

Focus on Leadership

A SPECIAL SERIES ON CALGARY'S BUSINESS VISIONARIES

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TELUS answers the call for community giving

The awards are starting to pile up and so are the numbers — the first-ever Canadian winner of a global award for Outstanding Philanthropic Corporation, listed in Canada's top 50 for most socially responsible corporation and best corporate citizen, and by the end of this year a jaw-dropping \$245-million in donations will have been distributed to various charitable and not-for-profit organizations.

And that's just in the last decade.

But what these numbers really show is that today TELUS is certainly more than just about telephones.

Management, staff and retirees live and work by the company's philosophy of "we give where we live" and the examples are many, from funding voicemail options for users of Calgary's Drop-in Centre, to supporting community recreation centres, to retirees this summer providing emergency food hampers to Slave Lake residents whose town was all but destroyed by an unexpected wild fire.

"Being socially responsible has really become part of our culture," says Monty Carter, TELUS Enterprise Solutions' senior vice-president. "It's a simple philosophy in that we believe in order to do well in business, we have to give back to the communities where we live, work and serve. We encourage all of our employees and retirees to get involved. Community involvement is also a key attribute we look for in members of our management team."



Wil Andruschak photos

TELUS Enterprise Solutions' senior vice-president Monty Carter.

Since 2000, TELUS employees and retirees have volunteered more than four million hours to charitable causes throughout Alberta and across the country.

One of TELUS' more unique programs is its community boards, the only program of its kind in Canada.

Now in 10 cities across Canada, it's a giving program that targets lesser known charitable organizations by handing the decision making over to a board of local leaders who know their communities best.

"With the boards we try and focus on non-mainstream organizations, the smaller ones that don't have the marketing machines to raise the funds they

need," says Carter.

The boards carry some star-power, in Calgary, for example, Ken King of the Calgary Flames is chairman, while Olympian Kerin Lee-Gartner, Murray Smith, Adam Legge and Bev Longstaff make up the other notable names. Carter is vice-chair.

"Yes, there is some star power, but the decision to include these people on the board is because they are active, engaged and vocal in their community. They bring to the table ideas and names of groups who need assistance that we may have never heard of — it allows us to reach that many more people," he adds.

TELUS is also actively involved

with Calgary Economic Development and its many programs and campaigns to attract businesses to Calgary and promote the city abroad.

"We believe it's important to be a good corporate citizen and getting involved with Action Calgary is one way to do that," says Carter. "We support bringing new businesses and people to Calgary and being involved with this initiative is one more way for us to give back. It's a very important part of our business as we continue to grow — we believe in it."

For more information on TELUS' investments in the community, please visit www.telus.com/community.

Mortgage firm breaks new ground

Mortgage Fund Three is everything not normally associated with a commercial mortgage lender — it's young, innovative, creative and takes a streamlined approach to a traditionally onerous process.

Created in July 2006 by two experienced financiers — Rob Millar and Ronald Mathison — the Calgary-based company has spent the last five years cultivating a refreshing approach to facilitating loan transactions on multi-million dollar commercial mortgage deals anywhere in the country.

Mortgage Fund Three is capitalized by long-term individual investors and risk-averse institutional investors. Its mortgage products are delivered to the borrower through independent licensed originators located throughout Canada.

Normally, commercial mortgage transactions are handled by big banks, life insurance companies or pension funds and in this regard, Mortgage Fund Three is breaking new ground, creating an almost David and Goliath-type of scenario.

"We feel we are offering an innovative approach. We're competing head on with banks and life lenders and we believe we're excellent in what we do — we've developed efficient, fast systems and Calgarians as a group have generated the necessary capital to give us a try," says Mortgage Fund Three president Rob Millar, who has 34 years of experience in the commercial mortgage market.

"We take a streamlined, easy and effective approach that understands the needs of the borrowers."

In this respect, Mortgage Fund Three is a lot like Calgary — unique, vibrant and entrepreneurial.

Now with five years under its belt, Mortgage Fund Three considers its success thus far to come from steady, prudent and conservative money management.

"At the moment, Mortgage Fund Three is for wealthy people who are looking for a stable place to put their money. We're not a place where you get rich, we're more of a vehicle for staying rich," says Millar.

In June, Millar signed on to participate in the Calgary Economic Development's Calgary. Be Part of the Energy campaign, a national marketing initiative aimed at attracting qualified workers and businesses to Calgary.

With the city expected to be one of the key leaders in the country's economic recovery, it is again expecting possible labour shortages. The campaign is designed to nip that possibility in the bud.

"We're happy to be a part of it. Being in this business, you feel the highs and the lows and we've done a lot of research and reporting on the bright side of Calgary when times have been tough," says Millar.

"It's all about speaking proudly of where you are from. Of course we want to continue to attract the best and brightest, we're aligned with the city on that and we want to encourage that."

Expertise, family atmosphere sets Barclay apart

Barclay Street Real Estate Ltd. is out to change how people look at "boutique" companies.

Although the name dates back to only 2004, the company itself has roots in Calgary going back to 1973 and, under the leadership of president David Wallach, it has grown to become a shining light in both the property management and brokerage arenas. Yet, Wallach says, don't expect to see Barclay Street balloon into a giant company with hundreds of employees.

"We are who we are — we're experts in our market and we pride ourselves in that," he says. "Leadership and high professional standards are our core values. The reputation we're getting, and one we're proud of, is that 'boutique' is not small; it means 'expert.'"

"We hope more people recognize that being a boutique means having the right people to care for you, and getting the suit that fits your body — not just something off the rack with

10 other suits."

With offices in Calgary and Edmonton, Barclay Street offers a full-service real estate brokerage focusing primarily on office, retail and industrial space.

Management leading by example, combined with the fostering of a family atmosphere in which its two divisions — brokerage and property management — support and celebrate each other's successes, are ways Barclay Street stands apart from the competition.

"What differentiates us from the others, where we're in our blue ocean where we can swim alone, is we care about the people who work here and, as a result, the people who work here care about our clients," says Wallach. "It's part of my belief being a family man — we're all about family, caring, leadership; core values that come from your gut."

"We did a survey and more than 90 per cent (of clients) say they'll work with us again because we give them some-



David Wallach is president of Barclay Street Real Estate.

thing beyond the deal — it's the caring, following up with that client not only to the signature, but beyond that. We have two mottos: 'Because we care,' and, 'There is no traffic jam on the extra mile.'"

Barclay Street recently joined the TCN Worldwide network, proving you don't need dozens of branch offices and divisions to have international reach.

"TCN is an international group

of companies like us — boutique firms that are local experts in their market, and they refer clients and information to each other, to solve clients' problems around the world," Wallach explains.

TCN is comprised of more than 1,200 members representing independent commercial real estate firms in some 200 markets; Barclay Street is its first Canadian affiliate.

Partner fosters giving-back philosophy at law firm

Burnet, Duckworth & Palmer partner Jim Palmer has earned many prestigious accolades over the course of his career, including the Order of Canada and three honorary law degrees, but it's his award for Unselfish Public Service from his Dalhousie law school that has truly shaped the culture at the prominent Calgary law firm he has helped lead since 1956.

With more than 140 lawyers, BD&P is a full-service law firm serving clients in the energy, business, financial, insurance, technology and real estate sectors, as well as aviation, intellectual property and international commercial arbitration, among other practice areas.

But it's the firm's commitment to the community it serves and its belief that BD&P's respon-

sibility goes beyond providing legal provisions that really sets it apart from the pack, a philosophy that stems directly from Palmer's influence.

"Jim Palmer is certainly the person who has fostered our culture of getting involved and giving back," says managing partner Gary Bugeaud.

"The culture at our firm has developed through our charitable involvement — it is very important to us to be active in our community and to attract staff who value giving back."

The list of charitable organizations BD&P supports is long, with Habitat for Humanity and the Food Bank being among the larger groups to receive support. As proof positive of its commitment, BD&P prominently features both on its website

homepage.

"There is a lot of need out there and we do what we can," said Bugeaud. "Our goal is to maintain a very high level of community involvement — every year, we get involved with a number of new organizations while continuing to support our established ones."

While addressing the issues of homelessness and hunger are two key focuses of BD&P's charitable efforts, many other groups also benefit from the firm's generosity, including women's issues and the arts.

BD&P previously earned the Business in the Arts Award for Most Effective Corporate Program, making it the first law firm in the award's 25-year history to win.

The firm was recognized for its

support of the Alberta Ballet and Youth Singers. And several of its partners serve on boards for organizations such as One Yellow Rabbit and the Epcor Centre for the Performing Arts. It's also the key sponsor of the BD&P World Music Series.

It's this philosophy that makes BD&P's partnership with Action Calgary, the Calgary Economic Development's corporate partnership initiative, a natural fit.

"The reason we decided to partner with Action Calgary is, in part, because Calgary is a vibrant place to live and work and getting the word out is important. It helps to continue to draw entrepreneurial people to the city, something we all see as important and in keeping with the Calgary's spirit," says Bugeaud.

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