see the figures provided by Nutrition for Learning, a local initiative launched in 1997 that now provides a meal every school day to over 25,000 children in 136 school programs (more than three-quarters of Waterloo Region schools). That adds up to something approach three million meals annually.

The children benefitting from the program may not be stereotypical, low-income kids. There are a lot of reasons why kids go to school hungry – from sleeping in too late to have breakfast to starting the day at a pre-school child care site that doesn't provide breakfast – so every child who wants food through the Nutrition for Learning program can have food.

Like most of the nutrition programs, Nutrition for Learning has a relatively small staff (today it is headed by Brian Banks), and heavily on volunteers, in the case of NFL, about 2,500 of them.

Supporting seniors

At the other end of the demographic, a significant number of Waterloo Region residents who are food insecure are seniors and adults with disabilities who live in their own homes. There may be economic challenges, or it may simply be too difficult to get out to buy groceries. That's where a problem like Community Support Connections – Meals on Wheels and More – is making a difference.

Executive Director Will Pace says the program delivers a nutritious meal, a smile and a safety check. "Our population is aging and for our neighbours struggling with access to food, Meals on Wheels is a proven collaboration of local community organizations, businesses, levels of government, and hundreds of dedicated volunteers."

It's not a question of convenience – in many cases, having meals brought to their home means these people can continue to live at home, and not have to move into a care facility. "Meals on Wheels relieves some of the pressure on an already burdened healthcare system," says Pace. "Keeping people in their own homes benefits the entire community and saves in healthcare costs."

Environmentally healthy

Kitchener-Waterloo's The Working Centre has also launched a home delivery services, bringing healthy food right to people's homes. And they are doing it in an environmentally friendly way. The program is rooted in the Hacienda Sarria Market Garden, which for six years has offered Community Supported Agriculture shares to the community. A weekly spread of vegetables has been made available for pickup at the Queen Street Commons Café, the Tannery, and at the Hacienda Sarria Market Garden where the produce is grown. Now, by offering an environmentally friendly delivery service, Eco Courier and The Working Centre are providing low-emission alternatives for Kitchener-Waterloo residents to get fresh local food through a convenient weekly delivery.

> Nutrition for Learning now provides a meal every school day to over 25,000 children in 136 school programs.

The Working Centre's Hacienda Sarria Market Garden is a volunteer-driven community enterprise that practices and promotes sustainable farming in Kitchener-Waterloo. The garden is a fully functional one-acre urban farm where all are welcome to join in the work. Each season, more than 150 volunteer gardeners take part in growing abundant and high-quality vegetables, fruits, and flowers.

Last year, The Working Centre provided 75 families with weekly fresh, organic vegetable shares from its urban agriculture projects. They produced over 15,000 packages and bundles of produce from the Grow Greenhouse and Hacienda Market Garden.

Over 100 programs

There are well over 100 nutrition-based programs in Waterloo Region, and many of them are connected in some capacity to the Food Bank of Waterloo Region and the Cambridge Self-Help Food Bank. Wendi Campbell is CEO of the Waterloo Region bank. She thinks that, "Nutrition is something we should all be thinking about, every single day."

And focus on nutrition – not simply everything known as "food" – has altered the viewpoint of most of the organizations helping food insecure families and individuals. Says Campbell, "So when we are putting together our supplies for our hampers and our meal programs, we do focus a lot on fresh fruits and vegetables, which is a very big proportion of what we distribute in the community… the healthiest possible food."

> "Meals on Wheels relieves some of the pressure on an already burdened healthcare system." – Will Pace

However, the leaders of these programs are also aware of the social importance of food. Campbell adds, "Cookies are okay. We want to make sure kids feel like kids, and treats are important." Kelly-Sue Oberle, of Food4Kids, had made the same point. Their weekend food supplies include cookies or chips, "something to make them feel that they're just like everybody else."

Campbell underscores the variety of programs meeting nutrition needs in the community – and the need for continual consideration of programs to fill gaps. She told Exchange, "We partner with Cambridge Self-help Food Bank, and together, we are working with 100 community programs, everything from emergency food hampers to community meals to shelter residential programs to outreach and snack programs – a wide range of programs in all parts of the community. We work to make sure they have the supplies they need for whatever the program is they are delivering to the people in the community. We work together as a network to look at where the needs are in the community, where there are potential gaps, where things might be changing, where people might be challenged accessing the programs, so we either help existing programs build their capacity or we examine new opportunities."

Township services

Although the two major food banks do connect with many of the food programs in the region, many of the programs are also doing their own things to meet the staggering need.

Nutrition for Learning is one example of an organization that sources its own food supplies.

In Wilmot and Woolwich townships, there are local organizations that include food supply programs, and which tend to use the Waterloo food bank as a warehouse for supplies raised locally.

Trisha Robinson is executive director of Wilmot Family Resource Centre in New Hamburg. She says their food bank supplies about 60 food insecure families, providing food hampers that follow Canada's Food Guide.

The organization also has a program called "Lunch Crunch" – parents of school children come to the centre, where "we provide fruits and vegetables to meet the daily requirements of a child." The Wilmot centre also operates a food cupboard in Wellesley.

Robinson echoes the comments of everyone in these organizations, that there is no obvious common denominator among people who are food insecure – they are families, children, seniors, people with disabilities, low income people, people on E.I., "and some with no income at all." All that have in common is, they do not have reliable access to, or resources to obtain, nutritious food. Or they wouldn't, were it not for the visionaries, volunteers and donors who are demonstrating, in the words of Kelly-Sue Oberle, that "they are part of a community that cares about them." X

EXCHANGE RATES MAY BE UNPREDICTABLE, BUT YOUR BUSINESS DOESN'T HAVE TO BE

And using that information to fill up "the cracks"

BY PAUL LENNOX

.As we all know, the currency markets can be volatile with the US dollar often moving up or down 10% or more in just a few months. As a matter of fact, over the past 25 years there have been 10 years when the US dollar has appreciated at least 10% and 8 years when it has fallen at least 10%. Moves in excess of 20% are not uncommon.

This fluctuation in the US dollar presents businesses with a dilemma; if you're an importer, how do you know when to buy your dollars? Or, if you're an exporter, how do you know when to sell your dollars? Should I buy (or sell) now or wait to get a better rate, but risk getting a worse rate is a common question? We work with hundreds of companies in different industries and there are many "right" answers to this question.

For most businesses it is important to protect budgeted or expected USD cash flows (receivables or payables) from big adverse dollar moves. However, most businesses also want to participate when the dollar moves in their favour. EncoreFX excels at developing and implementing foreign exchange strategies to give clients peace of mind by balancing these opposing protect and participate preferences.

Yes, we have clients who want both 100% protection and 100% participation and, yes that is achievable, but at a cost. Many businesses are in the 50/50 camp. They want enough protection to provide a cushion against a really bad dollar move and they are willing to give up some participation in a favourable move to achieve that balance with a zero-cost solution.

Of course, we also have clients that require 100% protection – they are often large project-oriented businesses and just need to lock in an exchange rate to protect their margins on a contract. At the other extreme, a produce importer is able to change their pricing

Steve Kulchyk, Allison Gramlow and Shannon Coffey

on the fly in response to exchange rate fluctuations so they require no currency protection but value timely execution of their USD purchases.

The common theme for all clients is that the right strategy for balancing their foreign exchange protect/participate preferences is driven more by internal business factors rather than trying to predict the next move in the dollar. What is the impact on the company's earnings if the dollar rises or falls 10%? How reliably can you forecast your US dollar payables or receivables over the next 6 to 12 months? Can you comfortably buy or sell some of your dollars in advance, in the forward market for instance, so you always have a sufficient cushion?

At EncoreFX we work with businesses across Canada to help them save time, money and stress related to their foreign exchange dealings. Larger companies have internal treasury expertise and access to the services of the leading global foreign exchange banks. We bring that level of expertise and service offering to smaller Canadian companies that think big.

Learn more from our local experts Allison Gramlow and Steve Kulchyk at 226-241-6669 or 1-833-307-4043.

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MEASURING WELLBEING THE REGION

And using that information to fill up "the cracks"

BY EXCHANGE MAGAZINE

How are things?" That's a pretty common question – and most of us know that, if we were to truly offer a complete answer, it might take a while. "Things" are often quite complex.

If that's true for individuals, imagine how complicated it gets when the question is "How are things in Waterloo Region?"

In fact, how can you even begin to answer the question?

Enter Wellbeing Waterloo Region, a collaborative effort on the part of a large number of the public entities in the region. Wellbeing Waterloo Region exists to answer the question – and first of all, to develop a methodology that means the answer will be valid and useful to organizations who want to help provide answers of things in the Region aren't as good as they might be.

Lorie Fioze is manager of strategic planning for the Regional Municipal of Waterloo, but she is currently seconded, half-time, to be the convenor of Wellbeing Waterloo Region. She's enthusiastic about what the collaborative is accomplishing, what is being learned, and most importantly, what is being done with the information gathered.

She told Exchange that Wellbeing Waterloo Region was created because, although there are many fine organizations in the community meeting specific needs, "overall, there are still people falling through the cracks, and we're not a community where everybody thrives."

The answer – or at least, the beginnings of an answer – were to bring together all of the social service groups "so collectively, we can move the needle on wellbeing, we can pool our efforts, and work differently to bring change."

The first challenge was to identify key needs in the community – the "cracks" through which people were falling. Doing so was, and continues to be, a multi-faceted endeavor.

The collaborative went out and listened to the community. "We engaged the public in a year and a half process. We did surveys, focus groups, community forums. We did outreach to groups that might not participate in a typical community forum event."

But that is only one of two ways Wellbeing Waterloo Region gathered information. Says Fioze, "Its' really been driven by public engagements and data."

And where do they get the data? She explains, "We looked at measurement frameworks from across the globe, and we landed on the Canadian Index of Wellbeing, which is through the University of Waterloo." Dr. Bryan Smale is director of the Canadian Index of Wellbeing, and Fioze and her colleagues were coached by Smale for over a year, as they developed a list of 194 "indicators of wellbeing… issues that are important in our community."

When it came time to do the first evaluation of wellbeing in the region, says Fioze, it became clear that not all 194 indicators could be factored in at the outset. "We started with 80 indicators which we could get now… that's the quantitative stats, the hard data."

> "Overall, there are still people falling through the cracks, and we're not a community where everybody thrives."

But they didn't use raw data. They took their findings, "and we worked it through the community and came up with how we pick the top priorities."

Three concerns emerged on top – healthy children and youth; affordable housing; and social inclusion. Even those felt overwhelmingly broad for a first effort, so "we wanted to narrow down the focus a bit," explains Fioze.

For example, with affordable housing, "we narrowed the focus down to chronic homelessness…. We heard the public say loud and clear, that we can't be a thriving community if we have people living on the streets." So the outcome, so far, is the creation of "a catalyst group" bringing all the partners involved in this issue together to develop a common strategy and collaboration action.

When it came to the healthy children and youth priority, Wellbeing Waterloo Region learned that another collaborative group was putting together an application for a $50 million smart cities federal grant. WWR made all their collected information available to the smart cities group, who saw this was an ideal element to their grant project, because "part of the requirement for the grant is they want to see some kind of innovation or infrastructure that will help make your city smart, and will address a social issue" – in this case, the issue of high school graduation rates and the need to engage children and youth. Results of this grant application should be known by the end of June.

Social inclusion was the third priority identified by WWR, and Fioze is blunt about the reason this is important. "We heard across the board was that in our wellbeing system, the agencies, the providers – there were all kinds of barriers around racism, homophobia, ageism, ableism, all the 'isms'. People said if we could just get our existing services to be aware of that, and break down barriers for groups that aren't doing well, that would be like light years.

"So the first action was, we offered a series of eight different trainings for all our working groups. Two hundred and forty five people have been trained in health equity. We're hoping this will get people thinking differently."

Wellbeing Waterloo Region has just completed a new survey, incorporating more than 80 of the wellbeing indicators, and Fioze believes these findings will reveal more "cracks" that can be addressed more effectively.

But she admits that results can seem confusing. For instance, most recent findings by WWR show that 75% of regional residents say they are satisfied with life in general, but 40% struggle to juggle work and non-work activities, and 40% report that someone in their family struggles with mental health issues. She says, "Overall, we look really good, but underneath, we're paddling really, really hard. Work is becoming more complex, more demanding, less time with family, less time with friends, less time for socialization, even people who are doing well financially are doing less well in their wellbeing."

She adds, "Those who have no money are doing even worse." In fact, WWR's latest date show that 9% of the population struggles to pay their bills on time, and 20% have two or more jobs.

A lot of the resources for Wellbeing Waterloo Region comes from

> "We have very tenuous funding because of the province. Now we only have funding up to the end of this year."

the collaborators – Fioze stresses that although she is on loan from the Region, this is not a regional project, it is a genuine joint effort. The funding for the most recent survey comes from 16 partners – the region, the seven local municipalities, the Crime Prevention Council, the Waterloo Region Police, the Local Health Integration Network, the United Way, three community health centres, and the KW Community Foundation.

Fioze gives a shout-out to the Community Foundation. "The KW Community Foundation has been amazing, they've been with us from the very beginning."

Today, it's not the beginning that Fioze is focused on – it's the immediate future. Provincial government changes have meant "we have very tenuous funding because of the province. We were all set to get a Trillium grant and then everything went by the wayside with the new government. So now we only have funding up to the end of this year. We're trying to figure out how we sustain this – it doesn't need a lot. We have a bare bones budget. We are looking for funds to try and sustain us after December."

For more information, visit www.wellbeingwaterloo.ca. X

Silicon Valley of the North?

We don’t think so.

creativecapitalofcanada.ca

Welcome to the Creative Capital of Canada

BY PAUL KALBFLEISCH

Like many business people in this community, you are probably wondering what Waterloo Region will be like in the future and what the path to continued success looks like.

There are many factors that help create economic success and wealth for a community. But time and again the most important factor is the creativity and innovation of its people. New York, San Francisco – even Austin Texas, are leaders because of the creative talent that resides there.

When you define creativity as the ability to solve problems with fresh perspectives, Waterloo Region has proven this to be true as well. 100 years ago creative minds turned our community into an industrial powerhouse. Another generation of problem solvers led our transition into the innovation economy. Kaufman, Breithaupt, McCulloch, Krug, Bauer and Lazaridis were creative and collaborative. Their inventiveness was enhanced by hundreds of creative people on shop floors and within a community that found ways to support growth. They gave birth to Hush Puppies, Crown Royal, artificial cattle insemination, Tiger Brand, Bauer Skates, The Blue Box, Home Hardware, BlackBerry, the University of Waterloo and a few Nobel Prizes to name just a few successes.

Today we are faced with the job of positioning ourselves in the very competitive innovation sector past leaders brought us to. Without question we will need to attract more creative minds and we will need a strategy for retaining home grown talent. We’ll need a unique message that the world will find compelling. And, we will have to be more confident, prouder and louder that we have been before.

Loud pronouncements of our achievements may make some people in the community uncomfortable. We tend to be practical and humble. But consider this – other communities with a track record like ours would have statues, plaques, signs that say “Home of…” and a few horns proudly blowing. There is a very logical and practical reason for that – what you celebrate you attract and what you don’t celebrate you forget and eventually lose. It is simply the way cultures work.

It is that insight, and the opportunity it holds, that has given birth to a social movement among local businesses and citizens focused on encouraging confidence and celebration of what led to Waterloo Region’s success – problem solving creativity.

The movement started out as a collection of ideas, concerns and conversations and is now taking shape in social media. One of the

WATERLOO REGION

The Creative Capital of Canada is right here... in all of us.

early, and loud, supporters of the movement is HIP Developments.

"Years ago, Austin Texas audaciously claimed the title 'Live Music Capital of the World'. Then they audaciously set out to make it so." claims Scott Higgins, President of HIP. "Their hard work to build a confident and vibrant community, that attracts creative minds, has paid off as they successfully compete against larger cities in the innovation economy. Considering our track record, why can we strive to be the Creative Capital of Canada?"

And so, the Creative Capital of Canada movement was formed; a growing group of people who feel it is time we proudly tell the world about our unique creative problem solving spirit.

The group champions the idea that creativity is an attribute found in all of us. It is the collaborative process of repetitively working though a challenge as you move closer and closer a new solution. It happens every day in our community in the form of cooperative alliances between competitors and open-door policies towards immigrant families. Our unique creative chain reaction occurs in shared workspaces and technically advanced factories. It is giving birth to new ideas, products and new forms of artistic expression. It also explains why we have 15 patents granted per 10,000 residents…11 times the national average! We need to acknowledge that creativity in each other. When we do we will see an explosion of inventiveness in every corner of the community.

Waterloo Region has developed a reputation for being makers and innovators. It may sound odd to say this, but it is critical that we become celebrators as well. Attracting and retaining world class talent is a challenge we must meet head on because, while we have been blessed with many success stories, we also have experienced some sobering reminders that the innovation economy does not hand out many second prizes. It is brutally competitive and it is impatient.

Creative Capital of Canada is an effort to show the world, and ourselves, that we value the innovative minds that improve life. We celebrate the people who don't use the words "good enough" – people like Mark Yantzi who began the restorative justice movement that has influenced countless individuals and may yet transform the way the world thinks about and deals with crime.

Imagine a Waterloo Region in which future generations don't have to leave home to change the world because they are surrounded by a community that supports and stimulates them. A community that also does not settle for good enough.

Think about it. Who wouldn't want to say they are from the Creative Capital of Canada.

Paul Kalbfleisch is a strategy and marketing consultant. He specializes in the articulation of bold visions and providing creative choreography for complex initiatives. Paul is a supporter of the Creative Capital of Canada movement.

HERE ARE SOME VERY SIMPLE WAYS YOU CAN BE PART OF THIS MOVEMENT

• Movements start with stories and they continually grow as more people find commonality in the stories they tell. So a good place for you to start is by learning about the many Waterloo Region creativity stories. Creativecapitalofcanada.ca has been set up for that very purpose. There you will find past and present examples of creativity from every corner of our community. On the site you can also add your name or company to the list of people who are proud of what goes on in the region.

• By no means does the site include every story. The movement needs your stories too. Consider the innovative problem solving things you or your organization does? Add them to the site. Or perhaps you know some brilliant unsung creative mind that the community and the world needs to hear about. Add it to the growing list of stories.

• Engage with other movement members on social media and follow #creativecapitalofcanada. Links are found on the website.

• You can also start celebrating today. Give some thought to how you could incorporate pride in the Creative Capital of Canada into your organization's communications and marketing.

• It is important to note that those of us who are supporting this effort are not an official group. There is no formal "logo" or tight rules. Followers don't need to seek approval. Feel free to be creative in how you express your support for the Creative Capital of Canada. HIP Developments has produced their own video expressing the belief that creativity is in everyone. There will be fun Creative Capital of Canada activities at the Summer Lights Festival in downtown Kitchener this summer. This is a celebration – not a taskforce.

OUR JOB IS TO PRODUCE GOOD COMPANIES

Grand Innovations in Cambridge launches as the first sustainable accelerator centre in the region

BY PAUL KNOWLES

Tim Ellis

Tim Ellis is determined that Grand Innovations will live up to its name – that it will truly be grand, and that it will be innovative.

The "grand" part may have been a no-brainer – Grand Innovations is located at 96 Grand Avenue South in Cambridge. But Grand Innovations is "a research and development centre for industry" – in other words, yet another accelerator/incubator facility – and being innovative in this increasingly crowded environment is not an easy task.

But Ellis, who is CEO of Grand Innovations, is convinced his new facility is on the right track. It's different, and innovative, in a number of ways, he says.

"It's the first sustainable model for this type of centre in the region," points out Ellis. He should know about the region – Ellis is former CEO of the highly successful Waterloo Accelerator Centre. He has also been involved in entrepreneurial support programs in countries around the globe, including Australia, Bosnia, Vietnam, Serbia, Albania, the United States and Canada. Ellis was awarded an Honorary Doctorate of Science for his efforts building a world class Accelerator program and vibrant knowledge based ecosystem in Australia.

> "It's the first sustainable model for this type of centre in the region."

So he brings a tonne of experience and vision to his new role at Grand Innovations, which is located in the Gaslight District, the ambitious brownfield redevelopment project spearheaded by HIP Developments. The Grand Innovations building has been redeveloped by HIP, and Jody Schnarr, CEO of Fibernetics.

The short-term key to making Grand Innovations sustainable, explains Ellis, is "our rental model." Established companies will open satellite, innovation-oriented offices at Grand Innovations, where a corporate "innovation zone" costs $3,000 a month.

At the same time, start-ups – and even pre-start-ups – can have a place at Grand Innovations at a fraction of that cost. There is space for about 25 start-up enterprise. Start-ups can have between one and six desks in that section of the re-purposed former Tiger Brands warehouse for $100 per desk per month. And prospective entrepreneurs just starting to develop their vision are also welcome in a common area.

Says Ellis, "We're going to take them earlier [than the Accelerator Centre], when they are conceptual."

Ellis says there will be a second stage to establishing sustainability – eventually, Grand Innovations will hold equity in successful client companies.

Sustainability is one unique element of Grand Innovations. There are more – like the focus on working with advanced manufacturing companies, not only digital enterprises. Says Ellis, "we're going to focus more on lower-tech things, like advanced manufacturing." One company involved from the get-go is Cambridge's own ATS Automation, although Ellis quickly notes that other soon-to-sign-on clients are coming from Toronto and Brantford.

Ellis notes that although Grand Innovations is working with advanced manufacturing, that does not mean the facility is not concerned with cutting edge technology – a key goal is to facilitate "the digitization of manufacturing."

Ellis maintains that manufacturing is "an industry we're not serving well," when it comes to R&D and innovation support. "It's a niche that's not really being served in our community right now. And that's the whole reason I am here."

The Cambridge environment

And one other factor that makes Grand Innovations unique is the eco-system in which it is being developed – the city of Cambridge. Ellis believes that Cambridge has a unique environment, nurtured by a longstanding manufacturing sector, and influenced by the city's traditional – if stereotypical – role as underdog in the region. "Cambridge," he says, "is perfect."

He is determined to leverage the Cambridge mindset; his goal is that Grand Innovations will be a significant influence on growth and development in the city.

A year from now, he predicts, "we will have a foothold on the innovation side of things. The facility will be close to being full." And by the way, he has no intention of accomplishing that by poaching clients from the Waterloo AC, or Communitech; in fact, "I don't want to take people from the AC or Communitech," he insists.

"In Waterloo Region, we have drank our own Koolaid."

Looking farther ahead, Ellis says, "In 10 years we can build the entire ecosystem in Cambridge. It starts here."

It's an ambitious goal for a facility that, at time of writing, had two client start-up companies on site, and two staff members – Executive Director Jennifer Fletcher, and Ellis. Fletcher is full time; she came to Grand Innovations in


Jennifer Fletcher

February from her position as Associate Director of Applied Research and Entrepreneurship at Conestoga College. Ellis, at this point, is part-time but working toward devoting all his time and energy to Grand Innovations. The facility only opened in January of this year.

The city of Cambridge has stepped up to help in the launch of Grand Innovations, with a

Continued on page 39

INVESTING FOR IMPACT: ITS TIME HAS COME IN WATERLOO REGION

BY LYNNE SHORT

In 2010, a group of ten Canadians (including the Rt. Hon. Paul Martin, Waterloo Region resident Tim Jackson, and eight other individuals with expertise in the charitable and financial sector) were approached to form the Canadian Task Force on Social Finance by SiG (Social Innovation Generation), a national partnership of organizations focused on understanding, catalyzing and implementing transformative social innovation. They had been following the UK Task Force that was created 10 years prior, and felt Canada needed to make strides in this area. Benefiting from the work already done in the UK, and the additional learning gathered from progress in the US, the Canadian Task Force reached consensus that Canadian charities and Not for Profits should be allowed to be more creative, and not have restrictions on their activities. An outcome would be changing regulations to provide them with the opportunity to have ancillary sources of revenue to run their charitable organizations. "One of the options we considered was the large amount of capital that was held by pension funds, and to a lesser degree, by foundations across Canada," noted Tim Jackson, CEO, SHAD Canada and current Chair, Kitchener Waterloo Community Foundation, Social Finance Committee. "We recognized that changing the way pension funds operated might be a longer process, but ingrained in the mission of foundations is the goal of doing more social good. As a result, one of the key findings of our 2010 report was that Canada's public and private foundations should invest at least ten percent (10%) of their capital in mission related investments (MRI) by 2020. The belief was that foundations could be the role models for pension funds and other sources of capital to be deployed for social benefit."


Tim Jackson

Fast forward to 2019 – and Kitchener Waterloo Community Foundation (KWCF) has embraced Impact Investing (also known as Social Finance) as a complement to grant making to drive greater impact!

"KWCF's Board approved the use of $4 Million of their portfolio to be invested for impact in order to channel more dollars into the community, while earning financial returns that drive our grant making, explained Elizabeth Heald, President & CEO, KWCF. "In addition to resonating with our traditional donor base, having the option of Impact Investing engages new investors and entrepreneurs who believe in market-based solutions to social issues. This really aligns well with our updated brand and strategic goal of Making it Easy for People to Do More Good," continued Heald, "In 2018, KWCF provided 558 grants totalling in excess of $3.1 Million to 238 local charities and organizations. With 5% of KWCF's current investment portfolio committed to impact investments and an annual 4% grant distribution based on the total capital invested in endowment funds, KWCF is more than doubling its granting impact by deploying 9% of its endowment toward its philanthropic goals."

Sometimes there is confusion between Impact Investing, ESG Screening and Socially Responsible Investing, so we asked Tim Jackson to explain the differences. "Think of investing for impact as a continuum. Most people get into Impact Investing first by thinking about their investment portfolio, and excluding investments that don't match with their values. Environmental, Social and Governance (ESG) Screening and Socially Responsible Investing (SRI) Screening is the next step, and provides tools for making decisions about investments by 'negatively screening' companies and organizations based on their operating practices and/or views on certain factors. Do they manufacture weapons or tobacco? What is their position on human rights or environmental sustainability? SRI takes this one step further, and also considers if the entity is doing social good. The key component that differentiates Impact Investing is that it is a deliberate act. When an impact investment happens an agreement is made between the investor and the investee, with a contract, a financial return and measurement put in place."

"KWCF has taken a staged approach to Impact Investing," elaborated Heald. "This is a new approach so we are learning with partners. In 2017, we were proud to support two affordable housing projects with loans to Women's Crisis Services of Waterloo Region and Housing Cambridge. In 2018, we made four additional investments to Kinbridge Community Association, The Working Centre, Windmill Microlending and House of Friendship. To date in 2019, we have four applications that our Due Diligence Committee is currently reviewing to forward to our Social Finance Committee for consideration."

Elizabeth Heald

The time for being innovative in philanthropy is now according to Heald. "KWCF recently collaborated with the MaRS Centre for Impact Investing to help House of Friendship increase and enhance addiction treatment services in Waterloo Region. One component of that work was the development of a case study to assist other charities that want to consider an impact investment as part of their financing model. The case study will be available through KWCF later in 2019."

"Based on feedback from current and potential fundholders, we have recently developed a Donor Advised Fund – Invested for Impact," said Heald. "Community members have come forward to us expressing interest in having 100% of the capital they donate placed in a fund with KWCF and also invested for impact. These funds will be added to KWCF's impact investment portfolio and the donors will make their granting decisions based on the return of that pool. Doubling their potential impact in the community!"

"The Waterloo Region is looked to as a leader on multiple fronts. So, it seems appropriate that Kitchener Waterloo Community Foundation should be amongst the leading foundations on Impact Investing," highlighted Tim Jackson. "As recommended in the Canadian Task Force report, KWCF's Board has a goal to reach 10% of our capital in impact investments by 2020. We are on track to hit that. Other foundations are a bit further along than we are – so we are learning from them. We won't force it if the social and financial economics don't line up. But – we have received the signal from the community that the time is now, and we will take on that challenge." www.kwcf.ca

KITCHENER WATERLOO COMMUNITY FOUNDATION

HOUSE OF FRIENDSHIP'S EXPERIENCE WITH A COMMUNITY BOND IMPACT INVESTMENT

Q&A with John Neufeld, Executive Director, House of Friendship

1) Why did your leadership team and Board decide to offer a community bond as the financing vehicle to add a second floor to 562 Concession Road in Cambridge, your new addiction treatment facility?

Our original plans to renovate the site required a $2M capital campaign to which the community responded very strongly. However, so much had changed from the time we purchased the building and started planning. The opioid crisis continued to grow along with community need. We realized that we had to do something different to meet community need and build for the future. The Community Bond seemed like a perfect fit to help raise the extra capital required as a result of dreaming bigger and adding a second floor.

2) If you were to give advice to another charity that is considering using Impact Investing to support a project, what would it be?

There is definitely an interest in this type of investing in our community. There is strong support for projects that meet community needs. The success of this community bond was about key partnerships that provide the expertise. We're not investment experts, our passion is in serving the community. Having the support of the Kitchener Waterloo Community Foundation, MaRS and community champions were essential ingredients.

3) How is your project going? If people wanted to support this impact investment how would they?

Project is going well and on target to open this summer! We're also excited to share that we were oversubscribed for the investment of $1M. However, we are still open to donations to the project. www.houseoffriendship.org

THE BENEFITS OF DONATING SECURITIES

BY SHERRI GROSZ

Many donations made to charities are in the form of cash. However, savvy donors see the benefits of donating publicly traded securities (stocks, bonds or mutual funds) as a more tax effective way to donate versus giving a cash gift.

If you own publicly traded securities, outside of a registered account (RRSP, RRIF, TFSA), that have increased in value since you purchased them, and you donate them in-kind to charity, you'll realize even more tax savings than you would with a cash gift.

When you sell the securities and donate cash, 50% of the capital gain becomes taxable income. However, if you donate the securities in-kind, the taxable capital gain is avoided, and you will receive a charitable receipt for the market value of the securities. Abundance Canada, a public foundation, has extensive knowledge and experience in assisting individuals with these types of charitable donations.

Unlike other Foundations, who will usually provide a charitable receipt on the day the funds arrive in their accounts, Abundance Canada will date the charitable receipt on the day you sign the paper work and initiate the transfer.

In addition, you do not need to complete separate security transfers with each charity you want to benefit. This means less paperwork and hassle for you. At tax time, you only have one donation receipt to process and that one donation has benefited multiple charities.

For example, a donor has 1,000 shares of Royal Bank to donate to four charities. The fair market value of the shares is about $100,000. Each charity is to receive $25,000. If the donor chooses to use Abundance Canada to process the gift of securities, they complete one transfer form for the 1,000 shares and they will receive one donation receipt from Abundance Canada.

If the donor does not use Abundance Canada to process the gift-in-kind, they will need to send each charity 250 shares of Royal Bank, which means four transfer processes and four donation receipts.

Which securities should I donate for maximum tax savings?

You should donate securities that are held in a non-registered investment account. Investments held in a registered account, such as an RRSP or RRIF, do not qualify for these tax savings.

Consult with your tax advisor or professional advisor on which stocks, bonds or mutual funds present the best gifting opportunity. Donate the securities that have the largest capital gain to maximize the tax savings for zero capital gains inclusion for the donated securities.

Capital gains on investments held in a tax-free savings account (TFSA) are already tax exempt. Donating these investments will not generate the same tax savings as donating securities held in a taxable investment account.

What if my charity of choice cannot accept donations of publicly traded securities?

Many charities don't have brokerage accounts or the expertise to process donations of securities. Abundance Canada will process the donation of securities, sell them and distribute the proceeds to the charities you wish to support.

You can disburse the proceeds immediately or over a period of years. This works well if you want to receive the tax benefit in one year but fulfill a longer-term pledge.

Even if one of the charities you want to support is willing and able to process these types of donations, using Abundance Canada means that with one transaction you can distribute the proceeds to multiple charities.

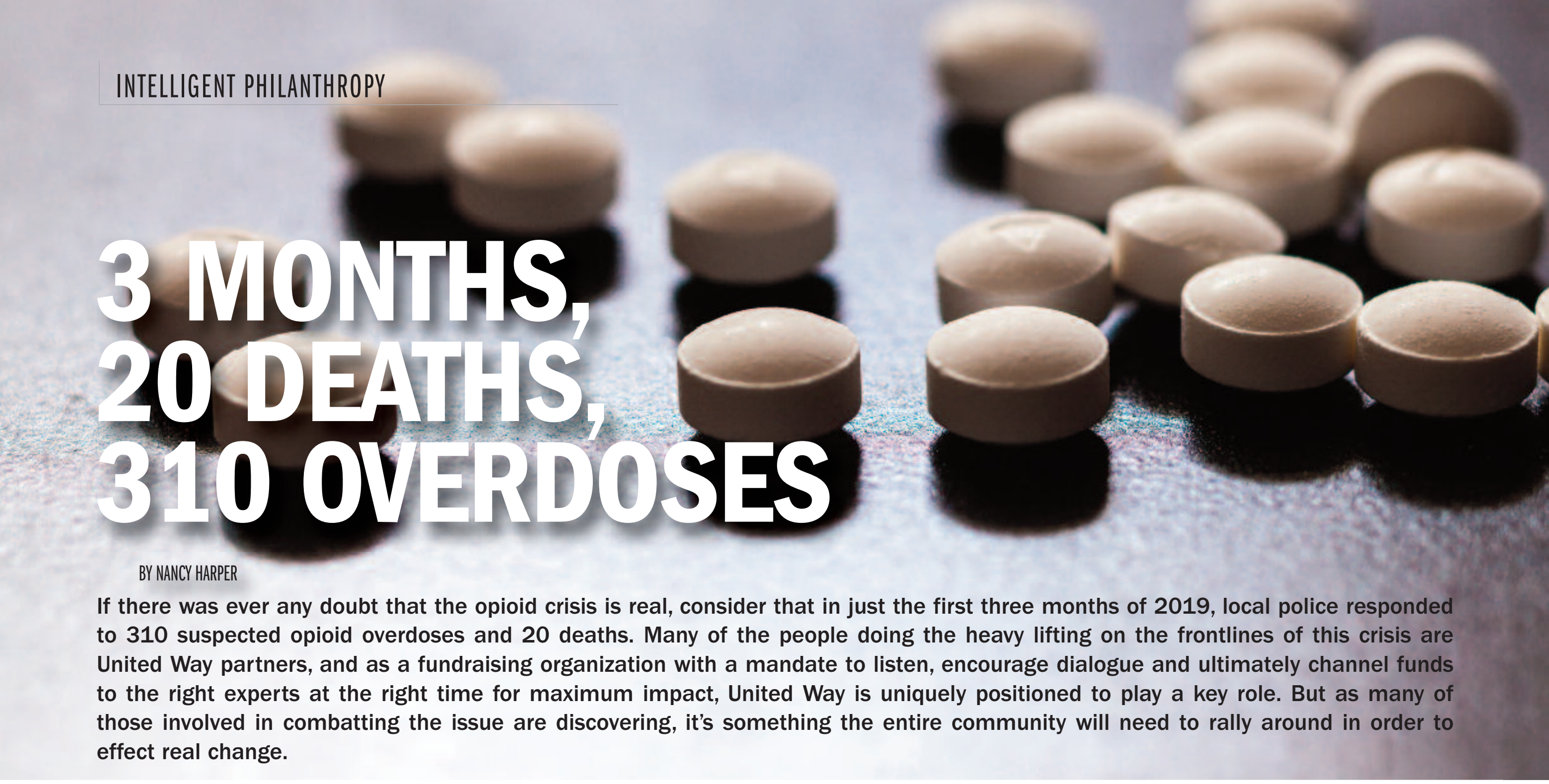
Talk to our team

Abundance Canada makes the process of donating publicly traded securities easy!

Charitable giving via gifts of publicly traded securities is a wonderful way to support your favourite charities plus realize additional tax savings over donating cash.

To learn more, visit abundance.ca or call 1.800.772.3257 to meet with a gift planning consultant for a confidential meeting, at no cost to you and with no obligation.

Sherri Grosz, CFP, is a gift planning consultant with Abundance Canada. Since 1974, we have helped individuals to be smart with their generosity to charity, during their lifetime and through their estate.



3 MONTHS, 20 DEATHS, 310 OVERDOSES

BY NANCY HARPER

If there was ever any doubt that the opioid crisis is real, consider that in just the first three months of 2019, local police responded to 310 suspected opioid overdoses and 20 deaths. Many of the people doing the heavy lifting on the frontlines of this crisis are United Way partners, and as a fundraising organization with a mandate to listen, encourage dialogue and ultimately channel funds to the right experts at the right time for maximum impact, United Way is uniquely positioned to play a key role. But as many of those involved in combatting the issue are discovering, it's something the entire community will need to rally around in order to effect real change.

A Crisis of Epic Proportions Is Unfolding In Waterloo Region

The basketball net in the driveway is one of a thousand little things that had once brought them so much joy. Now it was just another stark reminder of unbearable loss.

Nearly six years have passed since Christine Padaric's 17-year-old son Austin died of a morphine overdose at a party in Elmira. The family has since packed up and left their home in Heidelberg and moved back to Waterloo to make a fresh start, the basketball net and everything around it simply too painful to keep looking at every day.

The memories linger, of course. Austin will forever be the beloved teenager with a ton of friends and a heart of gold. The boy who loved to skateboard. The hockey player and snowboarder. The one who always looked out for the little guy.

The night of the overdose, he and a handful of other young people crushed and snorted morphine pills. When Austin became distressed and started vomiting, they put him in a cold bathtub, hoping he'd sleep it off. By the time an ambulance was sent for at 10.30 the next morning, it was too late.

Padaric understands that there is widespread shame and stigma surrounding opioid-related overdoses and deaths. But her story is different. Austin wasn't an addict. And she believes that if the others who were doing drugs that night hadn't been afraid to call 9-1-1, her son would be alive today.

"I'm not shy to admit that Austin smoked a lot of pot," she says. "But I believe he was in the wrong place at the wrong time. I believe it was peer pressure and a one-time deal that turned out very, very bad."

After her tragic loss, Padaric threw herself into learning as much as she could and educating others about opioids and other drugs. Six years later she's still talking, although it's not always easy to get an audience willing to listen. Parents – and by extension schools – are often reluctant to hear what she's got to say.

"If it could happen to my family, it could happen to anyone," Padaric says. "They say the ambulances are going out to the suburbs and the nice homes just as frequently as they're going to the downtown core. Overdose and drug use do not discriminate. You can't profile someone. It's everywhere."

Stigma and shame

As a community leader that recognizes and responds to crises while empowering others to be proactive, United Way Waterloo Region Communities is keenly aware that the opioid crisis is being felt in each of the seven communities it serves: Cambridge, Kitchener, Waterloo, Wilmot, Woolwich, Wellesley and North Dumfries.

A little over a year ago, United Way led a community conversation about the shame and stigma surrounding opioid-related overdoses and deaths – and at the event's conclusion, CEO Joan Fisk announced a commitment to raising $50,000 for an Opioid Fund to help address the issue.

That initial goal was surpassed in November 2018, thanks to a substantial response to the organization's Giving Tuesday campaign which, along with $10,000 in matching funds provided by a generous United Way donor, created an initial investment of almost $60,000 to fight the opioid crisis.

The Opioid Fund is one of 4 targeted funds developed by United Way to provide donors the opportunity to direct their gifts to a cause they are passionate about. This new approach to fundraising not only gives donors greater control over where their dollars are invested, but also gives United Way the agility to respond to issues as they emerge.

The organization's other three funds - Ending Isolation, Supporting Youth, and Fighting Hunger – address the isolation felt by seniors and individuals with disabilities; the overwhelming need for mentorship and mental health support for vulnerable youth; and the food insecurity experienced by 1 in 10 households across the Region of Waterloo.

"This crisis is very real," Fisk says. "We are trying to lead the conversation to put some more humanity into it. The reality is that opioid abuse is complex. This is a really gritty subject that we can't ignore. It's something that's so desperate, which is why we're trying to partner with people who understand the problem and to work with the community to support people who are going through it."

As fundraisers embedded in the communities it serves, United Way's goal now is to determine how best to use a targeted funding approach to support and elevate the work already being done.

Half the money has already been granted to The Working Centre to support the collaborative Water Street House Network. The Water Street House will be an inclusive, welcoming space where people who use substances can rest and access harm reduction supports, primary health care, and a relationship-based approach to mental health and addiction. In the coming months, United Way will seek other projects in order to grant out the remaining $30,000, ensuring support is available for programs and services that find ways to tackle the crisis, and most importantly, save lives.

In her role overseeing how funding is distributed, United Way Senior Director of Community Investment Nancy Bird focuses on careful stewardship of donor dollars. "United Way doesn't pretend to have all the answers," she says. "We give out a significant amount of money but we're just part of the puzzle. Understanding how that part fits with the rest of the puzzle is really important."

United Way, she adds, is open to new initiatives through new and existing partners. "We as leaders in the community need to get to the table and find out how are we going to fundamentally work differently together to change the experience for these individuals," Bird says. We've seen as a community that once we start talking about it, it gives more people permission to talk about it.

"Most people are using drugs to end the pain that they are feeling, whatever that stems from. Whatever they start with, at some point if they are in the throes of addiction, they are not the same person anymore and they are choosing whatever is most available, easiest to find, affordable.

"Sometimes we feel we're a little bit immune to some of these issues in Waterloo Region. We're not. This is a much bigger issue than people thought because it's been hidden. This is not a one-agency fix. It's not a shelter problem. It's not an addiction-services problem. This really is a community issue."

Opioid use growing dramatically

According to Region of Waterloo Harm Reduction Manager Grace Bermingham, the region has seen a dramatic increase in the use of opioids. Since 2003, the number of opioid-related deaths has increased by 94 percent, and in January alone, local police responded to 75 suspected opioid overdoses and 10 deaths – the highest number ever reported in one month.

As someone on the frontlines of the issue locally, Bermingham has been deeply involved in studying the complex reasons behind drug use. She believes misinformation is a huge part of the problem.

"This issue is affecting people across the socioeconomic demographic," she says. "Overdoses can happen to anyone: people who have been using drugs for a long time, a youth who's using drugs for the first time, people who have been in rehabilitation and then go back to using after a period of abstinence."

Which begs the question: If the issue cuts across every demographic, why aren't people talking about it?

"I think stigma is the No. 1 reason," Bermingham says. "There's a lot of shame in being addicted, and with that shame comes an unwillingness to speak with loved ones and health-care providers. There's a lack of understanding about what drug use is and why it happens. It's very complicated. There's a fear in being identified as someone who uses drugs and being able to openly talk about it.

"We need to reframe this as a public health issue. It's going to take that to really begin to make some long-term changes. If we are not able to do that and the stigma is perpetuated, all the issues we're seeing right now will grow and it will be more difficult to make the inroads we need to make a change."

Learning from tragedy

Six years after her own heartbreaking loss, Christine Padaric is still working to make sure some good comes from her family's tragedy.

While dedicating her time to support groups and education initiatives, she was also instrumental in getting what's known as the Good Samaritan Drug Overdose Act (Bill C-224) passed into law. Bill C-224 essentially means that anyone who calls 9-1-1 in an overdose situation will be immune from prosecution.

Padaric would like to see a more intentional push to educating young people before they get into their 20s and 30s when, she says, it's simply too late.

"I don't see anything going toward education," she says. "It's a struggle to get into schools because there's just no funding. Parents need to push

Nancy Bird and Joan Fisk

for it. We've got to get to the kids when they're young. I believe in educating kids when they're open to hearing about it. It still shocks me how many people don't know the Good Samaritan Act exists and are still afraid to call."

She also wants people to know what to do when someone is overdosing. "You need to be able to recognize it for what it is and know what to do," she says. "In Austin's situation there were seven people who sat around and watched Austin and hoped and prayed he would sleep it off. That's a fallacy. It's not something you sleep off. They were afraid to call 9-1-1. They were under the influence themselves. There were so many factors. But if you make that decision beforehand – that you're going to do the right thing – you're more likely to do it."

Cause for optimism

According to Bermingham, there is reason to hope. She points to the parallels in how society once treated mental health, and how change was a long time coming. "It took a lot of work to have people talk about mental illness as a health issue," Bermingham says.

"This is not an 'us versus them' issue. This crisis has been incredibly painful for many people who've been touched by it either personally or through a loved one. People have experienced a lot of loss and trauma.

"But what I'm also seeing in our community is some great cross-sector planning – collaboration that has been strengthened between public health, housing, policing, paramedic services, school boards, municipalities – and I think this is incredibly optimistic. Waterloo Region has always been good at collaborative planning and developing strategies that cut across those sectors. Through this work, our community has really rallied."

ARE YOU THE ONE?

United Way Waterloo Region Communities

United Way's 2nd Annual Spirit Awards, which will take place on May 9th at Whistle Bear Golf Club in Cambridge, will honour local volunteers and donors dedicated to building a community where everyone has the opportunity to reach their full potential. Business and community leaders, dignitaries, politicians, partner agencies and members of the public are invited to attend the event, which features a reception, three-course dinner, cash bar and awards ceremony honouring rising stars, community leaders, outstanding corporate partners and volunteers.

To read more about the people and stories that drive our work, please visit http://www.iamtheone.ca/

Nancy Harper is Editorial Content Creator, United Way Waterloo Region Communities

"VERY MUCH FOCUSED ON LIVING"

New Hospice of Waterloo facility will enable even more community support for people in palliative care

BY PAUL KNOWLES

It's right there on the folder promoting the soon-to-be-built Gies Family Centre: "To every thing there is a season, and a time to every purpose…"

That quote, from the Biblical book of Ecclesiastes, continues: "a time to be born, and a time to die." If you don't know it from the Bible, you probably recognize it from the Pete Seeger song, "Turn, Turn, Turn", made famous by the Byrds, and subsequently recorded by musicians ranging from Bruce Springsteen to Dolly Parton.

It's especially apt as a motto for the Gies Family Centre, which when completed will be the new headquarters of Hospice of Waterloo, and which will include 10 residential beds for palliative care patients – the first time Hospice of Waterloo will provide residential care, since it was founded 25 years ago.

Hospice of Waterloo serves between 1300 and 1400 palliative care patients a year, reaching them in their homes and other facilities.

The fact that the hospice has existed for a quarter-century without providing beds for palliative care patients may come as a surprise to people assuming that "palliative beds" and "hospice" are synonymous. And there are two facilities in the Region of Waterloo – Lisaard House in Cambridge, and Innisfree House in Kitchener – whose primary focus is on residential care for the dying.

But even when the Gies Family Centre opens (which is planned for November of this year), residential care will still only represent a portion of the services offered by the Hospice of Waterloo. Many of those services are, and will continue to be, offered to and through the other two hospices in the region.

Judy Nairn has been executive director of Hospice of Waterloo since 2012. She told Exchange that the hospice was started 25 years ago by Lucille Mitchell, who envisioned it as "a community outreach hospice service."

And such it has remained – and will remain, even with the new facility and the residential beds. That's because the hospice has evolved to offer a wide variety of services – to the dying, to their caregivers, and to volunteers and support workers throughout the Region.

The new facility will have 10 beds – Innisfree also has 10, and Lisaard has six, all reserved for cancer patients.

The new Gies Family Centre beds will be available to anyone needing a palliative bed. However, says Nairn, the maximum number of people likely to be served in residence each year would be

Judy Nairn

200-250. But Hospice of Waterloo actually serves between 1300 and 1400 palliative care patients a year, reaching them in their homes and other facilities. To do that, Nairn's organization has about 250 volunteers who provide that support to people in homes and long-term care. "They support them through their end of life journey," she explains.

The Hospice of Waterloo has a team of 24 employees, who handle duties ranging from volunteer coordination, assessment and matching of patient and volunteer, schedule coordination, and administrative duties. Hospice of Waterloo "supplies the volunteers who to into Lisaard and Innisfree," says Nairn. These are highly trained volunteers; they all receive 35 hours of training before they are assigned to support a patient, and there is on-going in-service training provided as well.

You might expect volunteers to burn-out in this emotion-laden environment, but Nairn proudly reports that "we have exceptional volunteers," some of whom proudly wear 20- and 25-year service pins.

Hospice of Waterloo has developed a full menu of services in their field, including support groups and day programs. This "community service side really fits well with the whole evolution of Hospice – it's a community response to the end of life."

And it's a response that can provide support for a much longer period than residential palliative beds. Residential beds come into the picture very near the end – around 10 days, on average, before death – whereas Hospice of Waterloo provides support services, "typically, 12-18 months," says Nairn. "It can be from diagnosis. We focus on helping them achieve quality of life. We're very much focused on living."

But for patients in a palliative situation, death is very much part of the immediate picture. And even when they are gone, they leave loved ones and friends behind – and Hospice of Waterloo works with those people, too, offering bereavement support through groups and counselling.

One service, only a year and a half old, that truly touches the heart is the hospice's "vigiling service", offered when "someone is dying, and they don't want to be alone."

So if Hospice of Waterloo is accomplishing all of this already, why is there a need for a new, $15 million Gies Family Centre? Nairn says it actually will meet a lot of needs.

She explains that there is a definite need for more hospice beds – there will still only be 26 in the Region of Waterloo, to serve a growing and aging population.

She points to projections that suggest that by 2036 there will be over 25,000 in the region over the age of 85. "That's a lot of people," she says.

She also explains that support services from family members are less possible, today, because "people don't have as large a family, and the families are dispersed."

As well, "this allows the full continuum of services," through Hospice of Waterloo, and "we will be able to expand our programming."

Construction has begun on the facility, located in the north-east sector of Waterloo, adjacent to RIM Park. Local contractor Melloul Blamey is the general contractor on the project; Neo Architecture Inc. is the architect.

> "The last thing we want is for the person who is sick to feel that they are a burden. When you are sick, you're entitled to ask for help."

The site was deliberately chosen, says Nairn, to provide a location in the northern section of the region, since Lisaard is in Cambridge and Innisfree, in Kitchener. But Nairn points out that "We serve all of Waterloo Region," including through a satellite office in Cambridge, based at Langs.

The $15 million is the capital budget for the facility; the Gies Family (who are in the construction industry), have donated $2.5 million. The Ontario Ministry of Health has kicked in $2 million – an unusual move, since the Ministry has not contributed to a capital cost program in the past. The original public sector fundraising target was $10 million, and while the campaign is approaching that amount, "we are continuing to do funding for the building itself and for the ongoing operations," says Nairn.

Ongoing operations are, of course, the challenge. Fundraisers will tell you – often and clearly – that it is much easier to raise money for a capital project that for operational costs. And the operational costs will be significant, since Hospice of Waterloo will be providing 24/7 care to patients. Staff size will almost double to between 40 and 45, says Nairn.

The hospice's annual budget is currently $2.2 million; it will increase to $3.5 million when the new facility opens. The Ministry of Health funds between 50% and 60% of operating costs. That means, says Nairn, an annual fundraising goal of between $1.2 million and $1.5 million.

She adds, "we do a significant amount of fundraising now," but that will have to be kicked up a notch.

It's important to note that the hospice services are provided free of charge to every client. "People shouldn't have to worry about that at the end of life," says Nairn. Nor should people have to be deprived of palliative support because they can't afford it. So these services are offered to everyone, at no cost.

Nairn is passionate about her organization, and about the difference her volunteers and programs make in the lives of people facing what may be the most difficult time of their lives. "The last thing we want is for the person who is sick to feel that they are a burden. When you are sick, you're entitled to ask for help."

And Hospice of Waterloo exists to provide it. X

PLANTING SEEDS OF EXCELLENCE

St. Jude's, Scholar's Hall, Spectrum Academy meeting unique needs of students from K-12.

BY FRED GORE

June 1980 – I remember it well. The month was filled with excitement, anxiety, expectation and second guessing. The month a seed was sown that would, in the fullness of time, bring to life not one but four educational ideologies. The month I resigned from my teaching position of thirteen years.

My wife, my two children and I were now facing a very uncertain future. She and I had talked about it, more me than her, for over a year. She understood and continued to provide emotional, spiritual and financial support (she continued to work nights at Kaufman's). But as much as I was the optimist she was my foil. In my speaking engagements over the years, I have been known to make light of how we cashed in my pension; how we put a second and a third mortgage on our home; how we sold our two vehicles and bought a fifteen passenger van and painted the sides of the van with "St. Jude's School", and I turned my wife's hair a wonderful new shade. From that month forward, I have only looked back several thousand times. Not with regret nor any remorse but with a sense of satisfaction and fulfilment of an easy road not taken.

The seed first brought forth a tutoring and learning assessment service known simply as Student and Family Services. This service addressed the overwhelming frustration expressed by parents trying to get their child tested. As a special education educator, I was continually caught between the system's rules and priorities and the parents' requests for help. A large article in the local newspaper recognized the significance of this service now being available outside the school system. The local boards, quoted in the same article, downplayed the need for this service to be privately available to parents. Sadly, even to this day, parents hear more often than not – "there are other children who are of a greater need and of a higher priority". As parents became more aware and more educated, they pressured Student Services to open a school which would actually implement the recommendations of the psycho-educational assessments, rather than listen to laments of large classes, not enough time in a day and lack of provincial funding.

The seed flourished and birthed a new offspring, St. Jude's School, on Phillip Street in Waterloo. St. Jude's was created to be a temporary alternative to the publicly funded educational system for bright, learning-disabled students from grade one to twelve. These students were the ones who struggled but got by each year. Their high level of intelligence coupled with an undiagnosed learning disability resulted in a disappointingly mediocre performance, which from the public system's perception is good enough. The result? Growing numbers of nice kids were just squeaking through each grade, expressing ever more frequent denials of their innate intellectual abilities. Sadly, "I'm stupid" would become a more and more common phrase in their daily communications with their parents and peers.

Parents of these students, in the 80's decade, sought out St. Jude's School. St. Jude's grew slowly, with classes of six maximum, to a population of three dozen students with ten special teachers. St. Jude's was a family with a school atmosphere where "Bring Joy to Learning" was evident every day. But the success of this little school was not going unnoticed.

As the 90's decade loomed, more and more parents wanted their child at St. Jude's. They had heard of the small classes. They had heard about homework, discipline, respect, work ethic and the success of the students returning to the system. They wanted their child to have that same educational benefit.


Bonnie and Fred Gore

My initial query to these parents was, "What is your child's learning disability?". Their responses surprised me. There was no learning issue, other than "good enough was no longer good enough". These parents just wanted their children to attend a really good private school. In response, I, politely, explained St. Jude's School's mission (bright without any learning difficulties was not the mission) and would then recommend another private school.

At this point, you must understand several mitigating factors which would influence St. Jude's School for the next ten years and beyond. First, there was the 1989 recession. Second, St. Jude's School never has fund-raised for itself. St. Jude's is operated as a business – charge a fair tuition and don't expect your customers to donate to make ends meet. And finally, St. Jude's had an accountant who continually pointed out that more and more people want to give me money. So, I began to accept into St. Jude's, those students who not only did not have any learning difficulties but were bright and motivated to excel. Within two years, St. Jude's School ballooned to a population of one hundred, with a growing wait list. The school's facilities on Phillip Street could only accommodate the 100 students and the wait list would soon reach another one hundred. St. Jude's was a success. Or so I thought, for a year or two.

That seed I had planted over a decade ago once again was stirring. A growing sense of personal discontent was causing me to analyse the growth of St. Jude's. Class maximums had grown from six to twelve. My parents, students or teachers were not aware of my concern – they were elated with the level of education being provided at St. Jude's School. All my students were receiving an education superior to what they had before coming to St. Jude's. It was my students with the learning disabilities who I felt were being short-changed with the doubling of the classes. I was worried that we were providing a watered-down version the school's original mission and goals.

Even though this issue was mine and only mine, I had to do something. It was clear to me that I had two populations of students with different needs and goals now attending St. Jude's School. There were the St. Jude's students and there were the other students, the scholars. The St. Jude's students needed very small classes, special education teachers, and a curriculum which would focus on the need for remediation and the goal of reintegration. The other students, the scholars, needed smaller classes than the system, excellent teachers, and a curriculum which would focus on academic acceleration and the goal of first-choice university acceptance. The seed had sprouted a new shoot as I began to implemented a plan to separate my student population in two separate and very distinct schools – St. Jude's School and Scholars' Hall.

In the summer of 1999, land was purchased in the south end of Kitchener. It is ideal for a number of reasons. First, was price. Due to the immergence of companies such as Sybase, RIM and Open Text, land prices in Waterloo had escalated well beyond my budget. Second, this particular piece of land is geographically centered in the region allowing equal and convenient access for my families from Waterloo, Cambridge and Guelph. Third, the property is surrounded on three sides by government-protected environmental lands. Standing magnificently on this property is a three hundred year old elm tree, identified as the largest and healthiest in the province. In addition, across the street from this site is the Huron Natural Area (site of the Ontario's most significant discovery of a 600 year old Six Nations settlement).

The school I had built over and over in my head for the last five years opened its doors to students for the first time in August of 2000. Seventy-five of the students from St. Jude's and approximately fifty-five students from the wait list were invited to make the move to the new school site at 888 Trillium Drive in Kitchener. St. Jude's School remained in Waterloo, for its third decade, providing hope to parents and help to students for a brighter educational future. St. Jude's was once again the school I had built two decades before – a family with a school atmosphere.

Scholars' Hall, at the other end of Kitchener, opened the doors of its newly constructed school with a huge gymnasium, science labs, art classes, a large playground and 25,000 sq. ft. of classrooms. (All accomplished without any fund-raising, I might add). I knew that Scholars' Hall had to be larger than St. Jude's but I also knew that I did not want Scholars' Hall to be a big school. Scholars' Hall is a school with a family atmosphere. In order to maintain this family atmosphere and a very personal level of service to the parents and education to the children, Scholars' Hall by necessity had to stay a small school. So Scholars' opened with little fanfare and began its gradual annual growth fuelled only by word of mouth. At all grades, JK to the end of high school, classes are not allowed to be larger than fifteen students. The total number of classes and the total population of Scholars' Hall is limited, not by its facility's capacity but by its pedagogical design.

At the beginning of the millennium, Scholars' Hall quietly began to define itself as Waterloo Region's Singular Private School. Scholars' Hall was founded to be forward thinking with a fundamental foundation. My ideas of a great school are so natural to me I am unable to identify them. A school is responsible for a child's education, not the parents – forward or fundamental? Each child needs to develop, through example and education, a lifelong work ethic – forward or fundamental? A child needs to be raised and educated in and by a supportive and nurturing community – forward or fundamental? A school needs to reflect the world and to prepare its students for the world – forward or fundamental? A school must promote personal excellence – forward or fundamental? A school needs to be responsive to the family and changing society – forward or fundamental? If parents feel that their child needs a tutor, then the school is not doing their job – forward or fundamental?

Scholars' Hall is the only nondenominational, JK to Grade 12 school in the Region. Students from all faiths and all nationalities feel equally at home at Scholars'. There are no PD days at Scholars'. There are no extra holidays. From the very beginning, children attending Scholars' Hall, JK to Grade 3, have had the option to attend school full days, everyday, twelve months a year with afterschool supervision. Homework at Scholars' Hall is given daily (5 minutes times your grade) and checked and corrected daily. If a student has not done their homework or has not done it to the best of their ability they are required to attend the HomeWork Club. In addition, each and every Friday is stay-till-its-done day. Forward or fundamental?

Scholars' Hall is a complete school. House leagues, plays, clubs and sport activities, Lower School High Tea, Middle School semi-formals and Upper School Grad proms all occur while we still easily surpass the standards of the complete provincial curriculum, starting in Kindergarten. No 'play curriculum' here! Scholars' Hall is the only high school in Canada to adopt the same semesters schedule as the universities. Following the university semesters provides a huge advantage over public students. Scholars' students not only get accepted into every university applied to, but, many with scholarship offers.

In 2015, that wonderful seed stirred again. Beleaguered and disheartened parents began to beseech St. Jude's to develop an educational program for their autistic children. Over the next two years, St. Jude's piloted such a program. As, in the past, I created a program like no other in the province. In February of 2019, St. Jude's School formally announced that its pilot program – Spectrum Academy, was now open for students. Each Spectrum Academy classroom has two trained special education teachers/ABA therapists working with three highly intelligent students in a dog-friendly, specifically designed, learning environment.

That seed sown in the past has now blossomed into Spectrum Academy, a school of necessity; St. Jude's School, a school of hope; and Scholars' Hall, a school of achievement. As Spectrum Academy beginning its first decade, Scholars' Hall beginning its third decade and St. Jude's School about to begin its fifth decade, it is my fervent goal to quietly continue to provide this singular education to the children of the Waterloo Region.

My wife (yes, she is still by my side) and I revel that we get work daily with our daughter, the Principal; her husband, one of the Vice-Principals; our youngest son, a grade 4/5 teacher; and that we see our three grandchildren, grade SK, grade 9 and grade 11, every day since Junior Kindergarten. We are so very proud of the many and continuing accomplishments of all our former students. I thank the parents of the Waterloo Region for the gift of their children and I look forward to the promise of many more wonderful children attending Spectrum, St. Jude's and Scholars' Hall.

In 1999, the Province of Ontario recognized Fred Gore for his continuing contributions to children with special educational needs.

LISTING SECTION

Welcome to the 2019 Intelligent Philanthropy 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.

Abundance Canada

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THE CAMBRIDGE MEMORIAL HOSPITAL FOUNDATION:

The Cambridge Memorial Hospital Foundation is committed to raising funds to help provide you with exceptional healthcare. Cambridge Memorial Hospital is the cornerstone of our community. We see hundreds of people through our doors every day, but numbers only tell part of our story. The new Cambridge Memorial Hospital is a game changer for Cambridge & North Dumfries providing our families, friends and neighbours with top notch facilities matched only by the talent, compassion and care within our walls. Every gift makes a difference. Help us put the best tools possible in the hands of our doctors, nurses and staff. Together we can do so much more. Charitable registration 11882 6288 RR0001

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foundation@cmh.org
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The Creative Capital of Canada

The Region of Waterloo's DNA is a combination of problem solving, collaboration and hard work. We call that "creativity" - the ability to think through a problem in a different way to come up with a better outcome.

www.creativecapitalofcanada.ca

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 our most vulnerable neighbours by delivering nutrition, physical health, social wellbeing, and other services to support aging at home. CSC functions as a centralized source for community home support services in Waterloo Region. We support each and every one of our clients and volunteers, fostering a community where everyone feels at home – valued, connected and empowered.

Rosalind Horne| Major Gifts and Engagement Lead
61 Woolwich Street North, Breslau On N0B 1M0 | *519-772-8787*
www.cscmow.org

Grand River Conservation Foundation

By supporting environmental work of the GRCA, the Grand River Conservation Foundation enriches the natural values of the Grand River watershed and encourages people to enjoy and learn from the outdoors. For fifty-four years, donors have helped kids attend outdoor education programs, built and cared for trails and nature centres, planted thousands of trees and offered funding to groups and students taking on their own conservation projects. If you love the outdoors and want to help protect it for future generations, we invite you to learn more!

Sara Wilbur, CFRE, Executive Director
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www.grcf.ca

KidsAbility:

KidsAbility Centre for Child Development and KidsAbility Foundation work in partnership in the communities we serve to assist children and youth with special needs and their families to achieve their full potential. When you include KidsAbility Foundation in your estate plans you are investing in the future of children and youth with special needs. Your gift to KidsAbility not only enriches the lives of many but creates a lasting legacy for you and your family while providing life-changing therapies and support services to children and youth in Waterloo Region and Guelph Wellington. Your gift will help to make the future bright.

Heather Curran, Development Manager, Leadership and Planned Giving
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519.886.8886 x1399 | www.kidsability.ca

Kitchener Waterloo Community Foundation

260 King St W unit 206 | Kitchener | N2G 1B6
Elizabeth Heald, President and CEO
elizabeth@kwcf.ca
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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), the www.parentingnow.ca website, leadership training and outreach for members of the multicultural community, and supports for the LGBTQ2+ community (OK2BME). We are proud to have been supporting children, youth and families in this community since 1950.

Noel Blake, Chief Financial Officer,
480 Charles Street, East Kitchener, ON N2G 4K5
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www.kwcounselling.com

MENNOHOMES:

MennoHomes provides affordable rental housing throughout Waterloo Region for households with low incomes. We believe in the life-changing impact of quality affordable housing for children, families, and seniors. Please contact us to learn how your financial support will build a stronger community for everyone.

Dan Driedger, Executive Director ddriedger@mennohomes.com
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continued from page 29

$500,000 grant to the facility. HIP Developments, which is developing the entire Gaslight District, has kicked in a million dollars, half of it a forgivable loan.

Ellis describes Grand Innovations as "a partnership with HIP. They are behind this. They really have a vision to see this work, here. I can't say enough about HIP's support in all of this."

The time is right for the whole project, says Ellis. "The rest of the core here is ripe for revitalization."

"Drank our own Koolaid"

Ellis does not mince words when he talks about the need for change in the region's incubator and accelerator system. "In Waterloo Region, we have drank our own Koolaid," he says, pointing to a local sense of entitlement. When he has worked in less developed countries, he says, "They are grateful. I enjoyed helping those people. We seem to be an entitled society."

He smiles when he adds, at Grand Innovations, "We don't bring the Kitchener-Waterloo culture, we bring the Cambridge culture. We want it to be a bit different; we want it to be about Cambridge and manufacturing, which they do well here."

Ellis says that they also want to be about succeeding – or failing quickly. He points to his personal experiences with a number of start-ups, arguing that he has learned more from failure than from success. So Grand Innovations will be selective about who is accepted into the program. Says Fletcher, "It has to be the right people for the space – but they will come."

Ellis says that he has found many key people willing to help out with the new facility. He has a small, effective board of directors, and a roster of highly experienced mentors. Mentors will work with clients to help them evaluate their plan, develop it, bring it to market… or realize quickly that it is not going to work. Ellis describes this as "accelerating them to some conclusion… to push them to success, or they're out. We're big on accountability."

He adds, "First and foremost, my job here is to produce good companies."

There will be legal, accounting and human resources experts on site, available (for a price, of course) to the client companies.

This is an exciting time to be located in the Gaslight District in Cambridge. Grand Innovations, just completed, is a spectacular 54,000 square foot redevelopment, retaining many of the intriguing features of the warehouse it once was, and now including its own public event space. The entire Gaslight area will be taking shape over the next three years, with condos, restaurants, a brew pub, a market – in fact, a complete, innovative, urban environment.

Out of the immune system

Innovation centres often seem to focus on start-ups, and that is certainly part of the mandate at Grand Innovations. But the corporate innovation groups – satellite facilities of large companies, created to allow innovation and creativity – may be even more important.

Ellis explains, "There are corporate 'immune systems' that stifle innovation. It's all about giving corporations the platform to act like a start-up, removing them from the corporate immune system" that tends to fight innovation and creativity as though they were viruses attacking the system.

It's a growing trend, says Ellis. "More and more companies are being open to it." And Grand Innovations is open and eager to working with them. X

THE HOW AND WHY OF GIVING

BY EXCHANGE MAGAZINE

Director of Velocity Jay Shaw, left, has a armchair chat with successful tech entrepreneur and philanthropist Ted Livingston

When Exchange magazine asked leaders in the not for profit and charitable community to suggest themes that were most important to them, the simple concepts of "how" and "why" people give came up, again and again. As we did our research and interviews for this edition of the magazine, we found dozens of individual examples that offer unique answers to those questions. For instance:

Ted Livingston, a graduate of University of Waterloo, founded Kik – recently described as Canada's only current "unicorn", the description of a private company worth more than $1 billion. Livingston donated $1 million to the University of Waterloo, selling personal shares in his company to raise the funds for the donation, which is creating a venture fund for start-ups in VeloCity, where he actually got his start.Livingston explained his rationale for the gift: "With few responsibilities and surrounded by other talented minds, UW students are uniquely positioned to start world-changing companies. Unfortunately, few investors are willing to bet on young entrepreneurs, especially in Canada, so getting the start-up funds they need is a huge challenge. This fund is a step towards changing that."

In February 2018, retired businessman, volunteer and philanthropist ***Bob Cunningham*** announced a $1 million gift to the WeCareCMH Campaign. Bob has been a volunteer at the Hospital and Foundation for over 15 years and believes that "if everyone volunteered a little, and gave a little" that the very best in a community hospital will be there when we need it most.

Last November, a University of Waterloo alumnus who is a successful venture capitalist and part owner of the NBA's Golden State Warriors has donated $25 million towards Engineering 7, the University's newest building. The donation was made by ***Chamath Palihapitiya***, a 1999 Waterloo electrical engineering graduate and the founder and CEO of Social Capital, a Silicon Valley company that specializes in technology startups, providing seed funding, venture capital and private equity. "Waterloo Engineering provided me with a truly unique education," said Palihapitiya, who was an original member of Facebook's senior management team. "I can link my success in life to the skills and perspective I gained in my time at Waterloo. The next generation of thinkers, leaders and doers will come from Waterloo, and I am happy to help with this journey."

It's not surprising that ***Mike Lazaridis*** takes a very practical approach to his considerable philanthropic efforts. In our story in this edition about Lazaridis, he explains: "Our mission for Quantum Valley was to not only build state of the art Canadian labs, with world class researchers, that can develop new and transformative quantum technologies, but to also help establish and grow exciting new Canadian businesses that will take these technologies to global markets. Our success over the past 20 years, and our traction in the commercial markets in recent years, demonstrate that this is beginning to happen."

But he adds, "To me it's all about people. Attract and retain the most promising people and enable their success, and big things will happen."

In March 2019, CIBC pledged $200,000 over four years to Wilfrid Laurier University, providing outstanding learning opportunities for students in the university's Lazaridis School of Business & Economics. Half of the funds will support new scholarships for women studying finance. With the other portion, CIBC becomes title sponsor of the Lazaridis School of Business & Economics' innovative immersive learning vehicle, the Integrated Case Exercise. "CIBC is proud to support women in finance and help develop young talent," said ***Sam Alfieri***, district vice–president of CIBC. "We have a long-standing relationship with Wilfrid Laurier University and are happy to help support educational institutions and provide opportunities for career success."

In 2018, Wilmot township received a donation of $1,000,000 to be used towards trail development within the community. Lifelong resident, developer ***Mike Schout,*** presented Council with the first of two donations of $500,000 – the second donation coming in 2019. Schout explained, “My heritage is Dutch and I spent three weeks living with relatives in a small town in Holland in the early ‘90s while celebrating my aunt and uncle’s 50th anniversary. I was amazed at the trail system throughout the entire town and countryside and impressed by how many people were using them. They even had exclusive trail tunnels under major streets and train tracks.”

In April 2019, the University of Guelph received a $21 million donation to boost its business faculty. This, the largest single donation in the history of the University of Guelph, paves the way for new student scholarships and travel grants, academic chairs and expanded programming. The $21-million gift to the university comes from former Canadian football wide receiver and retired executive ***Stu Lang and his wife, Kim***, in honour of Lang’s late father, Gordon.

As part of their RBC Future Launch program, RBC is donating $60,000 over a three-year period to THEMUSEUM to support the Annual Alternative Conference. RBC Future launch is an initiative that invests in helping young people gain access and opportunity to the skills, job experience and career networks. “RBC Future Launch is our commitment of $500 million over the next 10 years to empower Canadian youth for the jobs of tomorrow. We are dedicating our knowledge, skills and resources to help young people access meaningful employment through work experience, skills development and networking,” said ***Massimo Iacurti***, RBC Regional Vice President, Kitchener Waterloo Perth.

Last October, KPMG announced renewed support for the accounting area at Wilfrid Laurier University’s Lazaridis School of Business & Economics, with a $250,000 donation. “Years before they choose their professions, our future leaders depend on the process of self-discovery and learning that academic programs like Laurier’s Lazaridis School provide,” said ***Mary Jo Fedy,*** managing partner, KPMG LLP Waterloo office. “That’s why KPMG Foundation supports undergraduate and graduate business programs. Our firm's contribution is just one way we can help inspire young people to develop to their full potential.”

The Graham Munro Charitable Foundation announced a donation of $500,000 to Wilfrid Laurier University’s Lazaridis School of Business and Economics. “The field of supply chain management is changing at a rapid pace and requires fresh talent, innovation and a competitive edge to keep the economy growing,” said ***Doug Munro***, president, Maritime-Ontario Freight Lines Limited. “Partnering with Laurier to provide students with the best education for career success is a win-win for everyone. We are excited to help students break into their professions with their best foot forward and invigorate industry with the sharpest and best-trained minds.”

For the third consecutive year, Kindred Credit Union donated $10,000 to the Canadian Foodgrains Bank to support efforts to end hunger around the world. “We very much appreciate the financial support provided to local growing projects for crop inputs. This allows volunteers to forward more dollars to help the hungry in food insecure locations,” says ***David Epp***, Ontario Regional Coordinator for the Foodgrains Bank.

THEMUSEUM is acquiring the neighbouring Bank of Montreal building at 2 King Street West, Kitchener. “We’re thrilled to announce this sole purchaser agreement with THEMUSEUM and be a part of this important campaign to help bolster the burgeoning arts and culture community of this growing region,” said ***Julie Barker-Merz***, Senior Vice President, South Western Ontario Division, BMO Bank of Montreal. “And to further assist, BMO has pledged a $1,000,000 donation to help transform downtown Kitchener’s cultural connection to the community and be a catalyst for renewal of arts and culture in the heart of the city.”

During a special event held in February, a culinary skills lab at Conestoga College was named in recognition of Flanagan Foodservice for its generous support of the recent expansion and re-development project at the John W. Tibbits campus in Waterloo. More recently, Flanagan provided a donation to support the expansion of the Waterloo campus. “The impact of this organization on our community and on our family is significant,” said ***Dan Flanagan***, Flanagan Foodservice CEO. “On behalf of our employees, and our family, we are grateful for the opportunity to be part of this transformative journey at Conestoga.” X


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STRONG START HAS STRONG FUTURE

Children's literacy program ready to scale up

BY PAUL KNOWLES

Machelle Denison,Executive Director

We've all heard the African proverb, "It takes a village to raise a child." Well, the Waterloo Region-based program Strong Start has quantified the concept – with Strong Start, it takes 2,872 volunteers, 380 charitable donors, and about 55 full- and part-time staff to start a child on his or her way to their best educational experience. Or, to be fair, thousands of children.

> "You can't measure the confidence boost or self-esteem that comes from working for 10 weeks with a caring adult. But we know that impact is huge. The children believe in themselves as a learner."

The program – officially "Strong Start to reading" – claims a simple but profound goal: "Making a difference in the life of a child." This is accomplished through several specific programs, but the underlying concept is, volunteers or paid staff members work with young school children and pre-school kids to help them learn to read – and in the process, to improve their self-esteem, confidence, and ability to function in the educational system.

Machelle Denison is Executive Director of Strong Start; she was the first full-time staff members with the organization, coming on board in 2010, nine years after Strong Start was launched as a community project. It was created through the shared vision of Lyle S. Hallman and Lynda Sylvester, both of whom have passed away.

Denison explains that Hallman wanted to create a program in which "volunteers help young children learn to read. This impacts their school life, life in general, and the community."

Retired elementary school principal Lynda Sylvester played a key role in creating and rolling out the program – it's now one of three Strong Start programs, today branded as "Letters, Sounds and Words". It started in one Kitchener school – today, the program is offered in over 280 schools, says Denison, through eight school boards in four Southwestern Ontario regions.

She adds that the program has helped over 3,900 children learn to read, the result of 45,000 hours of volunteer time.

Strong Start offers three programs under its umbrella – Letters, Sounds and Words; Get Ready for School; and Baby Connections. The first is offered to children in senior kindergarten and grade one, kids who need what Strong Start describes as "a literacy boost". The program is offered by trained volunteers who work with the children, one on one.

Get Ready for School is a program including 44 classes, offered by paid Strong Start staff members, for preschoolers in the six-month period prior to starting Junior Kindergarten. It is held in community centres throughout the region, and according to Jean Stacey, who is program coordinator for the Letters, Sounds and Words program, it is especially effective with children for whom English is a second language, and for children from lower-income homes.

Baby Connections is offered in collaboration with KidsAbility and other community organizations. The goal is to offer parents and caregivers coaching and literacy resources to use with their infants to support brain development and lay the groundwork for language and literacy development.

Strong Start programs were inspired by need, a need that continues to present itself: "quite a disparity in literacy levels" among children entering the educational system, according to Denison. She adds that, in the last school year, there were 45 different first languages represented in Waterloo Region schools.

This need for literacy help – and the attendant benefits of one on one relationships between children and trained adult volunteers – has meant that Strong Start is on what Denison calls "quite an ambitious growth trajectory."

The Strong Start team knows their programs are working. They know it through the stories told by the volunteers, the staff, the kids, the families, and the educators in the schools where the programs are held. But they are not content with anecdotal evidence.

Machelle Denison, left, and Jean Stacey

Stacey told Exchange that every child in the Letters, Sounds and Words program has a pre-assessment, to determine their literacy level; then they participate in the 10-week program, which sees them out of the classroom for one-on-one sessions with a volunteer; then there is a follow-up assessment.

And that's how they know, says Stacey, that "the gains are really significant." Their findings indicated "excellent or outstanding results" with an astonishing 95% of the children.

These assessment results are compiled by school, and presented in reports to the principals of each elementary school in which Strong Start operates.

But Stacey quickly points out that some of the most important results cannot be measured. “You can’t measure the confidence boost or self-esteem that comes from working for 10 weeks with a caring adult,” she says. “But we know that impact is huge. The children believe in themselves as a learner. That spreads over all areas of the curriculum.”

Denison adds that it doesn’t only spread over the curriculum – the results of Strong Start spread over the life of the child. She notes that, “a child’s vocabulary at age five is a predictor of their vocabulary at age 17. The early years are really important.”

Denison lists some other benefits of the programs, including preparing the pupils for acceptable classroom behaviour and relating to other children; and to ease the problems of “separation anxiety” for the pre-school children… and for their parents!

The Get Ready For School program is offered in neighbourhood community centres – while Strong Start provides everything except the physical space – and Denison says this is also a plus: “Because it is neighbourhood based, many of the children will end up going to school together, as friends.”

It has been discovered that young children who spend time in front of screens – computers, tablets, smart phones, and even television – struggle with literacy.

She adds, “the parents make friends, too,” as they bring their pre-schools to the neighbourhood centres.

One in four kids

The need is huge. Denison says, “One in four Canadian children struggles to learn to read.” There are governmentally-sponsored programs for a few of those kids, but many, she says, “do not qualify for other times of literacy support.” Strong Start will be there for an kindergarten or grade one pupil who needs the program.

Some of the challenges are obvious – the number of kids for whom English is a second language, for example. Other challenges are newer, and less well understood.

Denison says that experts “are noticing a shift in the developmental level” of young children, caused by “the introduction of technology at a very young age.” It has been discovered that young children who spend time in front of screens – computers, tablets, smart phones, and even television – struggle with literacy. Experts in the field are actually recommending that children under the age of two be given “no screen time”.

Stacey adds that too much screen time is proving to be a vocabulary deterrent, and Denison says, “Children are coming in [to school] who don’t know how to play.”

Both women immediately add, “There is no technology used in presenting the Strong Start programs.” Stacey adds, “the key components are based on games and activities. And the one-on-one attention the child receives from a caring adult.”

Stacey brings a personal perspective to Strong Start. “I’m also a volunteer in the program. I may be the only person all day who can take time to listen to the child.”

Funding and volunteers

It’s clear that volunteers are essential to the Strong Start programs, as is funding from donors. In addition to the almost 3,000 regular volunteers, say Denison, companies often offer a team of staff members to volunteer for a day or half a day, to work in the warehouse assembling kits for the programs, for example. Denison says this is all essential to “keep out costs down.”

She knows the costs right to the penny – asked about Strong Start’s annual budget, she smiles and answers very precisely: “$1,113,332.”

About 80% of their funding comes from foundations, led still by the Lyle S. Hallman Foundation. The rest comes from donations by companies, individuals, service clubs and through a few third-party fundraising events.

The program, which started in Waterloo Region, now reaches children in many parts of southwestern Ontario. Strong Start is now working with school boards including Thames Valley and Brant-Haldimand-Norfolk. A Strong Start caucus has been founded at Queen’s Park, hosted by Speaker of the House Ted Arnott. There are current 14 MPPs who have signed on “to help us make introductions to their communities.”

The Executive Director says that the 10-year goal for Strong Start is to be serving 100,000 children a year. She adds, “Every community in Ontario needs Strong Start.” x

Let's talk renting vs owning

The advantages of renting your home in retirement versus home ownership are compelling.

But often, people are hesitant to consider renting versus owning. They may say,

"My house is paid for – it costs me nothing to live here."

"My retirement income isn't high enough to pay for rent."

"I don't want to draw down my savings by paying rent."

Or, *"I want to leave the money in my house to my kids."*

Well, often, these kinds of concerns are based on incorrect assumptions, and a closer look shows that we do, in fact, have attractive options. Why is that?

Well, first, consider some key financial factors.

At a certain stage of life, owning your own home and paying down a mortgage was a form of "enforced" savings. And, of course, you and your family needed a place to live! For many Canadians, our home equity represents the majority of our savings. But in retirement, it can make more sense to rent, liberate the equity in your house, invest and use those savings differently.

Over the last 40 years the S&P/TSX (Cdn) Composite Total Return Index has averaged 9% annual returns. In 2016, Canadian stock markets delivered a 17% return, and in some years markets delivered a negative return, so this is an average, over time.

Over the last 40 years the S&P 500 (US) Index has averaged 12% annual returns.

In contrast, the financial return from home ownership in Canada over the last 30 years was 5.5%.

How much is that difference? Based on compounding your gains, it means that if you live in your house for the next twenty years, and the rates of return are the same as the last 30 years, a house worth $500,000 today will be worth $1.5 million, or a $1 million gain.

If you sold your home instead, and you invested that capital in the Canadian stock market, and left it there, your initial $500,000 will be worth $2.8 million in 20 years, or a gain of $2.3 million. Your simple annual average returns would be roughly $45,000. Assuming you draw a monthly income from retirement savings and investments. Bottom line – staying in our homes costs us a great deal in foregone investment income.

In comparing renting to owning, most of us also underestimate the all-in cost of home ownership. We don't realistically factor in property taxes, insurance, utilities, and maintenance. Even if your house is paid for, those costs of home ownership are significant.

For example, we discount the cost of maintenance. Many studies estimate an average cost of 2-3% of the value of our homes annually for maintenance; more detailed estimates for maintenance of a typical 2,000 sq. ft. Canadian home are $4500 to $10,000 per year. Of course, in real life these expenses don't get averaged out this way – more often, they come as unwelcome "surprises", like the roof that needs replacing, or the old furnace that quits.

Property taxes vary, but in many cities in Ontario an owner of a $500,000 home will pay between $5,500 to $7,000 per year in property tax.

Utilities can include gas, hydro, water, waste removal, furnace and water heater rentals, cable, Internet and security. Homeowners insurance also adds up. Total up your bills for the last year, and you may be surprised: for the average house these expenses are about $10,000 per year.

Taxes, insurance, utilities and maintenance are probably costing you an average of nearly $30,000 each year. If you sold your house and eliminated these costs, and also invested the proceeds from the sale, you'd potentially have more than $70,000 per year, which could be applied against rent, or added to your retirement income.

Of course, people have other, more personal concerns about selling their homes. Those may include,

"If I rent, and the landlord sells, my lease might be terminated, and I don't want to move somewhere where I could be forced to move again."

"I want to be able to entertain my family and friends. How can I do that if I move out of my house?"

"Rental accommodation isn't as nice."

"I want to be in a good area."

"I like belonging to a good community."

"I have hobbies and interests in my community, and I don't want to lose access to them".

Schlegel Villages shares these values. We offer well appointed independent living apartments where you can entertain as you please, enjoy free parking, live in active and beautiful neighbourhoods, and be part of vibrant communities. And best of all, unlike living in your own home, if your needs change over time, you can remain in your own apartment, while having access to additional support as and if you may need it.

Beyond the financial logic, our independent living apartments make the option of renting extremely attractive for many people.

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[1] Canadian Institute of Actuaries
[2] In Canadian dollars
[3] Canadian Real Estate Association
[4] Before taxes

In addition to other lifestyle benefits of renting Independent Living Apartments at Schlegel Villages, there can be significant financial benefits

- ✓ Ability to unlock the value of your current home
- ✓ Long-term predictable rental costs
- ✓ No unpredictable maintenance costs – they are all included in rent
- ✓ No more utility bills
- ✓ Many included services and benefits: for example; linen service, housekeeping, recreation or club memberships, storage locker
- ✓ Flexibility – freedom to end your lease on 30-days notice
- ✓ And easy access to additional optional services as you may need them

Use our cost comparison tool at **schlegelvillages.com** to help you decide if renting an Independent Living Apartment is right for you.

Tips

- You'll need your utility bills for the last year handy
- When considering your home repairs and maintenance costs, consider what they have averaged over the last several years, and any significant expenses coming up (any home modifications required in order to live more comfortable at home?)
- Have your banking and financial statements at hand
- Fill in the spreadsheet, and then discuss with your own financial advisors

The Village of ARBOUR TRAILS

115 Cherry Blossom Circle, Guelph

schlegelvillages.com