

Smith

SPRING 2023

BUILDING WAYS TO BE THERE

How Eric Windeler turned tragedy into a mental health movement for youth

Why Climb a Mountain?

Taking on one of mountaineering's biggest challenges: the seven summits

Profit and Purpose

Professor Wenjue Knutsen on the rise of social impact investing

Big Data Decade

Ten experts from 10 years of Smith analytics programs





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FSC



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DEAN'S MESSAGE

A global perspective

ONE OF THE WAYS that we at Smith can prepare our students for the evolving business world is to help them develop an impact mindset. As future leaders in global organizations, this mindset will help them change the world.

Learning to adapt to different cultures and contexts is an essential part of business education and an impact mindset. To help our students build this global perspective, we have deliberately integrated international opportunities across Smith's programs. From a traditional semester abroad, to one-week study tours, to a year abroad as part of a double-degree program, there are lots of options for students.

An important part of our global perspective is to collaborate with the best schools around the world. Our approach involves adding partner schools in emerging markets. This past year, we formalized several strategic academic partnerships in the Global South. They are:

- The Costa Rica Institute of Technology (TEC), marking our first partnership in the country;
- Instituto Tecnológico Autónomo de México (ITAM) in Mexico City; and,
- Our first partner school in Morocco with Mohammed VI Polytechnic University (UM6P). Smith's other partner schools in Africa include Lagos Business School (Nigeria) and Stellenbosch (South Africa).

The future will be profoundly shaped by what happens south of the equator. Business schools need greater investment and collaboration with Africa, South America and Southeast Asia.

This term, 378 Smith students are on exchange, studying at 79 partner schools in 28 countries. We are also hosting our largest winter term intake of 222 exchange students from 51 partners.

We are also bringing the world to Smith with two international delegations:

• Business analytics graduate students from ESADE business school in Spain came to SmithToronto for a week-long study tour in April. The trip combined in-class academic sessions with Smith faculty, corporate visits with Smith partners and cultural experiences.

• In August, we are hosting a delegation of executive students from Lagos Business School. We're excited to explore future collaborations.

Global partnerships extend beyond exchange. We are proud to be the first North American school to join the **Council on Business and Society (CoBS)**, a global alliance of business schools dedicated to promoting responsible leadership, research and education. Deepening our collaboration with this influential group of global business schools will help us integrate more aspects of ESG and social impact into our teaching, as we all work to find solutions to the world's most pressing issues. The CoBS relationship will include opportunities to highlight Smith faculty research on global platforms and create learning opportunities for students.

Closer to home, our thought leadership platform, Smith Business Insight, is celebrating 10 years since its inception. In its first decade, Smith Business Insight has created more than 800 articles, webinars, podcasts, videos and papers. Please check it out and subscribe at smithqueens.com/insight.

Wanda M. Costen, PhD
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ONE MORE THING...

I'm proud of Smith's Full-time MBA program, which does an amazing job coming together each year to celebrate the diverse cultural backgrounds of our students and promote intercultural awareness. The annual Culture Night features food, music, dress and dance from around the world. This year's event, in March, had representation from 14 countries. A nice touch: organizers included recent MBA grads who missed the festivities during pandemic restrictions.

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O Canada

ZHI YU YEO, Comm'24, found this piece of Canada-shaped ice while exploring Athabasca Glacier in Alberta during his fall exchange at Smith. The snap even earned the National University of Singapore student first place in the Centre for International Management's semi-annual photo contest





Dean Wanda Costen and Mike Murray, BCom'96, co-founder and managing partner at Peloton Capital Management

Walking the talk

Over the last few years, Smith has committed to doing its part to address systemic racism and inequities that remain deeply rooted in our society.

As with any meaningful change, intent must be followed by action. So, in November, Smith took another step forward in its efforts toward progress with the launch of a \$4-million matching campaign in support of equity, diversity, inclusion and Indigenization (EDII) initiatives at the school.

Smith will match dollar-for-dollar donations made to the school's EDII Fund. Initiatives supported by the fund include reducing extra-curricular financial barriers for students with financial need, scholarships for marginalized groups and the

creation of welcoming and inclusive physical learning environments at Goodes Hall and SmithToronto.

It was an initiative led by aspiring artist/designer and Commerce student **KEIRAN RIOUX, Comm'23**, to make the team rooms at Goodes Hall more inclusive that caught the attention of the team at Peloton Capital Management. "We appreciated the mental health benefits of having more bright and welcoming meeting spaces at the school," says **MIKE MURRAY, BCom'96**, co-founder and managing partner at the firm. "We have a passion at Peloton for mental health initiatives and we thought this was a good fit."

Jessica Duggan, interim executive director of development and alumni engagement at Smith, is hopeful the launch of the matching campaign will inspire similar contributions to the EDII

Fund and signal to the Smith community that the business school is serious about investing in positive change.

Alumni and friends of Smith can increase the impact of their gifts by visiting smithqueens.com/invest.

New assistant deans named

Three faculty have taken on newly created assistant dean roles. In March, **BARRY CROSS, MBA'96**, became assistant dean of professional graduate programs (PGP). He's working with **WEI WANG, PhD'06**, associate dean, PGP, on program development and growth.

Cross, who is a Distinguished Faculty Fellow of

Operations Strategy, came to Smith in 2006. Before that, he spent 18 years in the automotive and manufacturing sectors. He has developed courses and taught across eight Smith programs. He speaks and consults widely on innovation, execution and operations strategy.

In January, **CHRISTINE COULTER, Artsci'98, MIR'14**, and **KATE ROWBOTHAM, MSc'01, Artsci'97**, took on new school-wide positions.

Coulter, a Distinguished Faculty Fellow of Organizational Behaviour, is now assistant dean, academic. She'll oversee academic operations and regulations and manage the academic integrity portfolio.

Coulter joined Smith in 2001 after completing her master's degree in political science at Western University. She teaches human resources, human capital management and industrial relations in the Commerce and MBA programs. She formerly chaired the Academic Appeals Committee and has held administrative roles at Smith, including director of operations for the Commerce program.

As part of her responsibilities, Rowbotham will chair the Undergraduate Curriculum Committee, oversee experiential learning and outcomes and support initiatives to enrich the classroom experience in her role as assistant dean, teaching and learning.

A Distinguished Faculty Fellow of Organizational Behaviour, Rowbotham returned to Smith in 2009 after completing her PhD at the University of Toronto. She has developed and taught courses in human resources, negotiations and diversity and inclusion and won awards for teaching and course design. She

has previously volunteered (including service as chair) on Smith's Undergraduate Curriculum Committee and the Academic Integrity Panel.

This is business now

Should companies do more to make the world a better place? A recent survey for Smith School of Business says yes. Fifty-two per cent of Canadian adults agree that businesses need to do more than they do now to solve societal problems and help people. Close to one-third strongly agree that CEOs should take a firm position on important social issues.

Why the high expectations? **JACOB BROWER**, Distinguished Faculty Fellow of Marketing, says that "corporations are the most powerful

entities on earth," so people want more from them. "They see businesses as having the agility and speed to actually do something, and potentially that they hold some responsibility for some of the social ills that they see," he adds.

Business leadership can be a lonely place and facing the complex balancing act of creating social impact while delivering profit to shareholders can seem daunting. So Smith spoke with 15 business leaders, including **ALVIN HEW, BCom'86; CONNIE LO, BCom'15, GDA'15; COLIN LYNCH, BCom'07, Artsci'07; MOUNIR NASRI, MMIE'20, Artsci'19; MEGHAN ROACH, BCom'05; and HAKEEM SUBAIR, MMIE'17**, who offered their take on how to navigate our changing world.

Hear what they had to say, watch interview clips with leaders, and access survey highlights, a

discussion guide for leadership teams and more at smithqueens.com/now.

Smith MBA makes top 75

In February, Smith's Full-time MBA was recognized among the top 75 programs in the world by the *Financial Times*. The program moved up an impressive 28 spots from 2022, to 71 in the 2023 ranking of the world's best MBA programs.

But this isn't the only stat that gets Full-time MBA director **MATT REESOR** excited. It's the program's position as No. 1 in Canada for overall satisfaction with the program. Smith alumni three years post-graduation have ranked Smith's MBA in this position three years running.

"Knowing that three years later our graduates continue

to look back on their experience in the program with pride is the most meaningful measure of success," Reesor says. "A great MBA experience goes beyond the classroom. That's why we continue to work diligently to offer a highly personalized approach that allows students to build the right program to help them reach their individual career goals."

Career coaching, personal development and networking play an important role in helping students achieve their post-MBA goals. Smith was ranked highly in these areas as well. It was first in Canada for its career services and alumni network, and 25th and 44th in the world in each category.

"We don't want to rest on our laurels," Reesor says. "Staying on top of what organizations need today means that the education we provide must continue to evolve." ■



Maple Madness

The life of Smith MBA students is busy, but they still manage to have some fun! Like when the Full-time MBA class of 2024 got to experience one of Kingston's annual March traditions. The group bundled up for a trek back to the sugar bush at Little Cataraqui Creek Conservation Area for Maple Madness, where they learned about the history of maple syrup production and enjoyed some sweet treats: maple syrup, pancakes and fresh snow. What better way to celebrate the season.

FACULTY

End of an era

As he heads to retirement, longtime professor Ken Wong talks about his career in the classroom

BY KRISTEN SEARS



KEN WONG, BCom'75, MBA'76, first walked through the doors of the business school at Queen's University in 1971. He never left. Well, almost. Save for a handful of years working at the Conference Board of Canada and studying at Harvard, Wong has been a fixture at Smith.

Of the 45 years he's spent here, 40 have been as a professor of marketing. Sure, he's had plenty of chances to go elsewhere, but Wong has always been interested in more than just a cool job.

"The qualities that kept me here are the same ones that brought me back as a faculty member in 1983," he explains. "I saw then, and continue to see now, an organization with the capacity and desire to be more than it is today and

equipped with alumni, faculty and students dedicated to making it happen... Here, I was part of a movement."

Wong was there to see the business world take notice of the "plucky B-school," as he calls it, ready to assert itself on the global stage. And he had a hand in launching the first MBA program in Canada to operate completely without a government subsidy.

Now, after teaching thousands of students, Wong is retiring. He taught his last MBA and Commerce classes in the fall and delivered a final lecture at Goodes Hall in March. So, what's next? What's his proudest accomplishment? What will he take with him into his next chapter? We caught up with the marketing legend to find out.

You've been a favourite teacher of many. As a student, who was your favourite professor?

I truly learned my craft at the feet of some masters, and Smith has had a multitude of masters: **CARL LAWRENCE** introduced me to marketing as a way of thinking; **BO PAZDERKA, PhD'76**, showed me that economics was a way to understand human behaviour; **MERV DAUB, BCom'66**, was the renaissance man who encouraged us to develop a philosophy about the role of business in society; **BILL CANNON** demonstrated the highest level of commitment to his students; and **PETER RICHARDSON** was the ultimate practitioner of continuous innovation.

I could add a dozen more, including

some whose classes I never got to take but who influenced me by their example. And I've had amazing deans, who taught me the importance of creating opportunities for others to excel. You see, Smith will never be just one person. That's what makes this place special.

If you were to go back in time and pick a different career, what would it be?

I love athletics and so sports would be one. I love the arts and so that would be another. And I love generating revenue and making money, so business would also qualify. But I would like to think I could be happy in any career where I felt I could make a difference in people's lives. So, at the risk of sounding holier than thou, the best part of success isn't what it does for you but what it enables you to do for others.

What is something you hope your students have learned and taken with them into their careers?

The importance of leadership and teamwork. Most people associate B-school with technical skills like research and valuation. While those skills are important, they can be acquired anywhere, including over the Internet. So, I hope my students go beyond the theory of business to master the practice of business. You cannot do that without learning to lead, motivate and develop your people. People don't go the extra mile out of duty as much as they do out of loyalty.

What is something your students taught you that you'll take into your next chapter?

The students I sense are personally happiest and professionally the most successful approach each day, albeit possibly unconsciously, with a growth mindset. I used to think it was merely the naïve optimism and energy of youth, but I now see it is a deliberate choice. They choose to see opportunity instead of challenge.

In this sense, they have taught me that retirement is not the end of a career but rather the next chapter... and a chapter to be seen as a new beginning with all the optimism of youth. I may not know what the future holds, but I am excited to find out.

What's on your bucket list in retirement?

I have always tried to do whatever struck me as worth doing in the moment. As a result, there are no milestone activities or achievements on my bucket list. But career demands often had me on the road and away from family and community, so I plan to spend more time doing things dedicated—exclusively—to that. And my golf game.

What's your proudest accomplishment?

Personally, it is my family. Because we remain tight and committed to each other. Professionally, I have been absolutely blown away by the outpouring of best wishes on my retirement. They have validated my professional choices and, at their best, suggest that in some small way I made a difference in their lives. It doesn't get any better than that. ■

MILESTONES

TEN YEARS OF INSIGHT

Smith celebrates a decade delivering ideas with impact

What traits make leaders great? How can office teams be super-effective? These are vexing questions. Yet answers exist. If you look deep, you'll find them in the research papers of business school professors.

But few of us have time to dig through academic journals. Luckily, some places do the work for you, turning research into articles with practical takeaways. One is Smith Business Insight. Since it launched 10 years ago, Insight (smithqueens.com/insight) has produced more than 800 articles, webinars, podcast episodes, papers, videos and more that feature the evidence-based expertise of Smith and Queen's faculty and graduate students.

"There is so much business research that has implications for companies and employees and can be very useful for leaders to understand," says Smith marketing professor **JAY HANDELMAN, PhD '96**.

Handelman was associate dean of research when he helped launch Smith Business Insight in March 2013. As he recalls, valuable research was being done at Smith but didn't usually make it to the corporate world. By contrast, research in other fields was often featured in the popular press. A good example is medical studies with the latest health information.

Handelman thought business research deserved a larger audience. And so Smith Business Insight was born. Today, it features experts on many topics—from leadership and marketing, to finance, accounting, analytics, entrepreneurship, business strategy and social impact. There's a monthly newsletter, too.

The pandemic highlighted the value of business research when, during the first lockdown, firms grappled with the ups and downs of employees working from home. Fortunately, Smith faculty have bench strength in remote teamwork and, through Insight, provide practical advice for managers. More recently, Insight has tapped the expertise of Smith professors on workplace trends such as the four-day workweek and quiet quitting.

Looking back, Handelman recalls some concern as to whether Smith's faculty was producing enough research to warrant a website that would publish weekly. "But that was never a question for me," he says. "I was blown away by how much research was done at the school here. We have so much knowledge in so many areas that we can share." ■



Show time

Alex Hook, Comm'23, is already acting on her career ambitions

BY KRISTEN SEARS

IN DECEMBER, WHILE HER CLASSMATES were prepping for exams with study sessions in Goodes Hall and late-night chapter reviews in Stauffer Library, **ALEX HOOK** was cramming in between wardrobe and hair and makeup.

She was in Toronto on the set of the new Hallmark Channel series, *The Way Home*. Hook stars in the multi-generational family drama alongside series leads Andie MacDowell (*Groundhog Day*, *Four Weddings and a Funeral*), Chyler Leigh (*Grey's Anatomy*, *Supergirl*), and newcomer Sadie Laflamme-Snow.

"There were definitely moments where I spread myself too thin," says Hook. Filming of the 10-episode run took place between late August and December. Or, for Hook, fall term of her fourth and final year of Commerce. She went back and forth between Toronto and Kingston and spent three days filming each week. She even wrote an online midterm and exam from the set.

Hook, who plays the younger version of Leigh's character, Kat Landry, in the time-travel family drama, is no stranger to film and television. She's been acting on screen since she was seven. She was also the lead of the popular Nickelodeon teen drama *I Am Frankie*, which ran for two seasons in 2017 and 2018.

"My parents pretty much put me into everything to try things out, to see what I liked and what stuck. I started in theatre and loved the idea of becoming someone else, but I didn't quite enjoy the theatrical aspect of the stage," she recalls. She knew early on that she wanted to pursue an acting career in TV and film.

So why business school? A career in acting comes with a lot of uncertainty. As Hook says, "It's not a job until you book something." She considered a degree in film but wanted an education that would complement her acting skills and could serve as a plan B if she ever needed it.

"Combining business with acting just made sense should I need to read a contract or negotiate on my behalf. Even just creating a brand for myself needs some sort of business acumen," she says.

As the end credits near on her time in Commerce, Hook also says the resilience she honed in the program will serve her well as she looks to her future in the acting industry. A future that might just include another stint on *The Way Home*. A second season was announced in March. ■



TRADITIONS

Feeling like you belong

An annual rite of passage for Commerce students gets an update



SMITH COMMERCE ORIENTATION Week may be steeped in a century of tradition, but it's staying in step with the times. Last fall, organizers made several changes to the program to ensure that when the welcome is rolled out ... everyone feels truly welcome.

"What's most important to the team is making sure every student feels they have a place where they belong and a community they are part of," says **BROOKLYN WINTER, Comm'24**, last year's chair of the Commerce Executive on Orientation (CEO). "Transitioning into the first year of the program is scary and Orientation Week plays a huge role in providing a safe, welcoming environment and setting students up for success for their time at Smith."

The revamp was part of Smith's broader shift to a more inclusive and equitable environment, and saw the in-person implementation of changes resulting from the Smith Commerce Orientation Transformation Project, led by **MARLA MACINNIS, Comm'23**, a past chair of CEO. "The transition to an in-person Orientation Week for the first time in two years was a great opportunity to introduce these changes because it was kind of a fresh start," Winter says.

Some of the key changes included a reduced orientation package fee and bursary program to help remove financial barriers to Orientation Week participation; new uniform options; the end to the socio-economic theme of "love" and of "money" in favour of

the four suits of cards; a briefing and training for leaders on the realities of international students' experiences and how to offer support; and a mix of high and low-intensity activities.

One change that was a particular hit was "CommChill," which invited students to Goodes Hall for an evening to play video games, watch movies and engage in other activities. "The idea was it would be low intensity, but we also wanted to make sure students weren't in their dorm rooms feeling lonely," Winter says.

As Winter passes the CEO baton to **SAGAANA SIVATHASON, Comm'25**, she says, "There are still areas that can be improved, and I'm excited to see the direction that Sagaana takes." ■

GLOBAL

CONNECTING WITH THE GLOBAL SOUTH

Smith adds new international partner school in Morocco

OVER THE LAST DECADE, Africa has become one of the world's fastest growing economies. By 2030, the continent will be home to nearly 1.7 billion increasingly affluent people. Consumer and business spending is expected to hit US\$6.7 trillion, according to the Brookings Institution. Companies will no doubt look to Africa for opportunities. It makes sense that business schools pay attention, too.

As an example, Smith now has three international partner

schools in Africa. The latest is Mohammed VI Polytechnic University (UM6P) in Morocco. Each year, two Commerce students can spend a semester at the university. Meanwhile, two students from UM6P will be welcomed to Smith and attend classes in Goodes Hall.

The partnership is Smith's first with a school not solely focused on business. At UM6P, Commerce students can study international relations, law and public policy and take electives through the Faculty of Governance, Economics and Social Sciences. Smith's other African partners are Lagos Business School in Nigeria and Stellenbosch Business School in South Africa.

Dean Wanda Costen says such partnerships demonstrate Smith's commitment to the Global South. "The future will be profoundly shaped by what happens south of the equator. Business schools need greater investment and collaboration with Africa, South America and Southeast Asia." ■



Insight

FACULTY RESEARCH • IDEAS • ALUMNI EXPERTS • ADVICE

SOUNDS OF THE CEO

Executives say a lot on corporate earnings calls. But how they say it can reveal much more

BY JORDAN WHITEHOUSE

A FEW YEARS AGO, BLAKE STEENHOVEN was preparing for a presentation at a company that was, as he puts it, “pretty straightlaced.” He still remembers the words of wisdom he was given by his superiors before stepping into the spotlight: “Don’t be so expressive,” “tone it down,” “be professional.”

Steenhoven’s interpretation: “boring.” He knew this was the standard advice across the corporate world, but it didn’t seem right for the message he had to deliver. “I felt intuitively that this was bad advice, or at least not universally applicable. But I was also thinking about why: Why was this bad advice? Is there actual evidence?”

It turns out there is, and now Steenhoven is helping provide it. The assistant professor of accounting at Smith is part of a new wave of researchers looking not just at what is said in financial communications, but how it’s said. Using sophisticated acoustic analysis software and machine-learning tools, these researchers are finding that the voice features of executives, like pitch and volume, can signal a lot—including a company’s actual financial health.

One of the more fascinating types of communications Steenhoven looks at is the corporate earnings call. Anyone who has listened in on one of these quarterly disclosures of a company’s performance knows just how tightly scripted they can be. On one end are

the executives, carefully watching every word, discreetly dabbing every bead of sweat. On the other end are investors looking for any sign of the real truth, anything that will give them an edge.

They won't get that edge by trading on standard information like revenue growth anymore, says Steenhoven. "So now you see almost an arms race to find the new source of data that only you have access to. And that's where you see a lot of analysts trying to extract what they've determined to be a very useful signal—these non-verbal behaviours, and specifically vocal cues."

LISTEN CAREFULLY

Some of the evidence those analysts rely on comes from the work of researchers like Steenhoven, who have shown in recent years just how impactful vocal cues can be. One study, for instance, found that when managers sounded excited on earnings calls, the stock market responded favourably.

Another found that stock prices increased when managers lowered their pitch during the Q&A portion of earnings calls.

In one of Steenhoven's early experiments, he showed that vocal cues can change depending on the CEO's goals. Recruiting MBA students to act as CEOs of a beer company, he had them use scripts to either persuade prospective investors to invest in the company or current investors to hold their position. Steenhoven found that the CEOs increased their vocal pitch, pitch variation, volume, volume variation and speech rate when trying to get investments. They lowered their pitch and pitch variation when trying to hold on to investments.

Steenhoven says one of the big takeaways from this study is for investors to listen carefully for the true goals of executives. For executives, the big lesson is to know what your voice can reveal about your goals.

He is quick to point out, however, that whether you are an investor or an executive, you have to be careful about interpreting what, exactly, a particular vocal cue means. "Our voices are such a mix of all sorts of different motives, and so trying to find a particular measure that means this thing—and only this thing—is really, really fraught."

COACHING A VOICE

Steenhoven also says that companies have to be careful about vocal coaching. As he experienced before his own presentation, as well as with surveys he conducted with investor relations officers, companies now teach executives how to precisely present their messages. But some may not realize there can be unintended consequences.

In a 2021 study Steenhoven did with Kristina Rennekamp and Brian White (both at Cornell University), participants were asked to listen in to the mock earnings calls of more MBA-students-turned-fake-CEOs. Not surprisingly, the researchers found that the CEOs who were coached to sound less emotional were indeed judged as sounding less emotional than the uncoached. But the coached CEOs also sounded less natural to listeners, which in turn made them think the CEOs were less competent and trustworthy.

"This really is a lesson to think about communication a lot more holistically," says Steenhoven. "You have to be cognizant that by achieving one goal—reducing the emotion in your voice, for example—you might have the unintended consequence of being less effective at another goal, like just communicating effectively."

Next, Steenhoven will likely study empathy, particularly how it gets communicated during presentations like earnings calls. In interviews with investor relations officers, he discovered that many try to get their CEOs to express empathy in certain situations. No doubt part of this is in response to the perception that executives need to sound empathetic during these uncertain economic times. But can it be done effectively? And are there conditions where it isn't advisable to sound empathetic? These are the questions Steenhoven may target soon.

Yet whether he looks at empathy or some other communication goal, Steenhoven says they all broadly point back to the fact that non-verbal communication matters. "It's just one of the realities of communicating with investors in this day and age. It's no longer just about the numbers or the words. It's the non-verbals that colour all of it." ■



ASK AN EXPERT

Can service be too friendly?

Anyone who's worked in customer service knows the maxim "service with a smile." People indeed appreciate doing business with a genuine friendly face. But can firms overdo it? Can they be too friendly? Worse, can über-friendliness be a turn-off?

LAURENCE ASHWORTH, professor of marketing at Smith, says yes. Ashworth has done several studies with colleagues (including Smith assistant professor **NICOLE ROBITAILLE** and **SUZANNE RATH, PhD'19**) on friendly service. For example, they tested two customer sales encounters: one with a very friendly salesperson and the other with a polite, but not overly friendly, salesperson. The result: people were less likely to want to stay in the store with the very friendly salesperson.

So what's wrong with a big mug of conviviality? It all comes down to how friendships develop, Ashworth says. "If you think about your own interpersonal relationships, you act very differently at the early stages of a friendship than you do at the latter stages."

By being overly friendly, employees are trying to treat customers like old friends, when they are not. And that makes people uncomfortable. The lesson, Ashworth says: "Friendliness works in friendships. Friendliness does not necessarily work when you are trying to create a friendship."

So if not glad-handing, what should firms do to please customers? One tip: "Focus your frontline employees on making things easy for your customers," Ashworth says. "Don't worry about becoming their friends. Instead, become their personal assistant."



Can investing drive social impact?

Professor Wenjue Knutsen explains what happens when private capital does public good. And expects a return

BY DEBORAH AARTS, Artsci'04

WHAT ROLE CAN PRIVATE INVESTMENT play in addressing social problems? Should it be involved at all? They're questions Wenjue Knutsen thinks about a lot. As an associate professor who studies non-profits and social enterprises for both Smith and the School of Policy Studies at Queen's, she's noticed growing interest in "social impact investing"—directing private capital to public good, with the expectation of returns. In conversation with contributor Deborah Aarts, Knutsen explains how social impact investing works and why its promise of a "blended return" is gaining currency.

Deborah Aarts: What exactly is social impact investing and how does it work?

WENJUE KNUTSEN: Essentially, it is financing that provides funds or investments to social enterprises, which is a big umbrella term that refers to organizations that simultaneously pursue business and social impact activities. Some of these are non-profits that require income to achieve financial sustainability and independence; others are for-profit businesses that generate revenue from products or services that further a social mission, such as a company that sells organic fertilizer. What unites them is their focus on a double bottom line: the nature and extent of the investor's returns often depends, at least in part, on the recipient organization's ability to deliver on its social mandate.



What does this look like when put into practice?

Social impact investments can be led by pretty much any investment institution, from fund managers to financial institutions to family offices. A good example that comes to mind is in Brazil. In 2009, a group of socially-minded young entrepreneurs there started an organization called Vox Capital, with the promise of a “blended return.” They raised money for the fund from banks, private investors and families with similar values. They then made a series of 20 investments in startup social enterprises working to fundamentally change people’s lives through improving such things as health care, housing and education.

What makes this different from typical ethical investing funds can be seen through the nature of the returns. For example, a significant proportion of the fee that Vox draws is dependent on whether investees have reached measurable targets related to social impact. This shows social impact investing’s commitment to social causes. In comparison, the primary objective of ethical investing or socially responsible investing is still financial returns.

This sort of funding clearly fills a gap, but what’s really in it for investors?

It can be helpful to think of it in financial terms, but in a different way than you might think. Say you’re financially secure, with an annual budget set aside for doing good in the world. If you make a donation, that money is gone for you, aside from a small amount you’ll get back on your tax return; it’s a one-time, one-way transaction. But if, instead, you divert that money into a social impact investment fund that supports organizations doing social good, you stand to not only keep your principal but, hopefully, to make a return on it. Your money can therefore also be recycled and used repeatedly. You can help one group of people now and another in the future, and so on.

What is a reasonable return for investors working in the social impact space?

Research in the social impact investing space is still limited, so we don’t have aggregated data, but we can point

to individual cases. For example, with Vox Capital in Brazil: a few years into operations, their goal for returns was the rate of inflation plus six per cent. They also suggested that, perhaps, a return of four per cent would be too low, but 20 per cent would be too high. It depends on what kind of organizations the investment is supporting. And, as with all investments, there’s a chance that the financial return will be zero.

Do you see interest in social impact investing growing?

Yes. Late last year, the Global Impact Investing Network estimated the size of the worldwide impact investing market to be US\$1.164 trillion, the first time that figure has topped the US\$1 trillion mark. It’s still not fully mainstream yet, but it’s playing a bigger role in our economy.

Why do you think that is?

There are several reasons, but three main ones come to mind. First, lots of people say our society’s going downwards. But I think our business world is definitely going upwards, at least in terms of developing conscientiousness related to social impact. You can’t find a big-name company that does not have a corporate social responsibility practice. That’s a big change.

Second, we’re moving to a place where blended values—mixing profit and social good—are becoming more and more common. People are looking for meaning in their life and in their work. Third, our society has a lot of unfulfilled gaps related to social issues. People are aging and we have higher demands related to our quality of life. That’s when social impact investing can try to take off some of the pressure.

You’ve also looked at social impact bonds (SIBs), in which investors fund agencies and non-profits to provide social services on behalf of governments. At first glance, this seems to be privatizing what should be a public responsibility. Is it really?

No, I don’t think so. SIBs are complicated, but I think of them as a way for investor groups to fund a pilot project for the government. These tend

to be intervention or preventative services, like initiatives meant to prevent people from committing crimes or entering the foster-care system.

The investor group can fund a project, and if the agency providing services hits an established target—say, 22 out of 30-ish at-risk children in a preventative program stay with their mothers, as was the case with the Sweet Dreams initiative in Saskatchewan, the first SIB in Canada—the government will reimburse basically all the money that the private investor put forward, plus, usually, a percentage return. But if they don’t hit the target, that means the project doesn’t work—the pilot failed. The investor may be out of their money, but the government is not. In fact, it has just saved a lot more money by not implementing a program that doesn’t work broadly.

Let’s pretend I’m a hard-nosed Milton Friedman devotee who believes the only purpose of business is to make money. Why should I care about social impact investing?

Here’s what I’d say: What’s the purpose of your life? What’s the purpose of your business? Is it really just about wanting more money? Isn’t that getting boring? A lot of people get into social impact investing because they’re looking for meaning. And there are lots of ways you can make a social impact without you lifting a finger. All you need to do is put the money with somebody who will do the work for you.

Think about what you care about most in this world. Think of the social impact your investments could make towards that. You may be able to do a lot more with social impact investing than with traditional philanthropy. So I’d say: think cautiously, think carefully, but really think about it. ■

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Computer error

Many non-profit agencies lack proper systems for the digital age. Charles Buchanan, MBA'92, has ideas to change that

BY ANDREA YU

IT WAS IN EARLY JANUARY 2016 WHEN CHARLES BUCHANAN first got a glimpse into the state of IT networks and services in the non-profit sector. At the time, Buchanan was the board chair of a large agency serving newcomers to Calgary, and the board was doing an organizational review of the agency. That included a look at its technological capabilities.

Buchanan, then an executive vice-president of sales and marketing at a fintech company, was not impressed by what he saw. “It was abysmal. It was just thrown together over the years. It was not planned. It was not supported. It was not safe. It was not efficient and not effective.”

Digging deeper, Buchanan learned that different agency departments had separately purchased the same software to manage client relationships. A year prior, they began paying thousands of dollars a month for a subscription to a case management tool that was never implemented. The agency was “getting taken advantage of,” Buchanan says.

Worse still, the agency had contracted a local IT management company to handle its technology services, paying close to \$10,000 a month. For that, the company only sent a part-time employee to visit the office twice a week. In addition, Buchanan saw that the agency wasn’t seeing the full potential of its data. “They did not do any meaningful analysis with their data to make predictions or show how they were doing.” This impacted the agency’s ability to receive funding and donations.

Digital divide

Pick a charity, any charity, and you’re likely to find a vastly under-resourced setup. That’s to be expected. Non-profits rely on donors who want their dollars to go directly to benefit the causes the charity pledges to support. That often means fewer employees and less than luxurious offices. Unfortunately, it can also mean a dismal jumble of technology. A 2021 CanadaHelps survey of 1,400 charities found that most believe digital adoption is important but 55 per cent say they either lack the funding or skills to do it.

The same survey found that 58 per cent of charities with less than \$100,000 in annual revenue (that’s 50 per cent of all charities) have no plans to put digital into their everyday operations. In analogue times, that might have been OK. But no business can operate effectively today without proper tech. So how can non-profits function without?

That’s a question Buchanan asked after he visited the Calgary agency. Having spoken with board members at other non-profits, he had learned that poor technology systems

“We have to start seeing these organizations differently. We have to believe we’re investing in competent management and people”

— Charles Buchanan



at the newcomer agency were common among non-profits. “We saw one organization that had a washer, a dryer and a server all in the same room,” he says. These discoveries prompted Buchanan to start volunteering with charities as a technology adviser. But the need was overwhelming and he wanted to do more.

So, in April 2016, he quit his fintech VP job and launched Technology Helps. It’s a social enterprise that provides cybersecurity and support for social-good organizations such as charities, non-profits, co-ops, social enterprises and underrepresented groups. He quickly landed his first client and, today, Technology Helps has a team of 20 that has assisted over 200 agencies with IT support—allowing them to better serve clients, save money and generate compelling reports for donors.

“Someone starting their first job in non-profits said that our technology setup was way better than they had at their corporate job,” Buchanan notes. But he believes that non-profits with superior computer systems and support should be the standard, not the exception. “These organizations are on the frontlines doing hard, important work,” he says. “They deserve to have great services. These are the organizations that are keeping us safe. They’re educating kids. They’re helping vulnerable people.”

Finding a fix

So what needs to happen to equip more non-profits with the right digital-age technology? One change Buchanan wants to see: longer-term funding for non-profits. A lot of funding cycles are for one year, he explains. “That means agencies live year-to-year, applying to foundations to get funding and continue doing their work. They don’t know if they

can serve their community in the same way if their funding gets cut,” he says. That makes it difficult for non-profits to plan, including for investments in technology.

Buchanan also advocates for a shift in the culture of how donors want their funds used. “When you donate to a charity, you want 100 per cent of that to go to what you call ‘the cause,’” he says. “You don’t want any of that to go to infrastructure and administration, which technology is a part of.” Buchanan wants funders and donors to view themselves as investors instead. “We have to start seeing these organizations differently,” he says. “We have to believe that we’re investing in management and competent people who are doing things for the benefit of the community.”

Another important point: better technology doesn’t just help non-profits; it helps their clients. When charities don’t have proper systems, their clients suffer. For example, language classes for immigrants: to get into such classes, newcomers are advised to register with multiple agencies to improve their chances of getting in. But, says Buchanan, agencies don’t often coordinate with one another. “Being in a new country, not speaking the language, and having to fill out forms and be asked the same questions over and over again, I can’t imagine the sheer frustration they feel.” Unified data systems within and between agencies would reduce the barriers immigrants face.

At the same time, charities often help their clients with technology. Smith professor **TINA DACIN**, who researches social entrepreneurship and innovation, has seen the impact that inferior technology can have on people in need. “You might have four kids at home, but one computer is shared amongst the whole family,” Dacin explains. She says

that charities can play an important role not only in getting technology to people who need it but also in instruction. “It’s a great opportunity for community organizations to come in and hold classes to bring people up to speed,” she says. Without having proper technology themselves, the assistance that these organizations can provide to vulnerable groups suffers.

Donor support

Buchanan is hopeful that donors are starting to understand how vital technology is for non-profits. He shares the example of a charity given funding to implement new software, but no money for the monthly subscription needed to use it. “We were firmly behind them declining the funding because that money would be wasted,” Buchanan says, likening it to giving someone a car without providing them with the means to buy gas. The good news: the funding organization re-evaluated the grant and gave money to support the ongoing maintenance of the new software.

Buchanan also cites the Northpine Foundation, a philanthropic organization in Toronto that offers multi-year funding to groups it supports. It’s an outlier from the standard yearly model. Buchanan hopes that a cultural perspective shift will provide a much-needed update to the way charities are viewed.

“Many social agencies are technology companies that offer a social service, as opposed to a social service that uses technology because they’re 100 per cent tech,” he says. “We need to recognize that the world has changed.” ■

BUILD WAYS TO BE THERE

BY **DEBORAH AARTS**, Artsci'04

How Jack.org founder
Eric Windeler, BCom'82,
LLD'15, turned tragedy
into a transformative force
for youth mental health

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LADY GAGA'S MEGAWATT EYES stare directly into the lens. She is—as usual—arrestingly camera-ready, sporting a chic periwinkle pantsuit and an impeccable manicure as she perches on the edge of a pillow-strewn couch. “When I was younger, I struggled,” she says, her tone conveying the no-shame vulnerability that inspires such fervent fan loyalty. “I needed a framework like this to help me to be there for myself, but also for people around me. This resource can really change the way we interact with each other.”

The pop star is encouraging her followers to take the Be There Certificate, an engaging, and free, online course that trains participants to help others who are struggling with mental health. Her plug is straightforward, earnest and—unsurprisingly—really effective. Almost immediately after her Born This Way Foundation posted the video to its social media channels last March, bright young faces began posting selfies with their own completed #BeThereCertificate on TikTok and Instagram. To date, well over a million people have visited the BeThere.org site and over 17,000 have completed the Be There Certificate.

“It was absolutely incredible,” says Eric Windeler, founder and, until recently, executive director of Jack.org, the Toronto-based charity that developed the Be There Certificate in partnership with the Born This Way Foundation. Yes, an endorsement from a star of Lady Gaga’s magnitude created the kind of shine any cause-based organization would want. But it was also potent proof of how effective Jack.org has been in helping to change the discourse surrounding mental health: here was one of the most famous people on the planet discussing her mental health in the same way she might talk about spraining her wrist.

Normalizing mental health is the work of Eric’s life. He talks about it constantly—on stages, in videos, on social



media—with anyone, from curious teenagers to literal royalty. (Propped against a window in Jack.org’s airy new Toronto office is a framed photo of him and a few dozen of the charity’s young leaders huddling with the then-Duke and Duchess of Cambridge—a.k.a. William and Kate—on the future monarchs’ 2016 tour of Canada.) This has been Eric’s job for nearly 13 years, steering the growth of an initial memorial donation to Kids Help Phone into a \$10 million national charity whose work affects hundreds of thousands of young people.

Eric is a natural builder. He spent most of his career as an entrepreneur, scaling loose ideas into significant business ventures; he’s the kind of go-go-go guy who’s as energized by setting new goals as he is by surpassing old ones. But his CV only partially explains his contribution to Jack.org’s growth. His mandate in doing so has been personal; the mission of a man who’d suffered unthinkable loss and who has since poured his life into making sure fewer people have to. “Eric is the kindest person you’ll ever meet,” says Sandra Hanington, his Jack.org co-founder and wife of more than 35 years. “It just permeates him. It’s the core of who he is.”

Today, as Eric hands off control of Jack.org and moves into a founder role supporting the organization, his attention is firmly on the future. But it’s also an apt moment to take stock; to understand how a shattered father turned a tragedy into a transformative force for good.



Above: Prince William and Princess Kate with Eric Windeler and Alexis Lahorra, a Jack.org leader, in Victoria, B.C. during the 2016 royal visit

Opposite page, top: Eric Windeler with Abeer Ansari, a Jack.org network representative. Bottom: Jack.org's 2022-23 school year network representatives. These are young leaders from across Canada that represent thousands of volunteers in Jack.org programs



It is impossible to tell the story of Jack.org without starting with the story of Jack.

“You don’t,” Eric says evenly, “want to find out about mental health the way we did.”

On the morning of March 27, 2010, as Eric and Sandra were returning to their Toronto home from a routine spin class, his cellphone rang with the worst call any parent can imagine. Their son, Jack Windeler—a bright, active, shy-leaning 18-year-old closing out his first year of arts and science at Queen’s—had died by suicide in his Leonard Hall dorm room the night before.

It’s important here to contextualize just how unspoken and underappreciated mental health challenges were

in 2010. Today, many of us know this to be an issue that disproportionately affects youth. We know that most (70 per cent) of mental health challenges originate in the so-called “transition years” of youth—the period between 15 and 24 when people start college, university or their first jobs. We also now know that poor mental health is by far the most common health issue facing young people, and that suicide is their leading health-related cause of death.

None of this was common knowledge in 2010. In the days following Jack’s death, Eric and Sandra learned that their son had stopped going to class. He’d withdrawn socially and his grades had plummeted. Yet no one around Jack knew to recognize these behaviours as signs of a possible mental health crisis—much less how they might intervene.

After the immediate shock, amid the overwhelming grief that followed, Eric, Sandra and Jack’s siblings, Ben (then 16) and Julia (then 14) each attempted to process what happened. For Eric, this manifested as a burning need to understand. “I was very curious about how this was even possible, because we didn’t know Jack was struggling,” he

HOW TO BE AN ALLY

If you want to help improve youth mental health, Jack.org offers many ways to get involved. Here are three places to start:

1. TRAIN YOURSELF

The Jack.org-developed Be There Certificate online course was designed for youth, but its research-informed framework is useful for anyone who wants to know how to recognize someone struggling with mental health and learn how to effectively support them and guide them to professional help.

2. BOOK A JACK TALK

Jack Talks feature trained youth leaders delivering information and sharing stories to empower audiences to be better informed and better able to help. They’re delivered in-person and virtually, pre-recorded or live, mainly in schools, but also in communities and workplaces.

3. DONATE

There are many ways to support the work of Jack.org, from hosting an event, to making a donation (personal, foundation or corporate), to participating in or sponsoring a rider at the annual Jack Ride cycling fundraiser (jack.org/ride).





Eric Windeler, here speaking at the National Jack Summit, saw an unmet need in mental health: “Young people were effectively being left out of the conversation”

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From a young age, Eric was drawn to entrepreneurship, delivering newspapers at 11 and starting his own painting business at 16. His decision to study Commerce at Smith (“a fantastic experience”) and a subsequent turn at Andersen Consulting, now Accenture (where he met Sandra), were the means to an end of starting up something of his own. Only four years after graduation, he and a colleague started a steel fabrication business, which became Mackie Automotive Systems and comprised 13 factories and 2,000 employees when the pair sold it in 2003. Weeks later, Eric and a different partner began a software startup, which he helped grow and run until Jack’s death.

So it didn’t take many days of volunteering at Kids Help Phone for Eric to latch on to the potential to establish something meaningful.

That initial family donation funded *The Jack Project at Kids Help Phone*, a pilot study that delivered more than 110 talks and workshops to youth, parents and educators in its first year.

The goal was to encourage positive mental health in young people and offer resources to adults to better support them. A team of professional evaluators reviewed the results, and they were emphatic: these sessions were most effective when they were delivered for youth, by youth. This approach reduced stigma, increased help-seeking and, importantly, removed the cringe factor of talking with older people. Furthermore, inside the broader landscape of mental health care, there was a lack of resources and programming to support peer-to-peer work in this demographic. “Young people were effectively being left out of the conversation,” Eric says. “From that moment on, our work became all about engaging young people to be part of the conversation about mental health and to take leadership roles in

recalls. “We thought we were a happy, healthy family with three happy, healthy children.” Bewildered and heartbroken, he turned his investment in a software startup over to his partner and defaulted to doer mode: Where to start to make sense of the impossible? What to do?

As a professional power couple—Eric as a successful entrepreneur and Sandra as a flourishing corporate executive—the pair had the resources and contacts to contribute to something that might help others. A tight group of longtime friends, including **BILL** and **SALLY MORRIS (BCom’82 and ’83, respectively)** and Gillian Evans and **DAVID TOYNE (ArtSci’82 and BCom’82, respectively)** gathered around the Hanington-Windeler kitchen table to talk through ideas. “They really coached us,” says Eric. “They said, ‘Don’t just plunge in

and start a charity. Find a gap that you can fill that will really make a difference.’”

This materialized, initially, as a six-figure donation by Eric and Sandra to establish a memorial fund at Kids Help Phone—a charity Sandra knew well, via recent service on its board. Eric began volunteering with the organization. Before long, he was showing up every single day. “I started to learn so much,” he recalls. He spent hours talking, and as he shared his experiences, and listened to those from other families blindsided by youth suicide, he discovered that they had the same questions: Why did our kid fall through the cracks? What needs to change so no one else does? And who can make it happen?

From the fog of grief came a calling: maybe he could try to make a difference.

educating their peers about it.”

With this mandate, The Jack Project began to grow. In its third year, it transferred its charitable base to Queen’s to test the youth engagement and youth leadership model. At Queen’s, it established what would become its first Jack Chapter to help young leaders recognize and remove barriers in the school community. In July 2013, The Jack Project became an independent charity, with Eric as executive director, and rebranded as Jack.org. As time went on, the charity built out its programming; it added more Jack Chapters (there are now close to 200 across Canada); it developed Jack Talks to train youth speakers to talk about mental health effectively and responsibly; and

it created Jack Summits, where young delegates gather to connect and share big-picture strategies for helping more of their peers. It also bolstered its library of resources (including the development of a training hub called Be There, as well as the aforementioned certification course). Operationally, the charity staffed up, went bilingual, enhanced its fundraising capabilities and, under the watchful eye of veteran board member Sandra, strengthened its governance protocols.

As Eric explains each Jack.org milestone, he takes care to credit (usually by name) the staff, board members and friends who helped make it happen. He is a focused and thoughtful conversationalist, asking almost as many questions as he answers, scribbling notes along the

way. He follows up and follows through. It’s not difficult to see how these traits yield results when applied to the leadership of an organization—especially one devoted to helping people. Did the skills that made him good at building businesses transfer to charitable work? “There’s really not that much that is different,” Eric reflects. “You’re doing most of the same things: You have to manage staff, you need an operations team and you need finance systems. And, of course, you need to be good at fundraising—but, really, that is not overly different from business development.”

In that light, several factors that have driven Jack.org’s growth are not dissimilar from what you might find in an entrepreneurial case study.

Factor one: finding a product or service that fills a need. If the mental health system is a pyramid, with acute hospital care at the peak, Jack.org operates at the base: the more effective its education and support work, the fewer people will end up in crisis. It’s not unlike tackling heart disease by promoting exercise and healthy living, explains Dr. Paul Kurdyak, a psychiatrist, clinician scientist and director of performance improvement at the Centre for Addiction and Mental Health (CAMH), who joined the Jack.org board—which he currently chairs—almost a decade ago. “Their programming is not oriented towards suicide prevention; it’s about youth skill-building, destigmatization and wellness-oriented interventions,” he says. “That has been a really, really important distinction.” This kind of preventive work had been in short supply—Eric took very seriously his friends’ advice to find a gap—and Kurdyak adds that Jack.org has brought a needed rigour and scale to it: “They’re building the army that will push for what hasn’t been pushed for before.”

Factor two: eagerness to evolve with its audience. Every decision about what Jack.org offers, and how the organization offers it, comes in direct response to a simple question: How can we better help young people? Eric’s onward and upward entrepreneurial bent has helped imbue a relentless spirit of continual improvement in the organization. It’s not the kind of place where “that’s the way we’ve always done it” flies. This is one of the main things that drew Rowena Pinto, Jack.org’s new

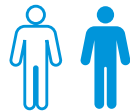
MENTAL HEALTH IN CANADA: BY THE NUMBERS

1 in 5



Canadians experience a **mental illness** in any given year

1 in 2

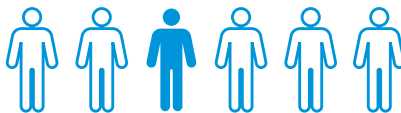


Canadians will have had a mental illness by the **time they turn 40**



Annual **economic cost** of mental health in Canada

1 in 6



youth say they have **contemplated suicide**



of Canadians say the Covid-19 pandemic **worsened** personal mental health



believe attitudes about mental health issues **have improved**



of working Canadians are **reluctant to disclose** a mental illness to their employer

president and CEO, to the organization. “What Jack.org has done so well under Eric’s leadership, and what it continues to do well, is constantly question its intention when it comes to authentically engaging youth,” says Pinto.

Factor three: powerful persuasion. Charities need money to do their work, and individual stories and unique experiences are very effective ways to raise it, says **MONICA LABARGE, BCom’99, MSc’03**, an adjunct assistant professor at Smith whose research covers charitable giving, health promotion and non-profit marketing. Humans are drawn to specificity, she says. It’s why we’re more likely to sponsor a family of endangered antelope than to contribute to a fund that might save 100,000 of them: “The emotional aspect in driving charitable giving can’t be overstated.” The name Jack.org evokes that response in a way that something more generic like, say, Youth Mental Health Advocates does not. The backstory does the same. By now, Eric has shared his family’s personal story hundreds of times, with everyone from youth leaders to politicians to, yes, donors. “It was challenging in the early years,” he admits, but it’s now something he does without hesitation: “It draws people in to what we do.” There are many other elements in Jack.org’s fundraising strategy, but there’s no denying the role of personal stories in getting it to where it is today.



Above: Eric Windeler with his wife and Jack.org co-founder Sandra Hanington and children Ben and Julia during the Jack Ride, a major fundraising event



Left: Windeler and Hanington with their son Jack in 2009, a year before he died

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Which brings us to factor four: a succession plan. Eric began to think about handing off the reins of Jack.org a few years back, shortly after he turned 60. The brutal effect of the Covid-19 pandemic on the mental health of young people was increasing both the need for, and urgency of, Jack.org’s work. And while Eric’s fire for the work had never

burned brighter, he could see how a new leader could drive the organization’s next phase. “I didn’t want to wait until it was too late for an orderly transition,” he reflects.

Ever thorough, he researched best practices in founder-run charity transitions. He met with others who’ve been through this highly specific experience, including the team at Right to Play, the charity founded by former Olympic speedskater Johann Olav Koss. The advice was to be proactive. So he told the board, who enlisted a recruiting firm to help find the right candidate. They found it in Rowena Pinto, an accomplished non-profit executive with impressive experience working in health and with youth. She joined in August of 2022.

Today, after a careful period of transition, Pinto handles all Jack.org leadership and is working to finalize a new strategic plan for the organization’s next phase of growth. Eric’s role is now to advise, tend to key relationships, fundraise and support Pinto and the broader team. He’s mindful that he’s no longer the boss.

And yet Eric Windeler can’t stop looking ahead. When he’s asked how he feels about his legacy, he hedges with a to-do list: “There’s still so much potential for us to make an impact, and to have the most impact, you need to grow,” he says, listing a half-dozen ways Jack.org might help more young people, in more places, in more ways. Then he pauses for a moment. “But when I look at how what we’ve done has resonated with so many people, who’ve been so appreciative of it, it just makes me incredibly proud.” ■

10 experts for 10 years of analytics and ai

It's a big data world.
Someone has to
make sense of it all

A decade ago, corporate Canada was calling for more managers with analytics expertise. In response, Smith created the Master of Management Analytics program. Five years later, as firms began harnessing the power of AI, the Master of Management in Artificial Intelligence launched. More than 1,600 students have graduated from these programs since. Today, they're finding opportunities in the numbers and discovering the potential of machine learning for companies everywhere. To mark 10 years of the MMA (and five of the MMAI), we're featuring 10 extraordinary analytics and AI professionals on the following pages. ▶



Heidi Klotz

GMMA'21
SNC-Lavalin

If you were to peruse the computer storage of any HR department, you would find a veritable Empire State Building-sized pile of documents. There are resumés, employee surveys, onboarding sheets and more. For years, little was done with it. Heidi Klotz is among the HR professionals changing that. Klotz is especially interested in applying natural language processing (NLP) to help employers retain talent.

Take the annual performance review. Once signed off, they're shelved and forgotten. But NLP analysis of performance reviews (across a company or in subsets) can help employers better understand metrics like engagement or behaviour that contributes to either poor or exceptional performance. They can also gauge the risk of employees leaving, Klotz says. "There are just so many possible applications and so much opportunity in the HR space."

Klotz started her career in HR at pharma giant Merck, where she learned how data can help leaders make smart decisions. Today, as vice-president, total rewards—Americas, at SNC-Lavalin in Montreal, she's responsible for all compensation and benefit programs across the company's Canadian, American and Latin American operations, which includes around 15,000 employees.

Data and analytics shouldn't be viewed as a catch-all solution to every HR problem, she says. But it can confirm or debunk long-held assumptions. A good example is the belief that to attract talent, companies must offer higher salaries to new employees. Analysis shows that's not the case. "The data disproves this assumption," Klotz says, "but managers still believe this is true."



Joy Deslauriers

MMAI'20
Amazon

Joy Deslauriers once thought she'd get her MBA or computer science master's. But she wanted management and technical expertise. That led her to the MMAI. Today, she's senior business intelligence engineer and analytics lead at Amazon Ads and teaches a machine-learning course at Smith.

Q. How does AI play into your job?

A. Amazon Ads offers many AI-powered online advertising solutions for businesses of all sizes. My team leverages machine-learning models to improve relationships between sellers on Amazon and advertising agencies. One analogy I've heard is that we're connecting *Mad Men*-level expertise to businesses and creating a mutually beneficial customer experience for both parties.

What's the most important thing you've learned about using data?

It's easy to let our biases influence decisions. So we need to challenge assumptions and bring in a variety of perspectives. Also, while averages can help us understand trends, they can obscure important details and variations that are critical to making informed decisions. Paying attention to anecdotal stories can provide valuable insights that may not be evident from averages alone.

What's your advice for others starting in this field?

Augment your analytics or AI expertise with knowledge in a field you're passionate about. Career fulfilment comes from applying knowledge to something you care deeply about. For me, that has been pursuing projects in financial literacy, small business success and teaching.



Adam Nathwani

AMBA'18, MMAI'21
Drive Hockey Analytics

By now, we've all heard that analytics has forever changed the way pro sports teams are built. In *Moneyball*, analytics showed how players with high on-base percentages can help a baseball club win more games than a reliance on traditional stats, like hits. In the NHL, puck possession now matters, and teams crunch the numbers in search of players who can keep the puck.

But analytics is not just for the pros. Amateur teams, players and coaches are finding that a deep dive into data can improve their game, too. Adam Nathwani is at the forefront of the trend, as the chief operating officer at Drive Hockey Analytics. The Vancouver hockey tech startup offers AI and sensor-based player and puck-tracking technology to college, junior and youth organizations.

"Amateur teams are looking for the same information as the NHL to be more competitive and support player development," he says. Drive Hockey's systems help them do that.

Nathwani's job combines two passions: hockey and AI. Before the MMAI program, he worked in management consulting in the tech sector. He soon realized how important AI was going to become for businesses. Before that, he played university and competitive youth hockey. He has also coached and scouted at the junior levels and done work for the NHL.

What's a key thing Nathwani has learned about technology and data? That they are only tools. "They are not the solutions in and of themselves," he says "Critical thinking and sound judgment are still required to make the best use of data and to apply it correctly to meet business objectives."

A portrait of Divya Tulapurkar, a woman with long dark hair, wearing a white high-necked top and a red jacket. She is standing against a blue background.

Divya Tulapurkar

MBA'17 MMA'17
EY

Growing up in Bangalore, India, Divya Tulapurkar loved math and science. “The ability to use data to infer patterns and determine a logical conclusion was just how my brain worked,” she says.

In India, Tulapurkar studied engineering. But she really wanted a career in which she could apply technology to drive results. So she moved to Canada to earn her MBA. But Tulapurkar wanted more technical knowledge, too. So she completed a Master of Management Analytics degree at the same time, shuttling between Goodes Hall (for the MBA) and SmithToronto (MMA).

Doing two graduate degrees at once in cities 250 kilometres apart is no easy feat for anyone, let alone a newcomer experiencing Canadian winter for the first time. But it was worth it, she says. “I don’t think I would be where I am in my career today if I hadn’t made that decision. The analytics degree positioned me as an analytics translator who could enable organizational changes through the power of data and insights.”

Today, Tulapurkar is a national leader at EY Canada, leading the risk strategy team. They create AI and machine-learning models that help financial institutions increase profitability and improve customer interaction management strategies. Her work can help banks make better lending decisions, including which clients to loan to, credit limits and pricing.

It’s Tulapurkar’s job to translate the work of data scientists and other technical experts into actionable insights. To bring the data to life, Tulapurkar uses what’s known as data visualization—that is, creating visually appealing dashboards that encapsulate model performance, dollar impact and other key metrics. “Data visualization not only helps you understand the data,” she says, “but also creates meaningful insights for decision-makers.”



Michon Williams

MMA'16

Walmart Canada

As vice-president of technology, product management and delivery at Walmart Canada, Michon Williams gets to work in every part of the retailer's operations—from stores to the supply chain—and connects with analytics colleagues from around the world to share best practices. She's also passionate about how technology can be used to help restore our planet's health.

Q. What got you interested in analytics?

A. I had worked in technology at a major financial institution for about 10 years when I realized the next step after digitizing customer experiences and business functions would be using data as an asset to evolve every aspect of the business. Most technology can't work well without good data, and good data can't be made possible without good technology.

How does data and technology play into your work at Walmart?

Every aspect of our business relies on—and is made more effective through—good data and analytics. We spend a lot of time thinking about how we can keep prices low for our customers, something we're deeply passionate about as a company. Analytics are critical to helping us operate at low cost so we can deliver everyday low prices. For example, in stores we use computer vision and visual analytics to help associates stock shelves more efficiently and to inform store layout improvements.

How can analytics help businesses make smart sustainability decisions?

For so long, businesses have been managed based on financial measures. Increasingly there's more measurement of customer experiences. I imagine a world where we start to measure and understand, in a much more fulsome way, our environmental impact, including end-to-end in supply chains and the products we buy and sell. If we aspire to run businesses that put back more into the world than we take out, we need to expand what metrics we look at when measuring success.

What's your advice for others starting out in this field?

I've always been an immensely curious person. I would tell any student starting out in analytics that curiosity can be your biggest superpower. Whether you're trying to understand a business problem from several angles or trying to learn a new tool or language like Python, use your curiosity to help you push through.

Advait Bopardikar

BCom'14, MMAI'19

Google

An upset on a favourite game show got Advait Bopardikar interested in artificial intelligence. After graduating from Commerce, he went to IBM, then became part of the first class in Smith's Master of Management in Artificial Intelligence program. Today, he is the machine-learning practice leader at Google Cloud in Toronto.

Q. What do you do with AI at Google?

A. I speak with our customers at various levels of maturity on their artificial intelligence journeys and teach them how companies like Google do AI at scale. This means I spend every day talking to industry experts to solve problems. I also spend time with the engineers and researchers at Google who are working on the latest methodologies that eventually become commonplace in the AI community.

What drew your interest in AI?

I'm a big fan of *Jeopardy*. In 2011, I watched *Jeopardy* champions Ken Jennings and Brad Rutter lose to IBM Watson, and it sparked my fascination with machine learning and natural language processing. That led to my career at IBM to work on implementing Watson chatbots to improve customer experience and automate customer service.

Speaking of chatbots, what potential do you see for them?

I'm excited by the pace of innovation and product development pushed by conversational AI. The impact will be substantial in the way it can service customers and customize the search, discovery and sale of products. Beyond language, when you add in voice, image, video and music, you can spotlight people's creativity. I'm also interested to see what it does for entrepreneurs and small businesses that can now scale their impact with fewer resources.

What's one important thing you've learned about using data in business?

The more experience you have with data, the more you realize that the economist Ronald Coase was probably right—that "if you torture the data long enough it will confess" whatever story you want. Data professionals must know how to tell stories and explain the implications within the business. And managers should learn data fundamentals so they don't fall prey to the "Quantitative Fallacy," which is to make decisions based only on data and ignore everything else.





Yannick Abba

MMA'15
Scotiabank

Last year in January, the Institute of International Finance chose 55 people from around the world for its Future Leaders Class of 2022. The annual list recognizes financial-industry up-and-comers. One of those on the list: Yannick Abba, who is vice-president, centralized operations and governance at Scotiabank's Global Contact Centre.

Q. What drew your interest in analytics?

A. My passion for analytics stems from my fascination with data. I've always been captivated by the power of data to convey compelling stories. I believe that using data to support ideas or analyze past events can have a more significant impact, as people are more likely to trust and find meaning in data-driven insights.

What's one key thing you've learned about using data in business?

Achieving success in data and technology projects can be time-consuming, but it's important to align the project scope with the business cycle and deliver in increments to generate momentum, enthusiasm and financial support. Rarely are you given the luxury of building a rocket ship without demonstrating value at every step of the way.

What's your advice to someone starting in the analytics field?

Investing in your soft skills, particularly your ability to coach a team and articulate the value of your work, is crucial. While those outside of analytics or AI may not be interested in the technical intricacies of your data model or AI system, they will be interested in how they can use it and why. It's essential to clearly communicate the project's objectives to your team and ensure stakeholders understand its impact once it's complete.

What do you do with analytics at Scotiabank?

As a team, we strive to enhance the customer experience and build stronger relationships. One of our key objectives is to minimize wait times for customers who reach out to us, expedite the resolution of their concerns and offer them sound advice. We devote significant time and effort to achieving these goals.



Michael Stanisz

MMA'14

Revenue Management Labs

The right price, at the right time to the right customer—is a holy grail for businesses. Surveys of CEOs show that many worry their pricing strategies leave money on the table. That's where revenue management comes in. By applying data and analytics, companies can better understand what they can charge based on a host of factors, including market conditions, consumer demand and inventory. And getting it right matters.

Few know that better than Michael Stanisz, partner at Revenue Management Labs, a pricing consultancy in Toronto. Small price increases can add up to significantly higher profits, he says. Revenue Management Labs works with clients across a variety of industries, helping them optimize revenue through pricing.

Stanisz co-founded the company in 2015, not long after he graduated from the first MMA class. Before that, he oversaw English Canada pricing at Labatt Breweries. Today, Revenue Management Labs employs around 30 people. Lots of consulting companies advise on price, but Stanisz says his firm goes deeper in its analysis—looking for price opportunities on a SKU by SKU basis and through sophisticated promotions strategies.

As an example, he cites an ice cream maker that had been told to raise prices by five per cent across the board. But that didn't take into account individual market and retailer variations. A more nuanced approach was needed, with data to show how price increases paired with promotions could be a win-win for the ice cream company and supermarkets. "We get to the granular level," Stanisz says, "which makes our recommendations a lot more tangible."



Emily Chambers

BCom'09, MMA'14

The Walt Disney Company

Emily Chambers has had lots of magical moments in nine years at Disney in Orlando, where she is manager, decision science products. A favourite: taking her mom to the 25th anniversary of the *Lion King* on Broadway—which, she says, "felt like a full circle moment" 20 years after she first saw the show.

Q. How do you use analytics in your job?

A. My organization operates as the analytics centre of excellence for The Walt Disney Company, so analytics is at the core of everything we do. As an example, I've led the development of the revenue management systems used by Disney's shows in New York and London.

What's one key thing you've learned about using data in business?

There is a saying at Disney that is very applicable here: "Change is constant and purposeful." It is so important to continue learning and evolving our products and offerings to stay relevant and provide the most value to our clients. On the flip side, it's just as important to be intentional about what new technologies you implement. Otherwise, you may chase the latest trends without adding value.

What's your advice to someone starting in the analytics field?

Hone in on what your strengths are and what impact you'd like to have to find a role where your skills can shine. I will never be able to compete with the PhD-level statisticians developing algorithms. But where I can add value is in bridging the gap between business and science to generate actionable insights from the model output.



Kishawna Peck

MMAI'23

Toronto Womxn in Data Science

Five years ago, Kishawna Peck was working at a fintech company. She was the only data analyst in her department and looking to attend conferences in technology geared to women. She couldn't find any in Canada. So she created one. In just six weeks, she got speakers and sponsors and drew more than 100 attendees to the first annual Toronto Womxn in Data Science conference.

Today, as the organization's founder and CEO, she's aiming higher. "Our mission is to empower a million women to become data literate, increase the recruitment and retention of women in data roles and influence inclusive innovation." Today, Toronto Womxn in Data Science's activities include a podcast, job board, micro-events and a #100DaysofCode challenge.

Only around 20 per cent of data scientists are women. Peck says women aren't often encouraged to pursue STEM careers. Also, recruitment systems are geared to men, and hiring managers often "don't believe women can thrive in a technical role," she says.

Retention is also an issue. Companies tend not to make inclusion a priority in tech. So diversity practices don't count much when sexism and racism are still issues for women. "Without companies examining and reconstructing their non-inclusive environments, harm will continue to be done," she says. "It's like filling a leaky bucket."

With Toronto Womxn in Data Science, Peck aims to change that. "We're seeing more women and women of colour participate in our data literacy programs," she says. "This gives me hope that the participation of women in data science will increase over time."

COMING TO

BY GAYATHRI SHUKLA





What's it like being a newcomer in a foreign land? How do immigrants reconcile their new home from their old one? As Canada bolsters the number of immigrants it takes in over the coming years, we asked **GAYATHRI SHUKLA, EMBA'19**, to delve into these questions and more. Shukla recently worked with more than 30 women to tell their stories of immigration to Canada, which were published as an anthology. In this essay, she writes about that journey, her own experience as a newcomer and the lessons she learned along the way.

"DO YOU REMEMBER the first time you thought about moving to Canada?" Last year, I posed this question to more than 35 women taking part in a storytelling workshop I was leading over Zoom.

"Or, if you were born in Canada," I continued, "do you remember the first time you realized that your family came from somewhere else... the moment you knew there was another home?"

A palpable pensiveness fell upon the virtual room. We were about to begin our journey. ›

Over the next few months I would lead this group, who had come from all over the world to Canada, on a literary odyssey. Through a series of workshops, I would ask them to unearth memories—some cherished, some bitter—to capture the life-changing experience that is immigration, and then write them in their own 1,000-word story.

I had so many questions for them to answer: What was your home like? What do you remember most about your country, your family, the food, your friends growing up? How did you find your way to Canada (and *why* Canada)? What obstacles have you faced here? And how do you feel looking back on it all?

My goal was to take their stories and compile them into a book that would tell a more intimate tale of immigration than we often hear in the headlines. *Landed: Transformative Stories of Canadian Immigrant Women* was published last fall. There are 37 chapters. Each is a person's life—a story of someone who came to Canada, told in her own words. But these are just a few stories among millions happening right now.

FINDING A NEW HOME

Canada is a nation of immigrants. That's what we're always told. And it's true—even today. *Especially today*. Twenty-three per cent of people in Canada are immigrants, according to the latest census. That's the highest share ever. (The previous record was in 1921 when, after a flurry of immigration from Europe, it reached 22 per cent.)

Today, people come from all over the world to live here. Immigration has shaped this country—powered its growth even—and will continue to do so. Last November, the federal government announced that it was ramping up immigration by bringing up to 500,000 newcomers a year to Canada by 2025. That's double recent targets of around 235,000. Within 20 years, immigrants could represent anywhere from 29 to 34 per cent of the population.

We often talk about immigration in big numbers like these. But 500,000 immigrants equals 500,000 individual stories of happiness, sadness, longing, opportunity, setbacks, hard work, sacrifice and resilience. If we truly want to welcome immigrants, shouldn't we understand what they've gone through?

That's what I hoped to do by anthologizing the stories of women immigrants.

Of course, to tell their story, I must also tell mine. That's because I'm an immigrant too. In fact, I've moved twice to different countries. I was born in India and, when I was three, my parents moved our family to Saudi Arabia (owing to my father's work as an engineer.) But Saudi Arabia offered limited opportunities for a young girl like me. I wasn't allowed to pursue higher education or even drive. Then came the Gulf War. I remember air raid sirens and having to put on gas masks at school.

We moved to Canada in 1998 when I was 15. I still remember the plane touching down in Calgary. It was a beautiful August afternoon. We were immigrants, but this time things were different. In Saudi Arabia, we were segregated from the homegrown population. In Canada, we were expected to integrate. My brother and I quickly adapted our English to the Canadian accent and traded words like “queue” and “rubber” for “lineup” and “eraser”.

I fell in love with Canada but things weren't always easy. Though my dad's experience as an engineer had allowed us to get into Canada, once here he couldn't find a job in his field; he was repeatedly told he lacked Canadian work experience. So, in his 40s, he returned to university to study software technology. My mom's chemistry degree also didn't land her a job. She ended up working entry-level cashier and bank teller jobs.

I did well enough in high school that I got into an advanced program called International Baccalaureate. But a family friend cautioned me: “Immigrant? Better work twice as hard.” For me, that wasn't a problem. I was always willing to do what it took to succeed. And I did. I went to the University of Calgary to study engineering on a scholarship. Then I headed to Fort McMurray as one of the few women of Indian origin working in the oil and gas industry there. Eventually, I

returned to Calgary to continue working in the energy sector. That is, until I decided to make storytelling my career.

TWO SUITCASES

My journey with storytelling started first as a pandemic passion project. The idea was sparked during my EMBA New Ventures class. I wanted to help leaders better appreciate diversity and build more inclusive cultures. Diversity and inclusion (D&I) is not new. Its business case is well established. But my experience with D&I efforts had revealed a crucial gap: many failed to get implemented or adopted into organizational culture. A more intuitive, human-centred approach was needed.

This led me to certify in a method of storytelling called guided autobiography, an evidence-based way of helping people recollect and share their lived experiences in group settings. I began hosting workshops using this method for companies and colleges. I witnessed how the power of storytelling enabled teams to break down walls, regardless of their background, and build bridges of shared understanding, trust and respect.

In fall 2021, I founded Campfire Kinship Storytelling Inc., trading my 17-year corporate engineering career for entrepreneurship (campfirekinship.com). At the time, I was also volunteering as a board director at the Calgary Immigrant Women's Association. I had a hunch that what I knew about immigrant women's stories was not told or heard broadly enough. I proposed the anthology idea to Calgary Arts Development and was grateful to receive their grant funding.

Nothing could have prepared me for the response to our call for applications. Countless women and gender-nonconforming folks in Calgary expressed interest in being part of the anthology. (I can't help but wonder about the wealth of stories waiting to be told across Canada.) Selected participants represented 30 countries of origin with varying immigration pathways: international students, skilled workers, family members and refugees. Some were born in Canada to immigrant parents. But all shared one



Gayathri Shukla:
 "I had a hunch that
 what I knew about
 immigrant women's
 stories was not told or
 heard broadly enough"



desire: to leave a legacy in the form of a written story.

There was Anna Zakharova, for example. Today, she's a family school liaison worker in Edmonton who loves snowboarding. But nine years ago she was living in Crimea. Then the Russians invaded and Anna and her family had to flee. "I was not upset about leaving," she recalls in her chapter, called "Two Suitcases". "Rather, I feared being detained by Russian paramilitary and tortured like the co-ordinator of our protest movement in Crimea. Or being found dead in a ditch..."

In Canada, she studied community social work, but like so many immigrants had a hard time getting hired. For a while she worked in a homeless shelter, noting that most of her co-workers were immigrants, too. "They came here for a better future for their children in a democratic country. However, the price was to be stripped of their former social status, education and work experience." Anna found joy in volunteering with the local Ukrainian community. But she still dreams of returning to Crimea to collect the family albums that did not

fit in the two suitcases she fled with.

Then there was Kelly Kaur, born in Singapore and who recalls her neighbours as "Malays, Chinese, Indians and others from around the world." Kelly came to Canada as a student and was suddenly a visible minority. "I found out that to be an immigrant is to forever be caught up in an insider-outsider dance."

Kelly felt the pressure to succeed as an international student but said it's often small things that are disorienting for newcomers—the loss of familiar foods or dealing with four seasons for the first time. In the end, she writes that being an immigrant is to "live a dual life of negotiating the best and the worst from one tradition, culture, country, and harmonize it with my new country."

LESSONS LEARNED

As project lead and workshop facilitator, publishing this book of stories was a labour of love for me. It has gifted me with insights and takeaways on what it means to be Canadian, which I would like to share with you.

The first takeaway is about *identity* and honouring your roots. Admittedly, this isn't the type of thing that makes it to the top of people's lists. Truth be told, I loathed the times I've been randomly asked, "Where are you from?" It's an innocuous question, but as a visible minority, it has an othering effect on me: Will I ever be "Canadian enough," despite Canada being my home for 25 years? In my opinion, framing a question around a person's *heritage* is a better approach, once you've gotten to know them a bit.

Putting pen to paper for my story in *Landed* (titled "Jasmine Flowers"), helped me reconcile a part of my identity that I had grappled with since moving to Canada. My name is *Gayathri*, which my grandmother gave me at birth.

"Jasmine Flowers" is about my late grandmother who was not allowed the opportunity to pursue her dreams of higher education. But she always encouraged me to pursue mine. It's a big reason why my parents decided to come to Canada. Although my name is common in India, it is difficult to pronounce in Canada. I have been advised to shorten or anglicize it. Studies have shown that foreign-sounding names receive fewer job interviews than English-sounding ones.

CENSUS SAYS: IMMIGRATION IN CANADA



1 IN 4

PEOPLE LIVING IN CANADA IN 2021 WERE IMMIGRANTS OR LANDED RESIDENTS



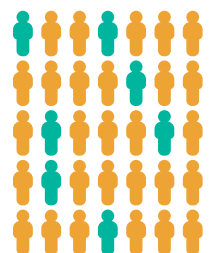
1 IN 3

PEOPLE IN CANADA WILL BE IMMIGRANTS OR LANDED RESIDENTS BY 2041 IF TRENDS CONTINUE



56.3%

OF RECENT IMMIGRANTS WERE ADMITTED FOR ECONOMIC REASONS



FROM 2016 TO 2021, IMMIGRANTS ACCOUNTED FOR

80%

OF LABOUR FORCE GROWTH IN CANADA



218,430

REFUGEES WERE ADMITTED AS PERMANENT RESIDENTS TO CANADA FROM 2016 TO 2021

Still, I chose to keep my name. I now let everyone know it's OK if they falter with its pronunciation. I will help them get it right, and I want to get their names right, too.

My point is this: our names, our family heritage and our stories form integral parts of our identity. It takes courage to look inward and to hold space for the parts of you that you felt you had to hide or cast away. Give yourself permission, anyway. Reclaim your truth, and do it in a way that feels authentic to you.

The second takeaway relates to *privilege*—a loaded word for its effect in triggering guilt or defensiveness. But when you compile a set of stories as diverse as those in *Landed*, it is hard to un-notice patterns of inequity and privilege.

It was disturbing but not surprising, for example, to see that many participants of Asian and African descent in *Landed* faced racism versus those of European descent. I also noticed a painful theme around uneven access to opportunities experienced by refugees, versus those who had a choice to immigrate (and were thus able to bring with them their bank balance or command over English or French). Nevertheless, every story is a testament to overcoming adversity and unlocking the personal power to transform and grow, despite systemic barriers.

One such example is in the story “Magic of Kindness”, where my co-author, Elena Esina, describes her transformation into wanting to help others: “Because of those [kind] strangers, I have been giving back ever since that first smile at the gate.” Or, Anusha Kassan’s story, “The Seemingly Impossible Quest and Longing for Change”. Anusha sheds light on her relentless pursuit for equity in her profession of psychology: “Until true, systemic change takes place, and racist, discriminatory, unjust structures are dismantled in our society, I know I will not be able to rest.”

The idea here is not about cross-examining who has more privilege or less. I believe the real question is: What do we do with the

privilege we have? It is a question I hope will inspire more of us to reflect upon our individual power to affect change. It is how we will be remembered in the end.

GIVEN A CHANCE

My third takeaway connects to the universal human need for *belonging*. I was fortunate to experience it during the storytelling process itself, but it didn't come easy. I learned that the act of reflecting on what home means to you can shatter your heart open. This was intensified by timing—the horrific invasion of Ukraine was transpiring just as we submitted our first book drafts in February 2022, triggering memories of trauma for those who had experienced war and displacement in their lives.

At the same time, I learned how we can rebuild the pieces, one by one, thus emerging fiercer, kinder, and truer to who we are. Our workshops became a place of safety, of releasing pain, of transcending borders, of solidarity, of declaring our joy and power, and of healing. It culminated in a grand moment on stage celebrating the success of our book launch, while seeing first-hand just how much representation matters.

My hope for everyone is that you find your way to belonging too, no matter who you are and whether that be through storytelling or otherwise.

The American writer and transgender rights activist Janet Mock, the author of *Redefining Realness*, once said, “Telling our stories, first to ourselves, and then to another, is simply a revolutionary act.” Inside the stories in *Landed* and through these women, I discovered a kind of grace and determination I had never witnessed before.

What I want all Canadians to know is that ultimately, immigrants who come to Canada just want to be given a chance. And I believe that what my story and so many other stories go to show is that when given the opportunity, our potential is truly transformative. ■

Seven mountains

Reaching the highest peak on every continent is a dream for many climbers. Only a few have done it

BY ROBERT GERLSBECK



Andrew Dawson climbed Denali in Alaska last spring

MOUNTAINEERS, THAT IS PEOPLE WHO love the thrill of getting to the top and returning safely to earth, have their bucket-list peaks. There's Everest, of course. And for a few, K2, slightly shorter than Everest but technically harder and thus deadlier. In Europe, the Matterhorn beckons, and in America, Rainier throws ice and storms but rewards with unforgettable Pacific Coast views.

Then there's the seven summits, the tallest mountain on each continent. The first person to climb them all was Texas oil magnate Richard Bass in 1985. Asked why, Bass pointed to his business success: "If that's all I was chasing, it would be an empty bauble of accomplishment. I know a lot of executives who wake up and say, 'My God, there's got to be more.'"

Bass was an amateur. But a year after his seventh peak, Reinhold Messner, perhaps the greatest-ever mountaineer, did it too. Not everyone agrees on where one continent ends and another starts so the Messner and Bass peaks differ slightly. Most climbers now follow Messner's, which is, from tallest to shortest:

Everest (Asia, 8,848 metres); Aconcagua (South America, 6,961); Denali (North America, 6,190); Kilimanjaro (Africa; 5,895); Elbrus (Europe, 5,642); Vinson (Antarctica, 4,892); and Puncak Jaya (Australasia, 4,884).

Only around 500 people have topped all seven. One is **SAMUEL SHORT, EMBA'02**. An engineer, he works at the Institute for Manufacturing at the University of Cambridge in England. As a teenager in Britain, rock climbing sparked an interest to go higher. Later, working in Canada, he headed to the Rockies. Eventually, he set his sights on Everest.

"That was the dream," Short says, though he admits he wasn't sure he had the skills. "I'd been up around 6,000 metres, but I didn't have all that much mountaineering experience." He was finally convinced he could climb the mountain after chatting with some guides during a trek in Nepal. Short reached the top of Everest in 2008 and figured that was that. But then he heard other climbers talk about the seven summits and got hooked. One by one,

he ticked off the Messner list. His last, Denali in Alaska, was in 2016.

Reaching all seven summits was exciting. But the best part, he says, was the journey to each one. Puncak Jaya is deep in Western New Guinea. Short recalls flying through the jungle in a small airplane ("There were wild pigs on the runway when we landed.") and taking a memorable motorcycle ride to the base of the mountain. In Antarctica, Short played volleyball and skied under 24-hour summer sun. Then there was the camaraderie with people he'd only just met but had to rely on to scale treacherous terrain.

Which mountain was toughest? From a technical standpoint, Denali in Alaska, he says. But Everest was the



Above: Samuel Short at the top of the world on Mount Everest in 2008

Left: Wesley Li having some fun during his climb of Mount Elbrus in Russia

most strenuous. “Above 7,000 metres, every step is painful. Above 8,000, it’s unbelievably difficult. Every two or three steps, you have to stop to catch your breath.”

Some try to reach the seven summits as fast as they can. The record is 117 days. But many tackle one or two mountains a year at most. Others see the seven summits as a goal to be savoured slowly. That’s how **WESLEY LI, MMAI’22**, views it. “I’d rather take a bit longer,” he says. “It reminds me I have something big to accomplish for the rest of my life.”

Li grew up in China and climbed in his youth. But after moving to Canada (he now works at TD in Toronto), he put away his mountain gear. A few years later, a colleague raved about a journey up Kilimanjaro in Tanzania. It’s the world’s tallest standalone mountain (i.e., not part of a range) and though near the equator can have snow year-round.

Kilimanjaro is breathtaking up close and from a distance. Suddenly, Li felt the urge to climb again. He reached the top of Kilimanjaro in 2018 and immediately decided to chase the other six.

In 2019, he went up Mount Elbrus in Russia. The final push started in the dark before midnight. By 6 a.m., the sun was rising, and two hours later Li and his party reached the summit. He was elated. But he also knew that going down a mountain can be more dangerous than up. During the descent, clear skies gave way to clouds and snow. “It was all a blur,” he recalls. “You could only see two metres away. If you took a wrong step you might fall. No one would be able to help you then.”

ANDREW DAWSON, BCom’14, is more than halfway through his seven summits pursuit. A global brand manager for Tazo tea in the Netherlands, he has climbed four of the seven mountains. His first

was Kilimanjaro on a trip to Africa in 2010 with his parents and two brothers (his dad is **MIKE DAWSON, BCom’78**). On summit day, Dawson, then 18, and his brothers sprinted ahead of the group to what’s known as Gilman’s Point to watch the sun come up, and it was there he fell in love with the mountains. “It was this feeling of ‘Wow!’ I loved being above the clouds and the exhilaration of being this high up.” Fast-forward to the summer of 2014 and Dawson was working in Calgary for Unilever. On weekends, he’d head to Banff National Park to go hiking with friends. Once, he met a fellow mountaineer who shared amazing tales of scaling Aconcagua in Argentina, the highest mountain in the world outside Asia. Inspired, Dawson climbed it in 2017. After, he thought: “Well, I’ve done two of them. What’s next?”

The answer was Elbrus in 2019, followed by Denali last spring. In between, he also climbed Mont Blanc in France. Some believe Mont Blanc is the highest peak in Europe because, they say, Elbrus is really in Asia. There’s a similar debate between Puncak Jaya and Mount Kosciuszko, a shorter peak but the highest in Australia. Dawson aims to climb Puncak Jaya next year and scale Kosciuszko, too.

Better equipment and technology helps today’s climbers. But mountain weather is unpredictable and a lack of oxygen at extreme heights means that summiting is never a sure thing. Around half of Dawson’s fellow climbers on Aconcagua did not make it to the top due to altitude sickness and other problems.

Mountaineering comes with danger as well. On the way down from Elbrus a snow bridge collapsed and a member of Dawson’s rope team was left hanging for his life over a 100-foot crevice, before being rescued. Dawson also had to brave minus 40 Celsius to reach the top of Denali a year ago. It was, he says, his toughest climb. In 21 days on the mountain, his team almost ran out of food and three of eight members were not able to summit for various health reasons. Two other climbers (not in his party) died.

So what’s the allure of the seven summits? A sense of accomplishment for sure, says Dawson, plus the adventure. “There’s something special about saying you’ve done something that almost no one else has.” ■

Power player

Magali Harvey, MBA'23, is a rugby star who has learned to lead on and off the pitch

BY SADIYA ANSARI

MAGALI HARVEY DIDN'T START playing the sport she would later be named best in the world at until she was 16. Growing up in Quebec City, sports were an affordable option for her parents to put Harvey and her three sisters in. "The house was empty and we weren't in trouble," she says.

Harvey was naturally athletic and embraced extracurriculars like ultimate frisbee and soccer. When rugby was introduced at school, Harvey had little interest. But an older player goaded her into joining the team and, at her first practice, she ended up with a bloody nose after a brutal tackle. That moment became imprinted on her, and as a winger, she learned to run for her life. Speed became her superpower. Two years later, she was trying out for the under-20 national team and headed to St. Francis Xavier University in Nova Scotia.

While a combination of natural talent, grit and determination propelled Harvey into becoming a world-class athlete, what has added a dimension to her game are the lessons she's learned about leadership along the way. Early on, Harvey witnessed polar opposite examples of coaching based on fear and encouragement. Her development—both inside and outside of athletics—came from building on those lessons, applying them as a university-level coach, an MBA student, and now as a more experienced player in Spain.

In Harvey's first year of university, her team won the nationals and she was named the most valuable player of the tournament. That led to a Canada Sevens coach asking her to try out. Harvey surprised herself by making the cut. Coming from a humble background, the idea of supporting herself through sport became more appealing than finishing school, so she quit in her third year and moved to Victoria, B.C. to devote herself to rugby full time.

A speedy and elusive runner, Magali Harvey was the first Canadian to win World Rugby's Player of the Year award



But Harvey's time on the national team could be gruelling. Harvey felt the coaches chose favourites. (Two years ago, 37 past and present members signed a statement saying the team's bullying and harassment policy failed them.) She ended up being taken off the Sevens team and instead played Fifteens, a blessing in disguise that exposed her to a totally different coaching style. The messages from her new coach felt alien to her—things like: "you're creative on the field so I'm not going to try to box you in" and "just have fun and be a good person."

That move led her to be part of the team that reached the finals in the 2014 World Cup. That same year, she was named World Rugby's Player of the Year, which cited her "electrifying pace, elusive running, ferocious defence and accurate place-kicking." A year later, she was part of Canada's gold medal-winning Sevens team at the Pan Am Games. But somehow, that still wasn't enough for Harvey to clinch a spot on the Olympic team—crushing her after all the sacrifices she made to play.

So Harvey headed abroad, playing in New Zealand before returning to Canada. She enrolled at Concordia while also coaching the McGill women's rugby team. She was nervous as a

coach initially. At times, the leadership style that she had chafed under started to show in her own coaching. "The truth is, this scary thing happens when you get bullied and coached a certain way—you're like, 'Oh, this technique works,'" says Harvey.

When her partner at the time attended a practice, she told Harvey that her approach was a bit harsh, resembling some of the things Harvey herself hated about past coaches. "Suddenly I was patient, more communicative and kinder," says Harvey, laughing as she recalled how confusing that must have been for the team.

From there, Harvey wanted to cultivate her leadership skills and was accepted into Smith's Full-time MBA as a Game Plan award recipient. Working with the same small team of students taught her valuable lessons about navigating relationships. "It's not about the grade anymore—it's about making sure you connect with people," she says. She completed her degree as class valedictorian.

Now, Harvey is taking a "break" by returning to rugby before entering the traditional job market. In January, she started with a club in Madrid. As a more experienced player, her contract includes coaching duties. "Rugby has always been my happy place," she says. ■

People who make a financial plan have two to three times more money in retirement than those who don't, says Lesley-Anne Scorgie



MEET THE MONEY EXPERT

Lesley-Anne Scorgie, AMBA'12, knows the secret to getting rich—and is happy to share it

BY ROSALIND STEFANAC

AT THE AGE OF 10, Lesley-Anne Scorgie made her first critical financial decision. She put \$100 gifted from her grandparents into a Canada Savings Bond instead of a new bike. Ever since, she has been building her investment portfolio, and sharing her money-making insights in the process.

As a bestselling author of books like *Rich By Thirty*, newspaper columnist, professional speaker and business owner based in Toronto, this money guru is determined to demystify the road to riches for the masses—provided they're willing to put in the work. *Smith Magazine* contributor Rosalind Stefanac spoke with Scorgie about how she developed her investing acumen, why she launched her personal-finance consultancy, called MeVest, and what money question she gets asked the most.

Rosalind Stefanac: What made you want to make that first investment as a 10-year-old?

LESLEY-ANNE SCORGIE: Growing up, we struggled financially and my parents didn't earn enough to be able to do any investing. But they did teach me the principles of compound

interest, and the idea of making money on money intrigued me. My mom also suggested I raise the funds to buy my bike by doing yardwork, delivering flyers and babysitting, and six weeks later I had earned enough. After that, I just hit repeat. I worked odd jobs, hired friends to do the jobs I didn't have time for, and anytime I came into money, I added it to my savings account and bought additional bonds. At 14, I started buying mutual funds. By 17, I was tracking to be a millionaire by 25.

You were on *The Oprah Winfrey Show* soon after. How did that happen?

I was helping my high school teacher run a financial literacy class in Calgary, where I grew up, and I was profiled by the *Calgary Herald*. The article went national and caught the attention of the Harpo producers [from Oprah's show] who flew me down to Chicago. During the segment, I told an audience of more than two million viewers about my million-dollar plan.

Were you right on track?

No. In my early 20s, I was working in the oil and gas industry, writing bestselling books and making a ton of money. I paid off my first house by 27. But I had neglected the principles of good money management. The 2008 financial crash impacted my portfolio and I had overdone it on my spending.

When hundreds of journalists followed up to see if I'd reached my million-dollar goal, it was a super-low moment for me and I was so embarrassed. I lost my focus and suffered from anxiety and depression. Fortunately, through therapy and formal money mentorship, I got back on track and hit that milestone by the age of 28. More importantly, though, I healed my money mindset and felt so much better.

Why did you start writing books about money?

After the Oprah show, I started my career in financial media to share what I had learned so far. *Rich By Thirty* was my very first go at writing, and it was challenging, but it's been the most successful of all my books by far. My goal was

to provide the money guide everyone should have had access to in high school. It came out at a time when there was almost nothing for young people in the financial literacy space, so it was an instant bestseller and later republished around the world.

My other titles, *The Modern Couple's Money Guide* and *Well-Heeled: The Smart Girl's Guide to Getting Rich*, were a natural progression and also sold really well. The third book was my passion project because it focused on women and the challenges and opportunities they have with money. I just feel that there are so many ways for women to take control of their money to feel stronger about their financial future.

Why did you start your consulting company, MeVest?

I wanted to help people, especially women, build financial confidence with more personalized in-person and digital money coaching and courses. Now, 78 per cent of our clients are women and 30 per cent of them are entrepreneurs applying good financial hygiene in their personal lives and businesses.

When women are specifically mentored around money in business, they really thrive. It wasn't an easy path though. When I first launched this concept of financial e-learning and online coaching in 2014, it was a total flunk—the market wasn't ready for it and neither was I. Luckily, I got through by the skin of my teeth and now have a much more focused, scalable learning model with a great community of clients. Today, my small but mighty team of five serves just over 4,000 clients.

What's a common money question people ask you?

How do I make my first million dollars? If I had a dime for every time I'm asked, I'd be rich on that question alone. I get it. My story was built off of making my first million, but I find new students and clients often want what I have without the trials and tribulations. The good news is, with a strong set of financial skills and a healthy money mindset, that first million is possible for many.

Another common question is around how to make passive income. I always ask if they are willing to do the work

and investment needed to create a passive income stream, and if not, it's not going to be an option. Today, I have eight streams of passive income, and they all required investments and a clear strategy.

Is there a common misconception about wealthy people?

That we are great with numbers. You can be terrible with numbers and still be financially successful. It's more about discipline and understanding your strategy. You can always hire others to take care of the numbers.

What's a major mistake people make in trying to grow their wealth?

Not having a financial plan or not prioritizing making that plan. The research shows that those who take the time to make financial plans have two to three times more money in their retirement years versus those who don't. And despite what those on social media tell us, no one can make it rich on their own. Successful people make plans, they seek advice and have money mentors. I spent many years being formally mentored by my aunt, who is a successful entrepreneur in commercial interior design.

Why did you choose to get your graduate degree at Smith?

I was initially toying between doing my CFA or MBA, but the latter was better suited to my entrepreneurial heart. It was a no-brainer coming here because of the program's reputation and networking opportunities. I love that the Smith professors are on the same speaking circuit I am, and we get to inspire audiences. It's a place where big personalities can really shine, and I fit right in.

What's next for you?

With MeVest, we're moving more into the sphere of positive money psychology paired with powerful money skills. It's a peaceful approach for women to experience their money as a resource to help them get what they want. I can tell you, when I see women work on their mindset and have money tools, they are unstoppable. ■

Moving pictures

Phil Connell, BCom'01, switched careers to pursue his passion for movies. His first film starred a Hollywood legend in her final leading role

BY CHRIS POWELL

THERE'S A KIND OF Hollywood mythology, perpetrated by movies like *The Fabelmans*—a loosely told version of Steven Spielberg's formative years—that filmmakers know from a young age that making movies is what they want to do with their life. They're often portrayed as precocious, pursuing their dream with a single-minded focus. There typically isn't room in the myth-making apparatus for the story of someone who finds their acumen for filmmaking relatively late.

But Phil Connell travelled quite a way down the business road, caught for several years in a weird space between the corporate and artistic worlds, before finally taking the off-ramp to a movie-making career, something that had been tugging at him since his university days.

There were some minor speed bumps on the road less travelled, but the Toronto-based filmmaker has since amassed an impressive resumé that includes more than a dozen commercials, including a 2016 spot entitled "Ahlan Bear" that addressed the Syrian refugee crisis. The spot won a Silver Pencil at the prestigious advertising awards show *The One Show* and was also shortlisted at the Cannes Lions advertising festival.

But it was his first feature, *Jump, Darling*, that saw Connell achieve his filmmaking dreams and marked him as a Canadian director to watch. Written and directed by Connell, the film starred Hollywood legend Cloris Leachman in one of her final films and last leading role.

Leachman, who died in January 2021 at 94, was quite frail at the time of shooting in Prince Edward County, Ont. Connell vividly remembers her gingerly making her way onto the set with the help of her daughter. But when the cameras rolled, she was able to summon the skill that earned her eight Primetime Emmy Awards and the 1972 Academy Award for Best Supporting Actress for *The Last Picture Show*.

"When you would call 'Action,' it was like a muscle and she would kind of rise up," recalls Connell. "And suddenly someone who spoke very quietly



Top photo: Phil Connell with Cloris Leachman, who starred in *Jump, Darling*, a film that he wrote and directed. Bottom: Connell (centre) on the set of the movie, shot in Prince Edward County, Ont.

...and didn't seem to have a lot of strength would scream at the top of her lungs or run across the room if you needed her to. She saved all her energy for the work, and she clearly just loved to do it." How Leachman carried herself on set would prove highly inspirational for people decades younger, many of whom were working on their first or second film, says Connell. "It was very cool."

So the story begins

Growing up in Oakville, Ont., Connell had no inkling that filmmaking was in his future. But while in Commerce he befriended some people in the DAN School of Drama and Music. That eventually led him to produce a Queen's Players show. Even after entering the professional world

“I was never really ready to give up the dream... I just kind of hadn’t figured out how to make it happen”

– Phil Connell

just as the initial dot.com boom was ending, he was still moonlighting as a theatre producer. “I just kind of caught the bug,” he says. “You’re in high school and you kind of throw a dart at the board and say ‘Hey, I’m going to do this,’ and then you get out into the world and realize there are a lot of possibilities and that you maybe had some tunnel vision as you were going through high school and university.”

Connell’s early business career saw him find success with a company that sold digital advertising inventory across a network of Canadian and U.S. websites. But he’d regularly spend his nights on IMDb, the online film and television database, researching how old some of his favourite directors were when they released their first film. “I was never really ready to give up the dream,” he says. “I just kind of hadn’t figured out how to make it happen.”

Connell finally decided to fully commit to filmmaking, as a writer and director, in 2011, intending to use commercials as a springboard to his ultimate goal of a feature film. He started writing the script for what would become *Jump, Darling* two years later. It would prove a transformative experience for the young director. *Jump, Darling* is the story of a rookie drag queen who heads to the country after a difficult breakup. There, he finds his grandmother in declining health but desperate to avoid the local nursing home. The character of Margaret (played by Leachman) was inspired by Connell’s grandmother and his conversations with her before she died.

In addition to *Jump, Darling*, Connell has released several short films, including *Kissing Drew*. He now has several projects in various stages of development. “None of them are hurtling towards production,” he says. “I could [provide a date], but it would be made up.” But hey, isn’t that what all the best filmmakers do? ■

COMMUNITY

Getting together

CRAIG O’CONNOR, MMA’20, Artsci’12 became president of the Smith Alumni Analytics & AI Chapter last fall. O’Connor, who is data science manager at Compass Digital in Toronto, tells us what the chapter has been up to.



How did you get involved in this alumni chapter?

I first heard about the chapter by attending a virtual event. It was a panel discussion on building your career in analytics. Afterwards, I sought out additional information about the chapter. I joined in 2021 as mentorship chair.

Tell us about an event you’ve held recently.

We’re particularly proud of our panel at SmithToronto on product management, which welcomed the new Master of Digital Product Management program. We were lucky to have **KATHRYN BROHMAN**, director of the MDPM, moderate, and three engaging speakers shared their experiences in the industry. Our chapter has expanded from Master of Management Analytics and Master of Management in Artificial Intelligence grads to welcome any Smith alumni interested in analytics and AI, and so we were delighted to have alumni attendees from a variety of undergraduate and graduate-level Smith programs.

What kind of mentorship initiatives have you done?

We recently launched our first group mentoring circle focused on people and strategy topics in analytics. Our inaugural group of mentees has a great opportunity to connect with one another and foster a lasting relationship with a mentor in an intimate setting. We’re on track to launch further circles with varied themes shortly. Last year, we also hosted a speed mentoring event, where mentees were able to connect with a series of mentors in a shorter and more informal setting. It was fun, and we’d love to host it regularly.

What are some benefits of attending chapter events?

From my experience as an MMA grad, the program’s relatively short duration and high intensity make it difficult to connect with others outside your section, and there was generally very little contact with other programs. Our events and mentorship offerings are the perfect opportunity to connect with fellow alum and stay up to date with the latest industry trends.

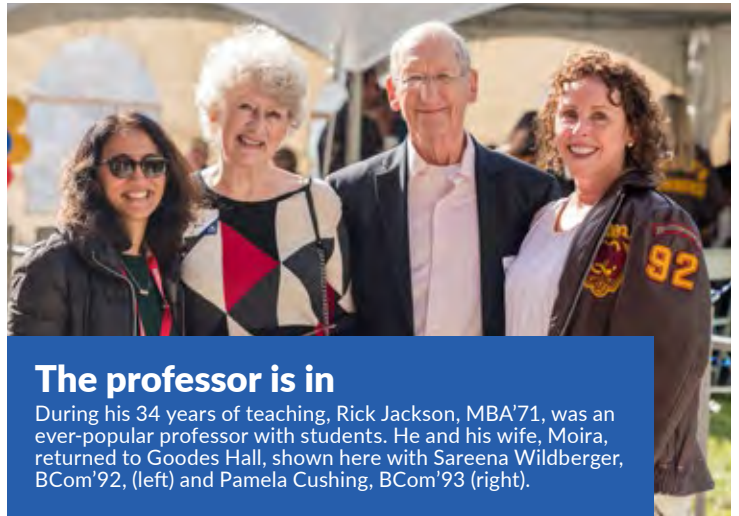
Which other alumni are involved in leading this chapter?

I’m lucky to work with four others on the leadership team: **JULIA MCKEOWN, BCom’18, KELVIN ZHANG, MMA’20, SAMMY STEIMAN, MMA’20, and USMAN JANVEKAR, MMIE’19, MMA’23**. We’ve also benefitted from fantastic support from Smith faculty and staff. There are a variety of paths to getting involved, and we’re always on the lookout for mentors and panellists. SmithConnect.com and our LinkedIn group are the best ways to get in touch. ■

HOMECOMING

Welcome home!

On a sunny weekend in October, Smith alumni came home to Goodes Hall for the first in-person Homecoming celebration in three years. More than 200 alumni, plus students, staff, faculty and guests, got together for a family-friendly charity barbecue that raised money for the local United Way. Alumni from 28 different years and programs reconnected with old friends and classmates.



The professor is in

During his 34 years of teaching, Rick Jackson, MBA'71, was an ever-popular professor with students. He and his wife, Moira, returned to Goodes Hall, shown here with Sareena Wildberger, BCom'92, (left) and Pamela Cushing, BCom'93 (right).



It was 30 years ago today

The Commerce class of '92 returned to celebrate their reunion in style. From left: Corry Bazley (also Artsci'93), Kristina Pearce, Marleen McMaster, Cynthia Schyff, Juliet Jacobs and Erika Boone.





Having a Goodes time

Raymond Souch, BCom'52, paid a visit to Goodes Hall and celebrated 70 years since his graduation.



Let's do this!

Stephen Smith, BSc(Eng)'72, LLD'17, and Dean Wanda Costen with some of the Commerce Society student volunteers who helped make Homecoming 2022 a big success.



Time to celebrate

A group of alumni were all smiles having their photo taken with Professor Wei Wang, PhD'06 (centre).

Here comes Homecoming 2023

Are you a graduate of a year ending in 3 or 8? Mark the dates for this year's Homecoming: **October 20-22**

For more info, contact Smith Development & Alumni Engagement: smithalumni@queensu.ca



Alumni Notes

1970s

PETER MERCHANT, BCom'76, is now chief dream officer at Destination M, a not-for-profit luxury real estate co-op based in Calgary, but with properties all over the world.

1980s

GORDON WHITTAKER, BCom'86, joined Screen Nova Scotia in June 2022, where he is leading the organization's film and television studio project—a more than \$30-million initiative to build the first-ever purpose-built sound stage for the province's growing screen-based industry.

WILLIAM COOK, MBA'87, has written a book reflecting on his time spent as a pilot in the Canadian Armed Forces. A semi-autobiographical story, *Leadership, Loyalty, and Liability* would be of interest to readers with experience in the Canadian military, those considering a military career or people interested in aviation, he says.

LAURA JO GUNTER, MBA'88, was the recipient of the Queen Elizabeth II Platinum Jubilee Medal (Alberta). She was awarded the medal in June 2022 for her contributions and service to the province. Laura is president and CEO of the Northern Alberta Institute of Technology and previously served three years as president and CEO of Bow Valley College in Calgary.



KAYLA KINGDON-BEBB, BCom'07, Artsci'07, has been appointed CEO of the World Wildlife Fund in New Zealand. Her appointment comes after serving as the director of policy for New Zealand's Department of Conservation. Kayla obtained her master's and PhD in land economy after her time at Queen's and is an expert in treaty law, Indigenous customary law and legal pluralism as it relates to natural resource management policy.

1990s

SEAN CABLE, BCom'94, has been appointed chief accountant at PricewaterhouseCoopers. He leads PwC Canada's accounting consulting services group, providing technical advice on complex accounting and financial reporting matters.

BARRY WRIGHT, PhD'99, MA'89, has been appointed dean of Goodman School of Business at Brock University. Barry, who has been a faculty member at Goodman since 2003, had been interim dean since last July. An associate professor of organizational behaviour, Barry previously served as associate dean of undergraduate programs and accreditation at Goodman, as well as interim dean between 2015 and 2017.

KARIM NASSAR, MBA'07, says his career journey has taken him to Paris, Calgary, New York and Toronto since graduation. Currently, he lives in the Toronto area with his wife Yasmine (pictured) and two daughters. He has spent the last four years helping to build Canada's largest digital pharmacy, Mednow.

2000s

DEBORAH DE LANGE, MBA'01, was recently recognized with a WiRE (Women in Renewable Energy) sponsored award. Deborah, who is an associate professor of global management studies at Toronto Metropolitan University's Ted Rogers School of Management, was one of 100 women selected for the Women in Energy Transformation Series, a collaborative effort between Pembina, Globe Series and WiRE to celebrate women who are helping to lead Canada towards a clean economy. Deborah has written three books: *Power and Influence: The Embeddedness of Nations*; *Research Companion to Green International Management*; and *Cliques and Capitalism: A Modern Networked Theory of the Firm*.

JOANNE SALLAY, BCom'04, was one of 20 women business owners in the U.S. and Canada selected for the EY Entrepreneurial Winning Women North America Class of 2022. EY created the program 15 years ago to recognize entrepreneurs who have demonstrated "exceptional business acumen, unflinching determination and innovation in designing solutions." Joanne is president and CEO of Teachers on Call, which offers online and in-person tutoring for elementary and high school students in Ontario and across Canada.

KAZ NEJATIAN, BCom'05, was promoted to chief operating officer at Shopify in fall 2022. He had been the company's vice-president of product, a title he retains. Kaz started his career as a lawyer before co-founding Kash, a payment technology company that he later sold. He says his role at Shopify is the culmination of a lifetime interest in entrepreneurship, finance and technology. (He adds that his mother runs her own business on Shopify.) Kaz is proudly married to bestselling author Candice Malcolm. They have three children: Jasper (4), Georgia (2) and Juno (6 months).

JI YOON, AMBA'08, has been appointed president and CEO of Canstar Restorations in Vancouver. "In my spare time, I run the local GTR car club, hosting local events and charity events for the BC Children's Hospital toy drive," he says.

CHESSA JOPE, BCom'09, has been named a CPA Ontario 2022 Emerging Leader, an award that recognizes distinguished younger members of CPA Ontario who are socially responsible leaders and innovators, already making notable contributions with significant impact. A finance director with Ontario Power Generation, Chessa played a role in the recent acquisitions of hydropower and gas facilities in the U.S. and Canada as well as the development of Ontario Power's climate-related financial disclosures and climate change plan. She serves as vice-chair of Electricity Canada's finance and accounting committee and volunteers her time with CPA Ontario as a mentor and panel member for the capstone program. She is also a Queen's University councillor.





A smashing good time

CORRINE LUXON, BCom'10, tells us she's been working for Red Light Management and the Smashing Pumpkins as the band's head of social media, merchandise and archival vinyl. Last year, Corrine (left in photo above) joined the band at over 40 shows, documenting the tour and assisting with its VIP program. "I was recently on Billy Corgan's podcast discussing my role and how I got my start at Queen's University."

2010s

SHAWN GOOD, EMBA'12, has been appointed president, CEO and head coach of Libro Credit Union. Shawn, who is currently CEO at SaskCentral in Saskatchewan, begins his new role with the Ontario-based company in May.

KENZIE MCNEIL, MIB'13, has started a new role as manager of financial

policy at Halifax Regional Municipality. He is also a corporate officer at Wholetherapy, a specialized psychotherapy practice owned by his wife, Emily Bushell. They married in 2021.

JESSICA WESHLER, BCom'13, MMA'17, is excited to share that she's launched a business venture that supports moms on their pregnancy journey. Check out Bloom Mama Consultancy on Instagram. Jessica lives in Toronto with her husband, David, and 14-month-old,

Sam, and is the marketplace promotions manager at Achievers.

AGNES WIETRZYNSKI, AMBA'13, was named to the "40 Under 40 in Canadian Construction" by *On-Site* magazine in January. Agnes is the president and CEO of QM Environmental. She was chosen to run the environmental and industrial services company last year by Wes Hall, LLD'22, one of the Dragons on CBC's *Dragons' Den*. The 40 Under 40 recognizes young leaders in the construction industry. Agnes

aims to more than double the size of QM and sits on the Ontario Environment Industry Association board.

BHAIRAV MEHTA, EMBAA'14, has joined Amazon as its director of data science AI/machine learning and trustworthy shopping experience. He also continues to manage his startup, Erudition Inc., which he founded in 2014. "I travelled to over 12 countries in 2019-2022 to grow my startup and give keynote speeches at leading global technical conferences and symposiums." Bhairav lives in San Jose, Calif., and has a daughter, Arya, who recently started third grade.

DIANA PITASSI-LANZILLOTTA, AMBA'14, is now orchestrating the distribution strategy for fintech startup Clip Money, following 15 years in commercial real estate. Diana writes, "My entire career in CRE groomed me to 'sprint for Clip'" and accelerate the integration of its business banking solutions into premier shopping centres, postal, convenience, big box retail and various other channels in Canada and the U.S. "Being a mom, wife and professional has been extremely rewarding and I am grateful for the amazing relationships and connections I developed from my memorable time at Queen's," Diana adds.

MATHEW DUFFY, MMA'15, tells us he recently left a chief digital officer role to co-found a data analytics, engineering and cloud services firm called Data Elephant. The company works with organizations of all sizes to mature

their analytics and data-driven decision-making capabilities. “My MMA career opportunities and network were foundational to my success in starting my own business in Canada,” he writes.

JOJO HUANG, MIB’16, tells us she earned her CFP designation and passed the CFA level II exam in 2022. She rewarded herself with a trip to Veradero, Cuba. “For the first time, I tried scuba diving, which was an amazing experience underneath the water.”

PATRICK MACHACEK, EMBA’16, has joined Red Deer Polytechnic as vice-president of development and partnerships. Prior to this, Patrick was vice-president of development and strategy at Olds College of Agriculture and Technology.

JOHNNIE VU, AMBA’16, was recently recognized with the RBC Global Citizen Award, which recognizes top RBC employees for their significant contributions to the community. Johnnie, who is a regional enablement coach for the bank in Toronto, works with Ascend Canada, a non-profit that helps Pan-Asian professionals. He’s also involved with the Royal Canadian Army Cadets.

ANNE FERGUSSON, GDB’17, BSc(Eng)’17, won a silver medal in sitting volleyball at the women’s world championship in November 2022 in Sarajevo, Bosnia and Herzegovina. The Canadian team lost to Brazil in five sets (3-2) in the gold medal game. It was Canada’s first-ever trip to the podium in the sport. ›

Smith Remembers



Professor Emeritus **TED NEAVE** died on Feb. 6 at Kingston General Hospital. He was 88. Ted joined the business school in 1971 as an associate professor, retiring in 2005. In 2009,

Ted was inducted into Smith’s Faculty Hall of Fame. In 2014, shortly after his wife passed away, he established the Elizabeth Neave Fellowship for MSc students to support research that fosters social progress. Ted is survived by his two children and three grandchildren. In an email to the school, daughter Barb noted that “Queen’s was a huge part of Ted’s life for over 40 years, and I can confidently say that he loved belonging to Queen’s.”

HERBERT WYMAN, BCom’50, died on Dec. 23, 2022 following a lengthy battle with dementia. He was 93. After graduating, Bert went on to study law at Dalhousie University. He was in the COTC Royal Canadian Artillery throughout his university years and served with the South Alberta Light Horse reserve regiment after completing his studies, achieving the rank of major. He enjoyed a more than 50-year career as a corporate lawyer with what has grown to become Bennett Jones LLP. Bert is survived by his three children, six grandchildren, two step-grandchildren and one great-grandchild.

DOUGLAS TIGERT, BCom’61, died Oct. 19, 2022. He was 84. Doug had a long, distinguished career in academia and as a private-sector marketing consultant. He taught marketing in both the U.S. and Canada and served as dean of the business school at the University of Toronto from 1980 to 1985. He was a member of Rotary International and enjoyed sailing with his two daughters, including **SANDRA KONSTADINIDIS, BCom’87**. He is survived by both of them and five granddaughters.

GORDON WILSON, MBA’77, BSc(Eng)’73, died surrounded by family at sunset at home on Mississippi Lake in Ontario.

Described as kind, generous and having a gentle spirit, Gord is survived by his wife, Trish, his two children and two grandchildren.

RICHARD BRADEEN, BCom’78, lost his battle with cancer in December 2022. He was 66. After graduating, he embarked on a career with Ernst & Young, Bombardier and Moment Factory. Richard loved spending time with his wife, Barbara Osler, Artsci’79, in Métis-sur-Mer, Que. He was a proud Montrealer and gladly contended for the title of No. 1 fan of the Montreal Canadiens. Richard is survived by Barbara, his three children and one granddaughter.

MICHAEL MORRIS, MBA’90, died on Jan. 16 in Cambridge, Ont. He was 74. Michael was called to the bar in 1978 and spent his career practising law. In the middle of his career, Michael began teaching at the University of New Brunswick. More recently, he taught at Conestoga College. Michael loved fly fishing and later in life developed an interest in plants and gardening, helping his wife turn their backyard into an oasis. He is survived by his wife, Cheryl, his daughter and two grandchildren.



MARJORIE PEART, MPA’93, former director of the Commerce program, died on Jan. 6 in Kingston. She was 80. Marjorie joined the business

school in 1995 as associate chair of the Commerce program. She became director in 2000 and served in that role until her retirement in 2004. Marjorie then travelled the world with her husband, Peter, but always came back to her beloved island on Fourteen Island Lake in Verona, Ont. Marjorie was also an avid quilter, chorister, piano player, scrabble, bridge and pickleball player. She is survived by Peter, her three children and five grandchildren.

FOR THE LOVE OF...

What's your passion outside work? What hobbies have you picked up? We asked the Smith alumni community to share their stories.

1. **JOHN WENEK, MBA'88**, has many hobbies but is most passionate about motorcycling and playing guitar. "Responsible motorcycling hyper-stimulates the senses and leaves a rider feeling alive. It's like flying on the ground and is my summer equivalent of downhill skiing." John adds that making good music, alone or with friends, has been a passion for the past three decades. "The science is true: making music leaves you happier and healthier in so many ways . . . when you master a new guitar riff or solo for a particular piece of music, it's like being the maestro at your own rock concert."
2. **BRIAN WILLIAMSON, MBA'90**, has discovered a love of pottery in retirement. "It's cheaper than therapy and makes for great Christmas or birthday presents!" he writes. "I have no artistic talent, but thankfully with a few tricks you can make something that isn't half bad." One of his favourite techniques involves rolling out a piece of clay, laying it over a form, lifting it over his head and dropping it. "Dropping stuff is right in my wheelhouse . . . If you are looking for something to do in your spare time, give pottery a whirl."
3. **MUSTAFA ANSARI, MMIE'19**, says he's started blogging on Instagram for fun, covering things to do, places to eat and events in Toronto and other Canadian cities. "Narcity reposted a video of mine and many brands, such as McCafé, have reposted my content! My page is called @withextrafriess. Follow along on my journey."
4. **KAREN COLE, EMBA'05, Artsci'85**, discovered a new hobby after she moved to Halifax just before the pandemic: familiarizing herself with her new city and province of Nova Scotia. "I have enjoyed spending my free time searching for sea glass, walking the many beaches, golfing and taking in the sights and sounds of this beautiful province with my little teacup poodle, Redford."
5. **SAMANTHA WAGNER, GDB'20, Artsci'20**, tells us she started playing recreational dodgeball after she learned the sport was played down the street from her apartment. "The convenience swayed me, and I quickly fell in love! It's such a high-energy, intense game, even at the rec level and has allowed me to make many new friends while keeping active. I highly recommend it to anyone looking to stay active in a fun and engaging way."



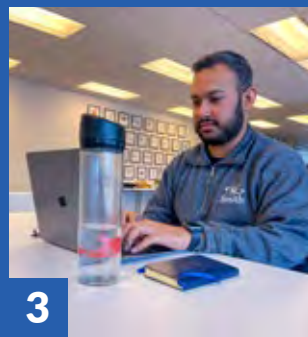
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Turtley awesome!

EMMA MACINTOSH, BCom'16, GDA'16, tells us she and **PATRICK BROWN, BCom'12,** were married in August and have taken sabbaticals from their respective jobs to spend seven months travelling. This particular snapshot was taken while swimming in the coastal area of Moalboal in the Philippines. "We jumped at the opportunity to take some extended time away from work and feel lucky to be travelling with the freedom that we have right now. It's been an incredible experience. Needless to say, it will be hard to go back!"



Anne was born without a left hand and has played on the national sitting volleyball team since 2013.

KATE MORSINK, BCom'17, was selected by the Environmental Defense Fund for its Climate Corps Fellowship. Kate worked on a plan to develop a sustainable packaging roadmap for Wayfair. Her final recommendation focused on eliminating Styrofoam and plastic and reducing waste and excess packaging from Wayfair's supply chain while moving to use only responsibly sourced

paper and cardboard. For her work on the project, she received an award from the Climate Corps. Kate recently completed her Master of Science in Sustainability Management at Columbia Climate School. In March, she joined Boston Consulting Group's climate and sustainability practice in New York City as a consultant.

CONNOR EMENY, BCom'18, has been named one of the "20 Inspiring Young Alumni in the last 20 years" by his high school alma mater, St. Michael's

College School in Toronto. In March 2020, Connor completed his first Ironman competition (3.8 km swim, 180 km bike ride, 42.2 km run) in New Zealand. Within the next two years he established a world record by becoming the youngest person to finish an Ironman on six continents. He says he is now working to complete a triathlon in Antarctica in January 2024.

JULIA GREIN, GDB'19, CIB'19, Artsci'19, tells us she's relocated to Edmonton and is work-

ing as a medical device clinical applications specialist at Synaptive Medical, which she first joined after completing her biochemistry degree at Queen's and her GDB and CIB at Smith. Her current role sees her providing clinical support for the company's surgical technologies inside and outside the operating room. Julia's looking forward to connecting with Smith alumni in Edmonton and Western Canada.



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Celebrations

Births, engagements, weddings and other reasons to celebrate. Let Smith Magazine know about your special occasion (and share your photos) at smithqueens.com/alumninotes.

1. **HEATHCLIFF LEWIS, MBA'10**, is living in Toronto and has welcomed a third child, Rhys Scarlett Lewis.
2. **GEORGIA (FONG) BALINSKY, BCom'11**, and **AARON BALINSKY, BCom'10, AMBA'18**, welcomed daughter Harper West Balinsky on Jan. 20. The three, and puppy Maribou, live in Toronto, where Georgia is senior director of brand strategy at RBC and Aaron is director of airline partnerships and commercial strategy at Air Canada.
3. **YOAV YOSIPOVICH, AMBA'16**, and his wife Sarah welcomed their first son, Matti David Yosipovich, on July 31, 2022, at Mount Sinai in Toronto.
4. **MELODIE CAMPBELL, BCom'78**, and **MIKE O'CONNELL, BCom'78**, found love during the pandemic, nearly 45 years after meeting in the Commerce program. The pair eloped April 12, 2022 at a drive-thru wedding chapel in Niagara Falls.
5. **BENOÎT HUOT, EMBA'20**, shares that he's welcomed a new member to the family: Leo-Henri, born Aug. 24, 2022. Benoît lives in Montreal and says he's "enjoying parental leave as a family for a few months."
6. **KARISHMA GUPTA, MBA'15**, got married on Feb. 9 at the small hill station of Lonavala in India. Karishma is living in Mumbai and works as the vice-president of strategy at communications agency Ogilvy Mumbai.

2020s

SURYANSHU BHOI, MBA'20, tells us he's living in Toronto and has started a new role at Tim Hortons as senior manager of operational risk. He also had the opportunity to go to Qatar in 2022 for the FIFA World Cup. "I watched 10 games over nine days, including all games played by Canada."

ANIKA CLOUTIER, PhD'20, was honoured with a Teaching Excellence Award from the Faculty of Management at Dalhousie University. Anika is an assistant professor at the Rowe School of Business.

DAVID KIDANE, MFin'20, is living in San Francisco and tells us that he started a new position as vice-president and models portfolio specialist with global asset manager and technology provider BlackRock.

AMANDA LABADIE, MMIE'21, has started a new role as a senior project officer of service culture initiatives within the Service, Innovation, Integration branch of the Canada

Revenue Agency. She lives in Montreal.

UZMA KASHYAP, EMBA'22, tells us she's living in Mississauga and is passionate about motivating others to invest in their learning and education. "I was recently part of a career panel and spoke about how people should carve out time to learn more and expand their reach . . . learn with kids, listen to audio books and take that course that was put on the back burner years ago."

ANUM NAZIR, MMIE'22, Artsci'21, shared with us that she enjoys travelling and volunteering in her community with Rotary International. She lives in Oakville, Ont., and is searching for job opportunities in HR and leadership.

NICHOLAS SCARCELLI, BCom'22, Law'22, tells us he's working for Silicon Valley-based technology company Databook. The job allows him to work remotely from his home in Oakville, Ont., but he did get to see the company's headquarters in Palo Alto, Calif., and visit San Francisco with the company.

Budding Businesses

These Smith alumni are growing their new ventures.



SURINDERJIT KAUR (JEET) BHATTI, MMIE'19, just celebrated the one-year anniversary of her company Fathom4sight. The knowledge-as-a-service (KaaS) solution focused on the fintech space provides access to both an online intelligence platform and strategic foresight advisers who help leaders plan and prepare for the future. fathom4sight.com



Two years ago, **JACKIE RHIND, BCom'13**, and her business partner Christina Witzel, Artsci'12, launched Ovry with the aim of making pregnancy tests more affordable, convenient, discreet and less wasteful. Today, Ovry's reproductive health essentials are sold in over 600 stores in Canada. Jackie, who lives in Revelstoke, B.C. writes, "I'm excited to share that Ovry has been nominated for two awards through Small Business BC: the Premier People's Choice Award and Best Youth Entrepreneur Award." myovry.ca



After 15 years of working in the training industry and experiencing the detrimental effects of the pandemic on socializing and community, **MICHAEL HAMLIN, MMIE'21**, launched Calgary-based EverFlex in 2021. The company aims to connect people to fitness - and each other - through small group training sessions that are organized based on goals and abilities and uses technology to track and integrate health factor data. everflexfitness.com

New job or promotion, recently retired, walked down the aisle, welcomed a baby, made a big move or enjoyed some exciting travels?

Let your classmates (and us!) know what's new. smithqueens.com/alumninotes



STEVEN MACKINNON

EMBA'98

Steve MacKinnon is a political vet. He's advised a former prime minister (Paul Martin) and a premier (New Brunswick's Frank McKenna) and held key roles in the Liberal party. In 2015, he was elected Member of Parliament for Gatineau—and twice re-elected since. Today, he's also chief government whip, which puts him at the centre of parliamentary action. So what's the best part of being an MP? What's his advice for anyone seeking office? These are some of the questions we asked.



Where is your hometown?

I was born and raised in Charlottetown, Prince Edward Island.

When you were growing up, what did you want to be?

Either a touring drummer or commissioner of the NHL.

What was your first job?

I started delivering newspapers in the third grade, but my first real work experience was as a farmhand on my grandfather's dairy and my aunt and uncle's tobacco farms.

What made you run for office?

I had enjoyed formative experiences at the heart of provincial and federal political parties and governments. I felt passionately that the country was on the wrong track under the previous government. I decided that my best contribution to changing that was as a candidate.

What's the best part of being an MP?

Having access to virtually any expert on any issue. MPs can call upon research and information from almost any source. Experts and stakeholders are almost always eager to supply their perspective on an issue with an MP. If you're motivated to learn about an issue, the doors of knowledge are wide open.

What's the toughest part about being an MP?

Keeping your mind open to new information.

Name one thing that has helped you succeed in politics.

My family has been very understanding, and they get involved at important times. Without their help, it would be impossible.

Your career highlight so far is?

I was involved in the government's response to Covid-19, especially on the procurement side. It wasn't perfect, but in many respects it was an historic and effective undertaking which came as close to a war effort as I can imagine. Personally, being named chief government whip was also a great honour, as it is central to the operations of the entire Liberal parliamentary caucus.

What's your advice for someone who wants to run for office?

Make sure those most important to you support you; get your facts straight; believe in yourself; and never stop knocking on doors.

Where's your favourite spot on Parliament Hill?

It's closed now for renovations, but the Library of Parliament is one of the most spectacular rooms in the country.

What's your motto?

If you're going to be a bear, be a grizzly.

Your favourite all-time book?

"To Kill a Mockingbird" and "Les Misérables"—one English, one French.

What are you reading now?

"Slouching Towards Utopia: An Economic History of the Twentieth Century", by Bradford DeLong. It's a tour de force about the last century and how we succeeded, and failed, to progress.

What's your favourite movie of all time?

"12 Angry Men".

What's the best advice you ever got?

Speak only when you have something to say.

What's one thing most people don't know about you?

Like many active politicians, I am an introvert.

What do you do when you're not working?

Reading, running, cycling and attending as many concerts as possible.

What's your idea of perfect happiness?

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