



Photo courtesy Tourism Kelowna

ANNUAL REPORT | 2017



Helping grow the **PEOPLE**
who **POWER** Kelowna



OUR PRESIDENT | TOM DYAS

It's hard for me to believe that I first joined our chamber more than twenty years ago, in 1995, when Kelowna's population was about 85,000. No skating rink; no Rotary Centre for the Arts; angle parking on Bernard – it only took ten minutes to drive Harvey from one end to the other. Our city has come a long way, and so has our chamber.

In March of 2016, seven years after joining the Kelowna Chamber of Commerce board, I began the first of two terms as president. The to-do list was long. Our board knew we had to work on becoming stronger and more efficient so that our members could count on us to advocate for them as the voice of business in the central Okanagan.

We needed to do the hard work of policy-making and lobbying government as well as the purposeful but certainly enjoyable work of networking, celebrating achievements and learning our membership's needs. And we needed a new governance structure, strategic direction, and the team to help execute our objectives and ensure the smooth operations of the day-to-day.

In my two years, we also had to demonstrate leadership and advocacy on timely and critical issues such as last fall's proposed federal legislation on small business tax, reducing property transfer taxes, the inter-provincial trade disputes around wine and spirits, the invasive mussels threat, and more.

Thanks to the countless, countless hours of two dedicated, tremendous boards and various committees, here we are in 2018. We've got a vision and plans to take us forward. We have an advocacy platform and results. We have talented staff, including our new executive director, Dan Rogers. And we have nearly 1,300 of you who invest in us because we are delivering value and fulfilling our mission of connecting, serving and empowering the Kelowna business community.

It is with great pride and need for sleep that I pass on the torch to your incoming president Carmen Sparg, and look forward to serving our membership another year: this time as past president.

TOM DYAS, PRESIDENT | TD BENEFITS



PRESIDENT-ELECT | CARMEN SPARG

Over the last eight years serving on the Kelowna Chamber of Commerce board, I've discovered how meaningful our work is – from helping improve our economy to hearing first-hand what's on your mind. As the incoming president, I look forward to another year of rewarding and important work. Based on the start to 2018, I anticipate another active advocacy year.

Ensuring our board's work is relevant and in line with the forward-thinking efforts of the BC and Canadian chambers is a critical part of fulfilling our mission to support members and foster an environment where business

thrives.

Of course, the day-to-day of running of a vibrant business is key as well, and I look forward to networking with you and taking notes alongside you as we discuss topics such as disruptive technology and crypto currency. Our team has done an incredible job of planning outstanding programs and events at which we can network, learn and celebrate this year. Let's make 2018/2019 another fantastic year to be a member of the Kelowna chamber!

CARMEN SPARG: PRESIDENT | SILVER LINING MANAGEMENT CONSULTING INC.



PAST PRESIDENT | KEN CARMICHAEL

Over the years I've truly enjoyed meeting a fantastic variety of people who have all had Kelowna top of mind. The City; our great members: it has been fantastic to meet and get to work with them. Being able to have our opinions listened to and valued has been wonderful. Also: the awesome people at the Chamber: current and past board members and staff. I look forward to being an active member of the Chamber. I'm sure I'll stay involved for years to come. To everyone else: Get involved!

- **Ken Carmichael, Partner | BDO Kelowna**



EXECUTIVE DIRECTOR | DAN ROGERS

Since joining the Kelowna Chamber of Commerce in June of last year I've been proud to witness the chamber's growth in so many vital ways. Perhaps the best example of that growth was our advocacy leadership that was clearly on display in September when the city hosted the Federal Liberal Caucus just as the discussion over the proposed corporate tax policy was heating up. There is no doubt our efforts, in conjunction with the efforts of our colleagues from across the country, had a significant impact influencing the federal government to change course. It is a great example of how strong and important the chamber network is.

I was privileged to join President Tom Dyas at the BC Chamber AGM in Victoria and then to carry the Kelowna flag at the Canadian Chamber AGM in Fredericton, NB, last fall. The cornerstone of both events was the policy debates and I was pleased to see all our policies get the support of our colleagues.

In addition to hosting our signature events – the Business Excellence Awards, our Luncheon Dialogue Series and our Annual Chamber Golf Tourney, 2017 also saw us salute some of the community's strongest leaders as we celebrated all the recipients in the Top Forty over 40 program.

I also could not be more proud of the team that works so hard on your behalf. From our longest serving member of our team (Dicky) to our newest (Jonelle), there is no doubt we couldn't achieve the success we have without a dedicated and passionate staff. Their pictures are shown later in this report but if you happen to see them around make sure you tell them how much you appreciate the work they do on your behalf! The same goes for our many chamber ambassadors.

We are extremely fortunate to have such a dedicated team of volunteers who believe in the chamber and the Kelowna business community. It is an honour to work alongside such a dedicated board, wonderful volunteers and exceptional staff. I look forward to continued growth for the chamber and the City of Kelowna in the years to come.



Policy Debate -2017 Canadian Chamber
AGM Fredericton, New Brunswick

A handwritten signature in black ink, appearing to read 'Dan' with a stylized flourish.



Business Excellence Awards 2017

ABOUT YOUR CHAMBER

We've represented business interests through advocacy and education, networking and benefits for 112 years. As a fully accredited Chamber – with distinction – the Kelowna Chamber acts as a powerful voice for our 1225+ members and their 25,000+ employees to promote local business interests. The Chamber's mission is to foster a positive business environment by providing our members with leadership, advocacy and services of value.



Being a Member of the Kelowna Chamber of Commerce keeps us connected with business leaders while providing meaningful input that shapes positive government policy that's good for business and the community.

MAX & ANNA CARBONE
CENTURY 21 ASSURANCE REALTY | PARTNERS



Members & Guests sip the wine at Vibrant Vine Commerce Connex



THE CHAMBER IS IN THE ADVOCACY BUSINESS

Much of the work that Chambers do is advocating on behalf of members. In 2017, 40% of the policies submitted to the Canadian Chamber AGM for consideration and implementation came from British Columbia – which only represents 13% of Canada’s Chambers. That’s a mighty number, and accurately reflects our integral role of finding out “what’s on our members’ minds” and kicking it upstairs to government. The provincial government response book to Chamber policies in 2017 ran to a hefty 64 pages. This communication, interaction, and management of issues really counts. Cutting red tape. Getting fairness in business practices and creating a positive policy environment to help businesses succeed and communities to prosper.

In 2017, we submitted policies to the BC Chamber on:

- Rent Control;
- Competitive Tax Environment for Credit Unions (another win);
- Moving Forward with the Strong Business Case for a South Okanagan Similkameen National Park; and
- Providing Certainty for Business through the Timely Administration of Justice.

We also got support from our colleagues across the country at the Canadian Chamber for our policy that calls on the Federal Government to do more to help the Province of BC and local jurisdictions in the fight to limit the spread of invasive mussels. Our efforts, alongside those of local, provincial and federal government representatives, and other Chambers, meant we saw the setting up of 24-hour border check stations, additional conservation officers, and even a mussel-sniffing dog named Kilo (see photo right).

We work locally with members, as well, helping on issues just down the street, working with local government and non-government organizations, as we foster a positive business environment. In 2018 we will be submitting even more policies provincially and nationally.





President Tom Dyas tells BC Premier John Horgan what's on the mind of businesses in the Okanagan at a BC Chamber event in Vancouver in November 2017.



Tom Dyas had a chance to speak directly with Canada's Finance Minister Bill Morneau in September 2017 when the federal Liberal caucus met in Kelowna.



Tom Dyas, President of Kelowna Chamber of Commerce engages BC Premier Christy Clark in February 2017 as she reviews Budget 2017 in Kelowna at a sold-out member luncheon

Working in collaboration with our local, provincial and national partners.



THE CANADIAN
CHAMBER
OF COMMERCE

PROVIDING SERVICES – CELEBRATING EXCELLENCE



Top 40 Over 40 Awards: June 2017



Business Excellence Awards: October 2017

Business Excellence Awards 2017

Business Leader: Lane Merrifield | Wheelhouse Ventures

Young Entrepreneur: Andrew Gaucher | GGroup & Catalyst Land Development

Arts Achievement: Rotary Centre for the Arts

Marketing Campaign: CREW Marketing Partners

Excellence in Agriculture: BC Tree Fruits Cooperative

Social Impact: Volinspire

Rising Star: Current Taxi

Large Business: Northside Industries

Mid-Size Business: NewCap Radio

Small Business: Hybrid Elevator Inc.

2017 Top Forty Over 40

Theresa Arsenault
 Andre Blanleil
 Dave Bond
 Joan Bottorff
 Kathy Butler
 Mike Chisholm
 Luanne Chore
 Karen Christiansen
 Paul Clark
 Maxine DeHart

Cori Derrickson
 Laurel Douglas
 Kevin Edgecombe
 Doug Findlater
 Mike Gawliuk
 Raghwa Gopal
 Corie Griffiths
 Bruce Hamilton
 Paul Hergott
 Al Hildebrandt

Mike Jacobs
 Susan Knight
 Mark Krehel
 Angie Lohr
 David MacLean
 Doug Manning
 Phred Martin
 Kyleen Myra
 David MacLean
 Devin Rubadeau

Nicole Rustad
 Kelly Sherman
 Marilyn Strong
 Richard Takai
 Janice Taylor
 Laura Thurnheer
 Stewart Turcotte
 Wade Webb
 Noel Wentworth
 Mandy Wong



ConnEXPO Fall 2017



Silver Star Ski Day January 2017



32nd Annual Chamber Golf Tournament at the Harvest

INCREASING DIALOGUE – SPEAKER SERIES & MORE

With our partners at the Okanagan School of Business, we bring nine outstanding keynote speakers – and sometimes more – to our members and non-member luncheon guests each season. The support of the Okanagan School of Business is critical to our success; more importantly, at every luncheon they bring our audience vital updates on the rapid changes and growth at the School, whether it is in trades training, the growing emphasis on wine education, culinary expansion, the critical

partnerships they have set up with the airline industry, ENACTUS – there is always new and exciting information to share, and celebrate.



State of the City Luncheon 2017

Other components of our education for members programs include our monthly “Business Smarts” workshops, where members learn from other members, and the weekly Sales Lead

Network, where members

meet over breakfast with other members to share referrals, updates, and take in a presentation from a different member each week. Two separate groups meet weekly.

And of course, every month, a Chamber member hosts the always-popular Commerce ConneX – several hundred members descend on a member business for networking, appies, beverages, and a chance to chew over all things Chamber. Thanks to all our gracious hosts in 2017!



BC Premier Luncheon Budget 2017

Our electronic communications fill in any gaps – bi-weekly eNewsletters, and updates on issues of critical importance from our Advocacy team at the BC and Canadian Chambers. A well-rounded experience for all our members and subscribers.

SUCCESS THROUGH TEAM WORK



2017-2018 BOARD OF DIRECTORS

(Back Row L-R): Stuart Grant, Norelco Cabinets Ltd.; Graham Moir, Appointee Kelowna Jaycees; Andrew Ingenhorst, Grant Thornton LLP; Dr. Barry McGillivray, Appointee Okanagan School of Business; Ken Carmichael Past President, BDO Canada LLP; Jeff Robinson Vice-President, Rush Ihas Hardwick LLP; Al Hildebrandt, Kelowna Foundation for Hope & Social Innovation; Shelagh Turner, Canadian Mental Health Association; Domenic Rampone, West Manufacturing Ltd.; Marek Buryska, Valley First Credit Union; Ron Cannan, Interior Savings Credit Union; **(Front Row L-R)** Nikki Csek, Csek Creative; Una Gabie Vice-President, Touchstone Law Group; Tom Dyas President, TD Benefits; Carmen Sparg Executive Vice-President, Silver Lining Management Consulting Inc.; Angela Nagy, GreenStep Solutions Inc.; (Missing from photo: Martine Hickman Vice-President, Business Development Bank of Canada; Tracy Gray, Appointee City of Kelowna)

COMMITTEES OF THE BOARD | UPDATES

Member Care Committee

This plugged-in group of business owners represents the interests of our members in monitoring benefits and outward-focused marketing. The Committee is involved in observing membership sales as well as reviewing member events and programs in order to provide insights and observations for the operations team.

Governance Committee

By-laws and policy manuals, reviews and revisions: 2017 was a year of revisiting and revising to better meet the challenges ahead. The major focus of the committee has been on the proposed bylaws revisions.

Policy Advisory Committee

Always a busy group, in 2017 this committee provided leadership in identifying and taking action on local, provincial and federal issues of specific interest to members and key stakeholders of the Chamber and of concern to the business community at large. The Committee also hosted a Policy Forum in October 2017 to workshop issues of interest to members.

Finance Committee

The Committee has been reviewing monthly financial statements to monitor the overall health of the organization. The Committee has also been working on a number of draft policies related to managing the chamber's reserves to ensure there is adequate funding in place for such things as equipment replacement and business continuity in case there is a major disruption of operations. As noted later in the financial report, a major leak in the roof was spotted early in 2017 and as a result a major replacement of the roof is required and will be financed by reserves in 2018.

Building Committee

This group has been overseeing the transition of Tourism to their new info centre which is now planned to take place in early July. That means the chamber is pursuing a new tenant for the space. Leasehold improvements are expected and depending on the needs of the new tenant some interior renovations may be required in 2018. The committee is also exploring long term opportunities for the chamber at its current site. The building is owned by the chamber but is quite old and a variety of options are being considered by the committee. The current lease on the property is with the city and is in effect for another nine years.

CHAMBER AMBASSADORS

Our team of volunteer Chamber Ambassadors share their enthusiasm and knowledge with warm welcomes for our new members. They meet & greet new members at their businesses, assist at events, and organize the annual events like our Commerce ConneXpo. Not only do they expand the reach of the Chamber, they benefit by increasing their personal connections with our newest members.

A **BIG THANKS** to all of you!



THE CHAMBER TEAM



(Left to Right) Brittney Sissons, (Former Communications Coordinator); Caroline Miller, Policy & Communications Manager; Dan Rogers, Executive Director; Heather Eichinger, Sales & Business Development Executive; Dicky Dack, Office Manager; Nick Battaglio, Membership Account Executive; Diana Dors, Member Services Coordinator; Barb Bullen, Finance Manager; Allison Franczak, Member Services Manager (Missing: Our newest team member Jonelle Arango, Marketing & Communications Coordinator).



Not only have I been able to grow my business through networking and other Chamber events, but I have benefitted from the many additional learning opportunities provided by the Kelowna Chamber of Commerce. Thank you for being such a strong advocate and invaluable resource in our community.

JENNIFER LEACH-TRASK
JENNIFER GRANT INTERNATIONAL | OWNER/OPERATOR

A GREAT RETURN ON YOUR INVESTMENT

MEMBERSHIP AT ANY LEVEL OPENS OPPORTUNITY

A doorway to an entire world of doing business faster, smarter and more effectively. Four business levels from Bronze to Platinum offer plenty of choice for our members to grow, learn, and access a variety of discount programs that can help improve your bottom line. Our member care specialists know their members, work with them to ensure they know how to maximize their investment and all members feel included, engaged, and motivated to make the most of their Chamber membership..

PRESIDENT’S CIRCLE

At the pinnacle of membership is The President’s Circle, an exclusive club of only eight members, who are foundational to the success of not only our Chamber, but of our members. Interactive relationships between these top-line members with many other members offer enriching experiences to all.



THE UNIVERSITY
OF BRITISH COLUMBIA



PREDATOR RIDGE



At MNP LLP, being part of the community, and being seen as a leader in the community, is paramount. We stay involved in many ways, and our President’s Circle membership is a key avenue to ensure we’re front and centre at events, online, and ‘in the face’ of existing and prospective clients. This membership is of great value to our firm here in Kelowna.

TRINA WARREN

MNP LLP | REGIONAL MANAGING PARTNER



FINANCE CHAIR | MARTINE HICKMAN

FINANCE REPORT

2017 marked a year of transition for the chamber as we managed our change in leadership. The transition had an impact on our financial position leaving us with a net loss on operations but overall, the financial health of the organization remains positive. The loss would have been higher had it not been for some mitigation efforts that were put in place including delayed hiring on a couple of staff positions. Our membership numbers were fairly static through 2017: a good retention rate of 83% and a total of 1,221 paid members.

The most significant financial item that we managed this year was transitioning to a more accurate way of recognizing membership fees for both new and renewing members. These funds are now prorated over the year so as to recognize the revenue in each month from that member. This includes deferring revenue from year to year as noted in the financial statements. The Statement of Operations is provided here but full financial statements are available to any member upon request.

STATEMENT OF OPERATIONS For the year ended December 31, 2017

	2017 Actual	2017 Budget (Unaudited)	2016 Actual (Note 10)
	\$	\$	\$
REVENUES			
Memberships	547,575	549,769	556,751
Programs	230,289	241,700	240,535
Group insurance	102,018	92,800	92,313
Rent and office recoveries	47,928	47,706	45,150
Website	4,240	-	17,398
Interest	2,939	750	1,995
Travel programs	-	-	33,209
	934,989	932,725	987,351
EXPENDITURES			
Communications	20,529	22,750	20,039
Contract service	14,700	-	47,214
Depreciation	2,122	2,700	2,191
General and administrative	134,875	134,400	154,044
Memberships	30,021	36,600	31,716
Programs	174,318	161,500	172,503
Training and conferences	27,468	15,000	7,545
Travel programs	-	-	6,435
Wages and benefits	537,571	578,000	487,192
	941,604	950,950	928,879
EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES	(6,615)	(18,225)	58,472

WELCOME TO OUR NEW 2017 MEMBERS

ACRO MEDIA INC.	Acuity Business Group	Airtika Heating & Cooling Ltd.	Altair Capital
Apple Grove Auto Sales Ltd.	Arcadia Virtual Reality Lounge	Ashley Cornwell Scotiabank Home Financing Advisor	Audax Holdings Inc.
Axe Monkeys	BCPawn.ca	Big White Ski Club	Blimco Marketing & Web Design
Bliss Bakery & Bistro	BOST DIGITAL	Boutique Esthetics Lounge	Boyd Autobody & Glass
Brandnetic Studios Ltd.	Breakthrough Ministries Inter. - Faith. Promise. Harvest.	Business Examiner Thompson Okanagan	Caddick & Co Bookkeeping & Academy
Canadian Rooter Plumbers	Care Dental	CE Business Services 2017 Ltd.	Centra Windows
Cerulean Medical Institute	Chamber Music Kelowna	Cherie Dunn Personal Real Estate Corp - RE/MAX	Christian Labour Association of Canada (CLAC)
City Furniture & Appliances Canada	The Clinic Massage & Graston Therapy	Central Okanagan Heritage Society	Kewlchic Leggings
Cora Breakfast and Lunch	CRAFT Beer Market	Creekside Accounting Ltd.	Crystal Hills Organics
Cupcasions	Current Taxi	Cutting Edge Concepts	Canadian Wholesale Lighting
Davidson & Sons Customs Brokers	DDC Technical Services	Decisive Dividend Corporation	Devanda Corp - Billboards & Advertising
Dewey Cuttem & Howe Hair Company	Dockside Marine Centre Ltd.	Dorval Custom Woodworks & Handyman Service	Dr. Vicky Naturopathic Dr. and Holistic Nutrition School
Dr. Jennifer Procyshen MD, FRCSC, INC.	DRIVING FORCE Vehicle Rentals Sales Leasing	Dulcie Sharpe - RE/MAX Kelowna	Eco-Edge Landscapes
EcoLock Self Storage	Edwards Knutson Wealth Advisors	Enhanced Healing Massage Therapy	Elemental Structural Engineers Ltd.
EPIC Real Estate Solutions	Family Wishes Elite Sr. Prgms.	Famoso Pizzeria + Bar	Fawdry Homes
FITNESS WEST	Flair Airlines Ltd.	Fleek Factory	Flooring Canada Kelowna
Fresh Dental Hygiene	Galleria Fashions	Geord Holland Law Corp.	Get Organized with Meg
Girls Gone Green Kelowna	Globally Fair	VMC Sports & Entertainment Corp. - Golf BC Championship	Great Okanagan Beer Festival
Grizzli Winery	Fraser Financial Group	GTA Architecture Ltd.	Happipad
Healthy Transitions Consulting	Hergott Law	Hollett Catering	Holmes Electric Ltd.
Huska Holdings	Kelowna Hyundai / Buy Direct Truck Centre	Canada Infinity Tours Services Inc.	Inspired Window Fashions
International Yacht Training Worldwide	JDRF	Jeffrey Buck CFA - Investors Group	Jennifer Grant International
KMJ Projects Inc.	K-Town House Sitters	K-Town Lock & Key	Kaizen Institute Canada (BC)
Kelowna Chevrolet	Kelowna Concierge	Kelowna Exotic Car Tours & Rentals	Kelowna Fruit Stand
Kelowna Glass	Kent Employment Law	Kerr & Company, CPA	Keystone Property Management Ltd.

Kroma Interiors	Lakeside Diagnostic Hearing & Tinnitus Centre	Lemonade Bungalow Interiors	LifeSciences BC
Lone Maverick Inc.	Made In The Shade Kelowna	ManagerKnowHow	Marika Wolf, Real Estate Professional- RE/MAX
Mark Chiu Family & Immigration Law	Martinson Eco Landscaping & Irrigation	MasterWorks Coaching Group Inc.	McManus Marketing & Communications
Mission Creek Dental – Family & Cosmetic Dentistry	Mission Group	Monashee Manufacturing Corporation Ltd.	MONAT Global
Blue Bunch Farm Monika Walker Enterprises	MTL montREALfood	Moolix Ice Cream	Moore Greenery Landscaping Ltd.
Mountain Planning Group	The Moving Guide	The Munkey's Fist Grill & Bar	NAI Commercial Okanagan
National Money Mart	Navigator Multimedia Inc.	Nerium International – Ind. Executive Director	Normandeau Window Coverings
Nurse Next Door Home Care Services	Odette's Skin Laser Wellness Clinic	Okanagan Power Equipment	Okanagan Wine Country Tours
Optus Advisors Inc.	Orchard Valley Counselling Services	Owner Direct Vacation Rentals Inc.	Pacific M&A and Business Brokers Ltd.
PacificSport Okanagan	Pamela Lynch Coaching	Pandosy Street Developments Ltd.	PC Urban Properties Corp
Pharmasave #276 - Downtown Kelowna	Pivotal Payments	Porrelli Law	Pro Oil Change
Profit Mastery	Proxime	Red Fox Club @ Indigenous World Winery	Redline Contracting Ltd.
Revolution 3D Printers	Robert A. Wood - Coldwell Banker/Horizon Realty	Roy's Shoes & Repair	Rutland Physical Therapy Inc.
Sage Transitions	Sanga Living	Savour The Okanagan Tours	Société de développement économique de la Colombie-Britannique
Seca Surf and Marine	Shawn Stead Performance	Sheri-lee Voigt Life Coach & Fitness	SignCraft LTD
Silver Lining Management Consulting Inc.	SIMS Jewelry Co.	SIRKit Ltd.	Sony Real Estate Inc.
Sprott Shaw College - Kelowna Campus	Storm Roofing & Exteriors	Storyline Experience Consulting	TechFire Solutions
TerraWest Environmental Inc.	The Chopped Leaf - Orchard Plaza	3rd Generation Homes	Third Space Cafe Inc.
Tom Harris Banks Centre TELUS Koodo Store	TRS Building Envelope - TOMTAR Roofing & Sheet Metal	Total Restoration Services Inc.	Trinity Church Kelowna
TWP Fitness Inc.	UBreakiFix Kelowna	U-Haul Moving & Storage at Orchard Park	Valley Water Conditioning
Virtual Pro	Vitalis Extraction Technology Inc.	WestCabs	Westwear Industries
Wiener's Plumbing & Irrigation Ltd.	Wings Tap & Grill Kelowna	Winmar Property Restoration Specialists	Wright-Way Accounting Ltd.