



THIS WEEK'S PROGRAM

November 21, 2023

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Programs Andy Dinkin



Craig Field



Lori Keeton



Richard Malnati



Harriett Porter

HIGWIA

How I Got Where I'm At

Featuring members:

Craig Field,

Lori Keeton,

Richard Malnati,

Harriett Porter

by Rick Handford

I will begin by recommending that you follow the directions in the Rotary Reporter to access the video of the presentations, because you don't get the proper feel for the speakers from reading a brief summary, which of necessity is all that can be presented here.

In his own incomparable style, Tony Marciano performed the introductions, beginning with a Godfather-styled presentation about using the Four-Way Test's first dictate to "Tell the truth", as a way to vet the candidates for this day's HIGWIA talks.

First up was **Craig Field**, who was born in Harare, Zimbabwe, and after 16 years of living in what was essentially a war zone, the family passed through Johannesburg, on their way to Capetown, South Africa, where he completed high school. He then went to work for Coopers-Lybrand in Johannesburg, and after five years with that firm he was drafted into the South African military for two years. When he got out, he took the CPA exam and returned to work at Coopers, eventually being able to start his own practice.

Craig met his wife in 1986, had two children, and in 2001 they directly experienced some of the Apartheid violence and began looking for a safer place for the family. They moved the family to Charlotte in 2008, and he was able to secure a no-doc loan to buy a house here. As jobs were few in the great recession of 2008, it took him a couple of years to find a position with a tax practice in Mt. Holly but was limited by the fact that his status as a chartered accountant was not recognized by North Carolina (or most other states), and he was not allowed to sit for the CPA exam. Similarly, his wife's credentials as a registered nurse were not recognized, and she had to study to be able to take a position as an EMT.

Eventually Craig found that he could take the CPA exam in Vermont, and after passing that, he studied for and passed the CFP exam as well. He then found a position running the Charlotte office of a Michigan firm, which gave him some great experience. While the work was good, there was no room for upward mobility, so in 2018 Craig left and started up his own practice. He subsequently met up with Mark Ryan, who also had an accounting practice, and in 2020 the two firms merged. Craig is now managing partner of Ryan, Geer, Field & Rhodes PLLC, a growing firm with six staff based in the Matthews area.

On the personal side, he has a son who has just completed a stint with the 86th Airborne in Fort Bragg, and is now working for ATI in Monroe and a daughter who is a second-year law student at Elon University School of Law. He is happy to be living in Charlotte and being a member of this club.

Next up was **Harriet Porter**, a Senior Capital and Transformation Leader with robust experience ranging from management across the HR continuum to leadership of organizational transformation for global initiatives. She walked us through a dizzying sequence of universities and companies that make up her experience.

Harriet's education included being one of 40 students in the southeast chosen for the Capstone Seminar program at the University of Alabama between her junior and senior years of high school, after which she returned to the University of Alabama to work on her bachelor's degree. One year in, she had to leave school and return to Birmingham to help her mother with a serious illness.

She worked in retail with Circus World for four years, quickly rising to the level of store manager, subsequently being moved to different troubled stores, and bringing them up to standards, including a stint as a mystery shopper seeking out (and finding) the sources of shrinkage problems at various stores. She then moved to a larger position with a Japanese company named Sanrio, which created and owns the licensing rights to the iconic "Hello Kitty" character/brand. While working at Sanrio, she met her husband, who happened to work for KB Toys, the main competitor of Circus World.

Shortly after her marriage, she was able to return to school, and was taking classes at Alabama and at Alabama Birmingham at the same time—three days in Tuscaloosa and two days in Birmingham. She then went to work for IBM, managing PC sales to the college and K-12 markets. After about four years with IBM, she and her husband moved to Michigan and earned their MBAs, after which they both went to work for US Bank.

US Bank was acquired by Firststar Bank, and she and her husband were released to industry in the staff consolidation, each with a separation package that would carry them for a year. She took advantage of that and used her year to complete her PhD course work.

Subsequently, she went to work for Piper Jaffray as a Vice President, but once more found herself let go in a spin-off of Piper Jaffray from UBS. At this point, being tired of being downsized, rightsized, and spun about, she founded Porter and Associates, LLC, and ran it from 2004 to 2013, consulting on HR and leadership issues.

She was then recruited away by Price Waterhouse Coopers (rebranded as PwC) and worked on their transformation/reorganization group. Two years later, leadership was changed, and her department was deleted in the reorganization. She then went to work for KPMG in Chicago but found that it was too far from family and not where she wanted to be, so she left KPMG, returned to Charlotte, and took a job with Deloitte. In 2020, there was a Covid-related downsizing, leaving her unemployed again.

She went to work for TCS (TATA Consulting Services), a global company with 610,000 employees that had never had a layoff, figuring that this would be it, but in August of this year, they had their first global layoff, leaving her unemployed again.

She is now deciding what to do—go to work for another big corporation, join a small local company, or restart her own company. With an undergraduate degree in marketing and international business, and a master's in strategic business, she is quite versatile.

She has a 27-year-old son with a lovely girlfriend and a \$1,800 cat named Freaky Dickie who she will meet in December.

Tony next introduced [Lori Keeton](#), who owns her own law firm and specializes in Civil Litigation and Mediation Services. She has been named one of the *50 Most Influential Women* by the *Mecklenburg Times* and recognized as a *Leader in the Law* by *North Carolina Lawyer's Weekly*.

While Lori is a new member of our club, she is not new to Charlotte, having moved here in 1998. She grew up in Jackson, Mississippi, where her single mother worked as an English teacher by day and in retail at night to support the family. When she was 13, her stepfather entered the picture. He was a Judge Advocate General and dean of the City College School of Law. Her mother told people from a very early age that she would be a lawyer, and when asked how she knew, she would tell the story of Lori and her letter to the Tooth Fairy, in which she respectfully requested a game in addition to the customary one dollar in exchange for her tooth. If this was not enough, she would tell the story of the *Get Him System*, a product advertised in the local newspaper that guaranteed a new boyfriend in ten days. She and her friend were so excited that in addition to coming up with the ten dollars needed to purchase the system, they ponied up an additional two dollars for the rush shipping! When neither she nor her friend had acquired a boyfriend in the promised ten days, The outraged Lori sent a letter accusing them of negligence and demanding return of the full \$12, because not only did the product not work, but it had also been delivered three days later than the promised rush delivery. Needless to say, she received a check for the \$12.

She has turned this talent for persuasion into a career representing municipalities and their employees, especially first responders. Lori worked for a small law firm, and then a large firm, and then started her own practice in 2017. Her practice was quite successful, and in 2020 she was preparing to argue a major case before the Fourth Circuit Court of Appeals (one level below the US Supreme Court). The day before she was scheduled to appear, she got a call from her doctor saying that she had cancer. So, in true Lori fashion, she called her family together and told them two things. Number 1, she had cancer. Number 2, she was arguing the case in front of the Fourth Circuit tomorrow, and so further discussion about the cancer would have to wait until the following day.

This was during the height of the Covid situation, and hospitals were allowing at most one family member to go with her for doctor visits and treatments, and sometimes not anyone. But she had a number of friends that insisted on coming with her on doctor and hospital visits, even if they had to wait in the car. She named them her 'garage friends' because they would wait in the parking garage until she was ready to go home. During that time, she also received a poem with a handwritten note from someone named Don Payne, a cancer survivor living 640 miles away and who she had never met. He included her in his Chemo Club, and sent her supportive notes, cards, and gifts almost every day throughout her treatments. He had been doing this for people going through chemotherapy since he completed his own regimen 20 years before.

She has now been in “No Evidence of Disease” status for three years and won the case that she had argued in the Fourth Circuit. So that is how she got where she is—God, hard work and resilience, her family and friends, and the kindness of strangers.

Last but not least, Tony introduced **Richard Malnati**, a corporate business coach/mediator who founded and runs Richard J. Malnati, LLC. Richard has a 20-year history of working in mental health. He decided to talk about ‘How he got where he is at *in Rotary*’.

Richard was invited into Rotary by former District Governor Paul J Helms, after whom the road to the Monroe Airport is named. Paul introduced Richard to **Mark Markanda**, who promptly declared him to be a philanthropist, and then asked him to provide \$1,000 to help someone in need. Boom! A new Paul Harris Fellow! Richard feels that we need to pay attention to the Objectives of Rotary in addition to the Four-way Test. He showed a slide that listed all four of them, but only spoke of the first one, developing acquaintances as a way to better serve others.

He has met many members of the Greatest Generation through Rotary, including Dick Payne and Jim Whittington, and also Dick Frosch, who had been drafted into service on the other team during WW II, and is now a great American Patriot and friends with many of those he was shooting at during those times.

In the middle of his life Richard found himself to be a single parent and in graduate school and dropped out of Rotary to focus on his other priorities, but he never forgot the people or the principles of Rotary.

John Shell invited Richard back to Rotary as a member of our club. This year he decided to take a motor trip up north and was very intentional about visiting other Rotary Clubs along the way, listing many and getting to five. He first visited a tiny club in New Hampshire that served a \$5 lunch, and heard a speaker named Anita who has a mission in Zambia helping women learn basic skills and Christianity. Her husband was killed in a plane crash, and rather than coming home, she elected to continue her mission. About 18 months later she fell ill, and urgently required an unusual and difficult surgery. A surgeon in this tiny Rotary club flew to Zambia and performed the surgery there.

Other clubs visited included Niagara Falls, Canada, where he learned about an organization that provides service dogs that help veterans and first responders suffering from PTSD to be able to sleep; Utica, New York, where the Stanley Theatre has a stairway fashioned after the grand stairway on the Titanic, the Rotary Club of Toms River New Jersey; Cooperstown, New York, which has a lot more to it than baseball; and Holland, Michigan, where he had an interesting experience involving a boat trip and an encounter with a sheriff.

Richard strongly urges everyone to visit other clubs and make new acquaintances in service, and I strongly urge you to hear his fascinating stories about the clubs he visited and the people he met on his visits by watching the video of his talk at the link in the Rotary Reporter.

A recording of the meeting can be found here: <https://vimeo.com/887008752>
The speaker's introduction begins at approximately 12:50 minutes.