

Kelowna Chamber OF COMMERCE

Helping grow the people
who power Kelowna



2019 ANNUAL REPORT



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Thank you
to our
**President's
Circle Members**



THE UNIVERSITY OF BRITISH COLUMBIA
Okanagan Campus

PRESIDENT'S MESSAGE

When I first became president of the Chamber, I reached out to close to 20 past-presidents to gain their perspective, and I must admit that I was inspired. I heard stories of the community as we all are travelling through this continuum from the points of view of Chamber presidents. I heard about how the Chamber is an integral part of the community as it continues to evolve and grow.

I also initially thought that I needed two or three initiatives to champion, but I soon realized that there's this beautiful ability to take the vision of those who came before you and to build upon that work. And that was certainly the case as the Chamber was re-accredited and adjustments were made to bylaws.

What also resonated with me was the power the Kelowna Chamber has when advocating on behalf of its members with all levels of government or driving policy development at the BC and Canadian Chambers. It's an incredible brand our Chamber has with its colleagues. When we talk, our peers listen.

Events were a constant during 2019/20, including the Business Excellence Awards which attracted a record audience in recognition of our business leaders. The Chamber also hosted Stephen Harper and there was such interest in hearing the former prime minister that close to 700 attendees forced a venue change.

Now, none of this happens without hard work, and the Chamber is fortunate to have dedicated and professional staff under the leadership of Executive Director Dan Rogers. I can't imagine being in the role of President without them. I was always prepared, and they were so supportive.

The team also includes the board of directors, who bring such valuable experience and knowledge to the table. During events, I took enormous pride in introducing our directors, ensuring the members



knew, "this is your board. I want you to know their names and faces, and they really want to talk to you."

Finally, I want to thank our members who allow the Chamber to do important work as the guardians of business. If I could wave a magic wand, it would be that every business belongs to the Chamber. When we have enough voices telling us what they need, we can speak with a single, meaningful voice that reflects the power of the crowd.

As my term concludes, I think back to those discussions I had with past-presidents and the insight they provided. It's an honour that I am now part of the archives of the Chamber and the tradition of making a difference in our community.

A handwritten signature in black ink, appearing to read 'Nikki Csek', written in a cursive style.

Nikki Csek
President

CEO, Csek Creative



2019/20 BOARD OF DIRECTORS



Carmen Sparg
Past President

Silver Lining Management Consulting Inc.



Jeffrey Robinson
Executive Vice President

Rush Ihms Hardwick LLP



Dan Price
Vice President

Emil Anderson Construction/
Dilworth Quality Homes



Ron Cannan
Vice President

Interior Savings Credit Union



Domenic Rampone
Vice President

West Manufacturing



Angela Nagy
Director

GreenStep Solutions



Shelagh Turner
Director

Canadian Mental Health Association



Andrew Ingenhorst
Director

Grant Thornton LLP



Andrew Brunton
Director

Pushor Mitchell LLP



Derek Gratz
Director

UBC Okanagan



Justin O'Connor
Director

Sotheby's International Realty



Pamela Pearson
Director

Sentes Automotive



Ray Wynsouw
Director

Candel Custom Homes



Robert Scott
Director

2M Performance



Laura Vigar
Director

Watson's Hound Lounge Corp.

Advisory



Trevor McTavish
Appointee

JCI Kelowna



Maxine DeHart
Appointee

City of Kelowna



Bill Gillett
Appointee

Okanagan School of Business



EXECUTIVE DIRECTOR'S MESSAGE

Change management expert, speaker and author Jim Hauden coined the phrase “adversity is the fuel for greatness”. That quote describes perfectly how things tend to work in the entrepreneurial world that most Chambers function in. It is a reality for many of the small businesses that are members of the Chamber and it is also a reality for us as an entrepreneurial not-for-profit organization which must earn every cent of revenue we bring in.

2019 had numerous challenges that created opportunities for the team to shine. When it came to shining, hosting former Prime Minister Stephen Harper had to be at the top of the list. Coming into the year we didn't expect that we would have the opportunity to host the political changemaker, but when it arrived, our team rolled up their sleeves and put together one of the largest luncheons we have ever hosted. With close to 700 in attendance from across the region, it was an overwhelming success with all challenges met – from security to providing a copy of Mr. Harper's memoirs to every single attendee – and event income also helped our bottom line, lessening the blow we took with an unexpected drop in membership as the year unfolded.

The drop in membership revenue required us to make some course corrections halfway through the year and the team responded well, putting together our most successful Business Excellence Awards event to date. Shifting to a Friday made a big difference in attendance and adding a silent auction created some fun, showcased some of our members and improved our bottom line. It is also extremely important to note that aside from the day-to-day challenges that popped up, we were successful in putting together a comprehensive application for re-accreditation by the Canadian Chamber Accreditation Council. The red seal of approval was received in the fall and is confirmation that we have



Chamber Executive Director Dan Rogers hosts session at OC with Federal Finance Minister Bill Morneau. Photo Credit: Okanagan College

all the policies, procedures and practices in place to be a leading Chamber of Commerce in Canada.

Aside from acknowledging the dedicated team that works for the Chamber, I also want to thank the many volunteers who contribute so much of their time to help our members from our Ambassadors to our volunteer Board of Directors. I continue to be impressed by the dedication of all to improving the economic well-being of those who live in this great community and region.

Finally, thanks to our many loyal members and business partners who support us throughout the year, year after year, attending events, sponsoring programs and helping us achieve our mission of creating a positive business environment where all can prosper.

Dan Rogers
Executive Director



ABOUT YOUR CHAMBER

Late last year, we received confirmation from Ottawa that our new bylaws had received Ministerial approval. Despite some tweaks to the bylaws, though, the fundamental mission of the Chamber hasn't changed since the organization was founded in 1906. We help grow the people who power Kelowna and the Central Okanagan by providing services of value that include advocacy, cost-saving benefit programs, and events that enable new business connections to be made or to continue.

Throughout 2019 we kept an eye on the issues which were important to our members and the business community and made sure we voiced those concerns with all three levels of government. We did that through our formal policy process at the BC Chamber and Canadian Chamber AGMs and informally through direct contact with our elected officials.

Many of our members also took advantage of our numerous affinity programs ranging from our extended dental and health care benefits (Chamber Group Insurance) to our fuel saving programs. Our programming also focused on professional development: our training workshops, seminars and monthly Business Smarts seminars all provided

opportunities for our members to learn and grow professionally. Finally, we offered dozens of opportunities for our members to make new connections that helped grow their business. These events allowed our members to expand networks, gain sales referrals, and meet the people who are eager to support each other in strengthening the local economy.

Proud Members of:

BC Chamber of Commerce
Know what's on BC's mind.



Canadian Chamber of Commerce

Chambre de Commerce du Canada

ok Kelowna
we got this

Stay tuned as we re-imagine our post COVID-19 Chamber future with you, our members.

In 2019
there were...



52 Newsletters and e-blast Communications

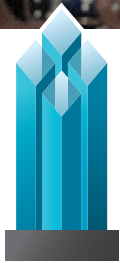


71 Media Releases



2 Media Conferences





Kelowna Chamber
**Business Excellence
 Awards 2019**

WINNERS

RISING STAR AWARD

✦ **Cannary Packaging Inc.**

Sponsored by Argus Properties

MICRO BUSINESS OF THE YEAR

✦ **Serviss Wealth Management**

Sponsored by Canadian Western Bank

SMALL BUSINESS OF THE YEAR

✦ **The Peacock Sheridan Group**

Sponsored by Prospera Credit Union

MID-SIZED BUSINESS OF THE YEAR

✦ **Hergott Law**

Sponsored by BDO LLP

LARGE BUSINESS OF THE YEAR

✦ **Valens GroWorks Corp.**

Sponsored by Grant Thornton LLP

YOUNG ENTREPRENEUR OF THE YEAR

✦ **Tyler Robson of Valens GroWorks Corp.**

Sponsored by YLW & EIA (Kelowna/Edmonton Int'l Airports)



NOT-FOR-PROFIT EXCELLENCE AWARD

✦ **Central Okanagan Community Food Bank**

Sponsored by Kelowna Foundation for Hope and Social Innovation

SOCIAL LEADERSHIP AWARD (for-profit business)

✦ **Boyd Autobody & Glass**

Sponsored by Interior Savings Credit Union

MARKETING CAMPAIGN OF THE YEAR

✦ **Predator Ridge Resort**

Sponsored by Pushor Mitchell LLP

ARTS & ENTERTAINMENT ACHIEVEMENT

✦ **Kelowna Museums Society**

Sponsored by Hergott Law

TECHNOLOGY INNOVATOR OF THE YEAR

✦ **Agents of Discovery**

Sponsored by University of BC Okanagan

EXCELLENCE IN TOURISM AWARD

✦ **Kelowna Concierge**

Sponsored by Tourism Kelowna

2019 BUSINESS LEADER OF THE YEAR

✦ **Jeff Stibbard of JDS Group**

Sponsored by MNP LLP





ADVOCACY

efforts that strengthen your voice and demonstrate the power of the crowd.

One of the Kelowna Chamber's marquee committees is the Policy Advisory Committee. Why? Being a Chamber member means having a voice – with all levels of government, at senior decision-making roundtables, and in the business community at large. There's no time for fake news at Policy committee meetings – issues raised by members to members are raised, discussed, and, as necessary researched and turned into policy.

How do we get our voices heard? We have multiple platforms for presenting, discussing, and making a real difference. Many of our members attend City Council meetings – every week. City officials reach out to the Chamber to discuss new initiatives; revisions in policy; to hear our members' voices before final decisions are made in Council Chambers.

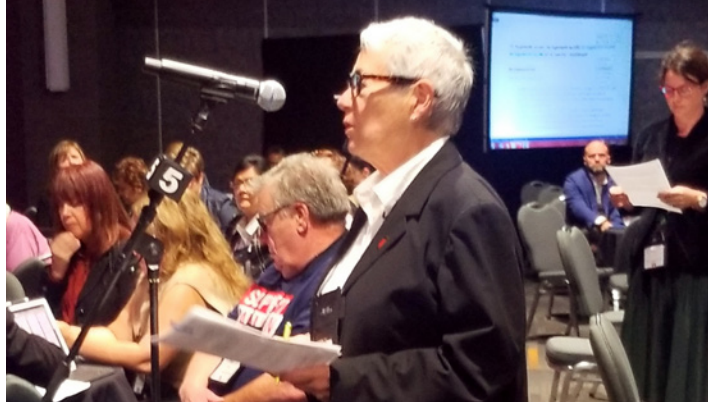
Provincial ministries send their Deputy Ministers, and ADMs to Kelowna to listen to the concerns of our Chamber, and our Okanagan-based chamber colleagues. We review our formal policies (submitted and adopted by the BC Chamber Caucus annually) and help move the dial on critical issues. Finally, we travel to the Canadian Chamber AGM annually, to moot those issues of national significance.



Team Kelowna prepares to vote on policies at BC Chamber AGM

The whole process is 'ground up' – our Chamber holds a Policy Development Forum every fall to canvass members on issues needing attention – we always come away with at least a dozen topics that need local, provincial, and sometimes national attention.





LEFT: President Nikki Csek and Alberta Premier Kenney at Canadian Chamber AGM Saint John, NB. MIDDLE: Policy Analyst Caroline Miller speaks to policy at Canadian Chamber AGM. RIGHT: Irish Consul Frank Flood visits with Chamber President Nikki Csek.

Wins in 2019:

- Progress toward removing inter-provincial trade barriers
- Changing the way distilleries and cideries are treated – leveling the playing field with wineries
- Supporting a sustainable tree fruit sector in BC
- Highlighting the strengths of creating a true aviation cluster in Kelowna
- Accelerating transportation infrastructure across the Okanagan region
- Quickening the pace of plastics recycling in the province
- Getting people and goods across international borders more efficiently



Kelowna and Vernon Chambers Team up at BC Chamber AGM



Roundtable with MLA Tracy Redies, Opposition Finance Critic

In 2019
there were...



9

Roundtable discussions with elected and community leaders



15

Policies developed and adopted at the BC Chamber and Canadian Chamber AGMs



Regional Consultation Session with Province



Chamber scissors at work for ribbon cutting at TKI Construction
From left: Dean Draglund, Brandon Panopoulos, Ron Cannan, Kevin Commins



BENEFITS

of belonging to the largest business network worldwide.

We welcomed over a hundred new members in 2019, many of whom joined to access our benefit programs which range from our extended dental and health care coverage, to our other cost-saving affinity programs that help members improve their bottom line.

The Chambers Group Insurance (CGI) Plan is available to all members regardless of their size or membership level. The program is #1 in the country for extended health care benefits for small business, and 2019 saw the program become even more popular with close to 30 new members. In 2019, Kelowna Chamber members also benefited from:

- **Payment Processing Machines (POS)** through First Data which is a leader in the electronic payment processing industry.
- **Fuel Saving Discount Cards** through Esso and Petro Canada which both offer discounts on gas and diesel fuel exclusively to Chamber members.
- **Advertising Discounts** through our local media partners which offer special rates to Chamber members.

- **Payroll Processing Software** through Payworks, a Canadian owned company that offers discounts to Chamber members who subscribe to their HR services that offer employee time-management solutions.
- **Hotel/Car Rental Savings** special rates for Chamber members only.

In 2019
there were...



314 +

**Kelowna Chamber organizations
enrolled in Extended Health and
Dental Plan**



What you said...



"We were thrilled to be recognized for the Small Business of the Year award among the many other deserving nominees and finalists. I know the Chamber team invests a lot of time and effort to host these awards every year and we all really appreciate it."

Jennifer Cartwright

Compass Program Coordinator, Peacock Sheridan Group



"We are truly proud to be a member of the Kelowna Chamber of Commerce and look forward to working closely with the Chamber team in the years ahead."

Dale Conway

Founder & CEO, Current Taxi



"The Chambers Group Insurance Plan was introduced to us in 2000 through TD Benefits of Kelowna and we've been able to offer valuable benefits to over 75 employees. CGI has always provided great customer service with easy navigation to online information through my-benefits. We look forward to continued coverage."

Stephen Wells

Kettle Valley Holdings



"We're always seeking ways to connect with our target market: business owners and decision makers. Becoming a member of the Chamber was part of our strategic plan – and the connections we make through their wide range of programs are far-reaching."

Rachel Clarida

Founder/Partner, Hatch Interior Design



"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, Owners



New members show off their official Kelowna Chamber of Commerce plaques.



Former PM Stephen Harper & BC Chamber Government Affairs Director Dan Baxter - March 2019.



CONNECTIONS

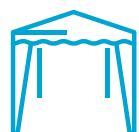
that shape the future and accelerate success.

In 2019, Kelowna Chamber events and programs continued to be one of the best places in the region for our members and business leaders to meet and share ideas. Whether it's bringing in former Prime Ministers, discussing the benefits of bringing down trade barriers, or facilitating discussion among potential political leaders, we continued to provide services of value to our members and the community.



2019 Parke Pacific Projects Chamber Golf Tourney was another sell out at the Harvest.

In 2019
there were...



41
Chamber
Events



4667

attendees at our
events/programs
with 1,300 attending
our Okanagan School of
Business Speaker Series





LEFT: Top 40 Over 40. MIDDLE: Commerce Connex Prospera. RIGHT: Speaker Series - Media Panel on Real or Fake News.

OUR SIGNATURE PROGRAMS

We have several programs we run on an annual basis to help celebrate the business and community leaders we have in the city and region. We also focus on programs that help our members and the community learn and strengthen their individual organizations.

Business Excellence Awards

We shifted our annual event from Thursday to Friday in 2019 and the move paid off with the largest attendance to date. We were pleased to work with presenting sponsors BDC & Farris LLP, to recognize the leaders who are powering Kelowna's success.

Commerce ConneX

Our monthly networking events helped showcase the diverse membership base we have.

Business Smarts

Our educational workshops that are held monthly are staged in our board room which, by the way, was completely renovated in 2019!

Sales Lead Network

We revamped SLN a bit in 2019, but weekly sessions continue with Chamber members who are helping each other grow their contacts, increase their sales leads and help drive business.

Annual Chamber Golf Classic

We were excited to work with our new presenting sponsor, Parke Pacific Projects in hosting our 34th Annual Golf Tournament. The tournament was staged at the Harvest Golf Course and was sold out again. We also raised \$6,490 for our designated Charity, KidSport.

BDO Top Forty Over 40

With the help of title sponsor BDO, in 2019 we recognized Kelowna's top forty over 40 – forty exceptional business and community leaders.

Okanagan School of Business Speaker Series

Through our speaker series we hosted numerous luncheons and a couple of breakfasts with special guests such as Kelowna Mayor Basran who provided his Annual state-of-the-city address.

We also were pleased to host:

- **TAP** - The Trade Accelerator Program was a multi-day session aimed at helping companies grow their export potential.
- **Ignite Okanagan** – a half-day conference to help employers understand the potential benefits of hiring newcomers, and other special events.
- **Governance Training** – a one day workshop to help our non-profit members and community organizations gain knowledge around governance best-practices.
- **Budget Briefing Breakfasts** – we staged briefing sessions following both the provincial and federal budgets and will continue to do the same in 2020.
- **All Candidates Federal Forum** – As part of our efforts to inform our members, we hosted a breakfast with all the federal candidates from both city ridings. Speed dating with the candidates was a highlight for the many who attended.



FINANCE REPORT

2019 was challenging financially for the Chamber as our retention rate dropped by 5%; that resulted in \$55,000 less in membership revenue. With foresight and adjustments in operations the loss was mitigated by additional non-dues revenue, primarily from the luncheon with former Prime Minister Stephen Harper and our best-ever Business Excellence Awards.

Unfortunately, we continue to operate without a tenant and the revenue that flows from renting that space. Under our lease we can only have another not-for-profit as a tenant and so far, we haven't been able to find one. Under our complicated land lease, we get to use the site for \$1 a year but are also required to pay the property tax which in 2019 was over \$30,000. On the plus side, we have worked with the City to modify our lease agreement so that going forward we will only be responsible for the taxes on the actual space we occupy. At the end of the fiscal year we had a \$31,000 deficit. Prior years' surpluses, including a \$40,000 surplus in 2018, have helped cushion the impact on our financial position. The Statements of Operations is provided here but the complete audited financial statements are available to any member to view: just contact the office.

Dan Price

Chair, Finance Committee

STATEMENT OF OPERATIONS

For the year ended December 31, 2019

	2019	2018
REVENUES	\$	\$
Memberships	497,623	549,653
Programs	382,455	256,286
Group Insurance	121,627	113,296
Rent and Office Recoveries	30,723	38,766
Website	3,148	2,229
Interest	6,155	4,118
	1,041,731	964,348
EXPENSES	\$	\$
Communications	22,120	27,515
Contract service	5,670	2,550
Depreciation	8,163	6,694
General and Administrative	150,078	130,453
Memberships	39,578	53,890
Programs	270,742	184,983
Training and Conferences	25,844	21,684
Wages and Benefits	550,728	496,951
	1,072,923	924,720
EXCESS (DEFICIENCY) OF REVENUES OVER EXPENSES	(31,192)	39,628

STAFF



Dan Rogers
Executive Director



Dicky Dack
Office Manager



Caroline Miller
Policy Analyst
& Media Relations



Heather Kalman
Member Services
Manager



Jenna Duke
Member Services
Coordinator



Liana Pesl
Administrative
Assistant

In 2019 we took a bit of time to recognize our Office Manager, Dicky Dack, who celebrated her 25th year with the Kelowna Chamber. She was recognized by the Chamber network at the national convention in Saint John, NB for reaching that milestone. Early in 2019 we also added Heather Kalman, Jenna Duke and Matt Stone to the team. Unfortunately for us, we lost Matt Stone who left in the fall to pursue another opportunity in Kelowna. We also bid farewell to Heather Eichinger, and in the last couple of months we also saw Craig Hall and Brett Kryskow move on to new opportunities. We wish them all well in their new endeavours and are excited about the new additions who will be joining our team soon.

Ambassadors

Our volunteer Ambassadors make the organization shine and we thank this dedicated group for being so passionate about the community and for being so welcoming to our new members. Your dedicated efforts throughout the year strengthen the organization and are one of the reasons why the Kelowna Chamber is one of the leading chambers in the country.



*Chamber Abassadors
Shine at Fall ConnExpo*








www.kelownachamber.org


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Email: hello@kelownachamber.org

 @KelownaChamber

 @KelownaChamber

 @kelownachamber

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Kelowna Chamber
OF COMMERCE