

The logo for the Kelowna Chamber of Commerce features a blue arc above the text and a green arc below it. The text is in a bold, sans-serif font.

**Kelowna  
Chamber**  
OF COMMERCE

*Helping grow the **people**  
who **power** Kelowna*



**2018  
ANNUAL  
REPORT**



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



# PRESIDENT'S MESSAGE

I have learned so much by being part of the Chamber, and it constantly hits home about how impactful the organization truly is.

And while there are so many aspects to the Chamber, policy work keeps me motivated. Particularly, it's been rewarding to be a part of the Chamber network and together, influencing political decisions that impact business. Our fight against the Speculation Tax in BC is a good example. We didn't agree with the provincial government's approach and while we ultimately didn't get the tax stopped, we didn't shy away from rolling up our sleeves and fighting for our members' interests. We were also proud to attend the Canadian Chamber of Commerce AGM in Thunder Bay, bringing two policies to the floor that were adopted with strong support. In fact, Federal Finance Minister Bill Morneau referred to our interprovincial trade policy in his Fall Economic Update, a direct result of our actions.

Kelowna is at the very heart of everything we do, and the Chamber values our relationship with local government—the City of Kelowna and the Regional District of the Central Okanagan. We engage with them to build and maintain a robust community and economy, and we also want meaningful bonds between business and the social sector.

Our commitment to community is also demonstrated by the board of directors who voluntarily give their time to guide the Chamber and consult with other local economic organizations. Among those committed individuals is Ken Carmichael, who left the board in 2018 after many years of service. It truly was an honour to recognize Ken as a life member of the Chamber.

But none of what we do would be possible without our Chamber staff, who under the leadership of



Executive Director Dan Rogers, make the Kelowna Chamber relevant and proactive. I want to thank each one of them for their energy, passion and professionalism.

Finally, I would like to thank our members. You play a pivotal role in the organization, whether it's attending events, sponsoring programs, volunteering your time or keeping our feet to the fire. Our Chamber is stronger because of its vibrant membership.

A handwritten signature in black ink, appearing to read 'Carmen Sparg', with a long horizontal stroke extending to the right.

**Carmen Sparg**

President

*Silver Lining Management Consulting Inc.*

# 2018 BOARD OF DIRECTORS

President Carmen Sparg is joined on the board by:



**Tom Dyas** Past President  
*TD Benefit Solutions*



**Una Gabie** Executive Vice President  
*Touchstone Law LLP*



**Stuart Grant** Vice President  
*Cariboo Central Railroad Contracting Ltd.*



**Nikki Csek** Vice President  
*Csek Creative*



**Ron Cannan** Vice President  
*Interior Savings Credit Union*



**Angela Nagy** Director  
*GreenStep Solutions Inc.*



**Andrew Ingenhorst** Director  
*Grant Thorton LLP*



**Shelagh Turner** Director  
*Canadian Mental Health Association*



**Al Hildebrandt** Director  
*Kelowna Foundation for Hope and Social Innovation*



**Dan Price** Director  
*Emil Anderson Construction*



**Domenic Rampone** Director  
*West Manufacturing Ltd.*



**Jenelle Hynes** Director  
*Pacific Coastal Airlines*



**Andrew Brunton** Director  
*Pushor Mitchell LLP*



**Marek Buryska** Director  
*Valley First Credit Union*

## Appointees



**Dr. Barry McGillivray**  
*Okanagan School of Business*



**Tracy Gray**  
*City of Kelowna*



**Jeff Robinson**  
*Rush Ihas Hardwick LLP*



**Gene Bernier**  
*JCI Kelowna*

# YOUR CHAMBER

Since 1906, we've been working to foster a positive business environment in the Kelowna region. Our members include entrepreneurs, small- and medium-sized businesses, non-profits, academic institutions and large corporations.

We advocate for our members with government at all three levels. On important matters such as regulations and community concerns, we help ensure our members have a voice, including working closely with other Chambers across BC and Canada.

We also strive to provide benefits and services of value to our members, including the Chambers of Commerce Group Insurance Plan and exclusive savings and discounts on essential business services.

We host regular training seminars and experts at speaking events.

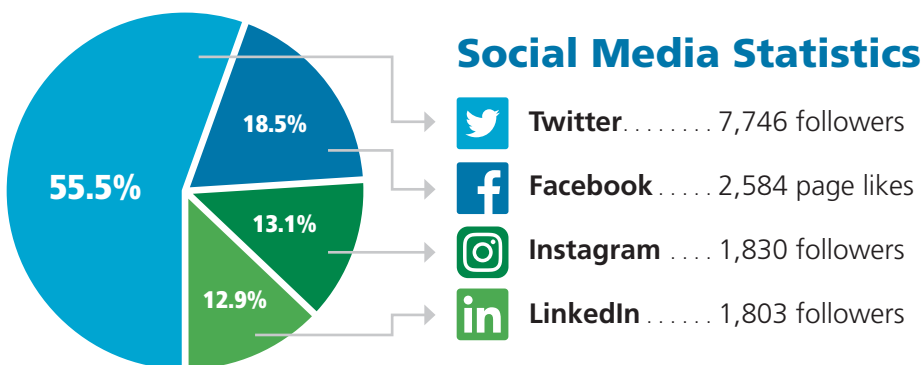
Finally, our members choose us to make connections. Whether you are new to the Kelowna area or have been in business here for decades, joining the Kelowna Chamber of Commerce continues to be the best way to expand your network, gain sales leads, meet people in your industry and to become part of a larger business community in the central Okanagan.



**Chambers of Commerce Group Insurance Plan®**

**290+**  
Kelowna Chamber members enrolled in Chamber Group Insurance (CGI) Plan

**30,000+**  
firms across Canada enrolled in CGI Plan



**Proud Member of:**

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

**Canadian Chamber of Commerce** / **Chambre de Commerce du Canada**



LEFT: The Board shares a laugh on stage at the Presidents Dinner MIDDLE: Executive Director Dan Rogers at the BC Chamber AGM in Kamloops. RIGHT: British Consul General Vancouver Nicole Davison (centre) with Executive Director Dan Rogers and Director Ron Cannan).

# In 2018 there were...



**46** Chamber events



**3,360+** attendees



**358** people that attended the Chamber Luncheon Series: State-of-the-City 2018

with Keynote Speaker Mayor Colin Basran

**THIS WAS OUR LARGEST EVENT**



**24** newsletters and e-blasts



**42** press releases



**150** new members

## Executive Director's Message

You may not know who Heraclitus is but I bet you have heard a phrase he is well known for. He was the Greek philosopher who was quoted as saying "the only consistent thing in life is change." Well, 2018 was a year of change for the Kelowna Chamber. We said goodbye to our long-time partner and tenants Tourism Kelowna as they opened their new info centre on the waterfront. That left us scrambling to fill the space in our building, something we are optimistic that we will have resolved soon. We also experienced some significant changes with several new staff joining us and a few who had been around for awhile leaving to pursue other opportunities. Whether it is our current staff or our previous, I could not be prouder of the way the team rolled up their sleeves and worked so hard on your behalf to ensure we continued to grow as an organization and continued to put on first-class programs and events despite being a bit short-handed on occasion.

I am also extremely fortunate to have such a dedicated team of volunteers in our Chamber Ambassadors. It is an honour to work alongside such a wonderful group. I feel privileged to work for a dedicated volunteer board and was pleased to join President Carmen Sparg at the BC Chamber AGM in Kamloops and at the Canadian Chamber in Thunder Bay where, I am pleased to say all our policies were endorsed!

Finally, I also wanted to send a shout out to all our many corporate partners and sponsors who help us throughout the year to ensure we are focused on our mission of creating a positive business environment in the city and region. We couldn't do the good work we do without your partnership.

Sincerely Yours,

**Dan Rogers**



The Kelowna Chamber played a key role in supporting local gov leaders who spoke out against the Spec Tax (at UBCM Sept 2018).

Advocacy is the heart of what keeps our Chamber engaged with members, government and the community. Our Policy Advisory Committee of the Board spends time reviewing both identified issues, and ad hoc concerns as they arise, seeking clarity and evidence-based decision making that helps us live up to our mission. We work closely with local and provincial chambers, the BC Chamber and the Canadian Chamber of Commerce.



Debating proportional representation.

### Spec Tax

Front and centre in our advocacy efforts this year was opposing the anti-Canadian tariff Speculation Tax and co-founding the “Scrap the Spec Tax” coalition. Our Speculation Tax resolution passed unanimously at the BC Chamber and was one of our six tabled and adopted by our collegial chambers province-wide.

### Prop Rep Referendum

At the BC Chamber AGM, we brought a resolution to the floor calling on the BC government to provide greater transparency and increased engagement with British Columbians prior to holding the fall referendum on electoral reform. The resolution passed with overwhelming support. We also played a leadership role in bringing both sides of the issue together for a well-attended debate in Kelowna. Ultimately, the referendum failed.

### Inter-provincial Trade Barriers

At the Canadian Chamber AGM in Thunder Bay, we tabled a resolution calling on the federal Government to work with the provinces to remove inter-provincial trade barriers that limit the sale of BC products across Canada. The delegates were nearly unanimous in their support of our policy resolution





LEFT: President Carmen Sparg and Executive Director Dan Rogers met with our three area MLAs during a trip to the Legislature in October that included meeting with BC Housing Minister Hon. Selina Robinson. RIGHT: Members of the Board with friends of the Chamber sport their jerseys for the Humboldt Broncos.

and we were extremely pleased when the policy was mentioned by the Federal Finance Minister when he tabled his fall economic update.

## Member Roundtables

Roundtables continued to be an effective way to connect policy makers with local member business and community leaders throughout 2018. Among visiting elected officials were Conservative Party of Canada Leader the Honourable Andrew Scheer, the Honourable Andrew Leslie, MP Orléans, Stephen Fuhr, MP Kelowna-Lake Country and the Honourable Shane Simpson, BC Minister of Social Development and Poverty Reduction. Numerous elected officials from all three levels of government attended other Chamber functions and interacted with members.

## Second Annual Policy Forum for Members

In November, we began the 2019 policy cycle by inviting members from a range of industries and organizations to come together to discuss and suggest specific policy issues in ten separate areas of concern, from healthy communities to transportation to agricultural matters. Over 50 specific issues were captured for further research, and 15 municipal advocacy topics went onto our books: enough to keep us engaged with three levels of government throughout 2019. Our thanks to all our 60+ members who contributed their time and thoughts to our advocacy workshop.



The Honourable Andrew Sheer MP PC chats with Chamber Past-President Tom Dyas.



Stephen Fuhr MP Kelowna-Lake Country leads a roundtable at the Kelowna Chamber.



Okanagan College President Jim Hamilton (left), Accelerate Okanagan CEO Raghwa Gopal (centre) and UBC Okanagan Deputy Vice-Chancellor and Principal Deborah Buszard speak at a Chamber luncheon.



# BENEFITS

President Carmen Sparg joined local dignitaries for the grand opening of Fender at Wentworth Music.

We continued to welcome new members to the fold in 2018, many of whom joined to access our signature package of benefits available to Kelowna Chamber members.

Notably, the Chambers Group Insurance (CGI) Plan, available to all members regardless of organizational size or membership tier, continued to be a major attractant. Many small businesses, non-profits and entrepreneurs especially found the CGI Plan beneficial to their bottom line and the wellbeing of themselves and their staff. Many members also found it an effective employee retention feature with affordable and stable rates.

In 2018, Kelowna Chamber members also...

- **Processed payments effectively**—First Data, a leader in the electronic payment processing industry, partnered with Chamber members on tailor-made merchant service solutions
- **Saved at the pump**—In a year in which we saw gas prices shoot up considerably, our Esso Business Card and Petro Superpass helped members large and small save with discounts on gas and diesel
- **Managed their business/organization**—Canadian-owned Payworks offered substantial discounts on payroll, HR and employee time-management solutions, exclusively to Kelowna Chamber members
- **Spread the word**—not only did Chamber members benefit from networking and promotional opportunities directly through the Chamber, members received discounts on advertising fees with Capital News Advertising and KelownaNow Advertising



Chamber members attending the Trade Accelerator Program (TAP) brought to Kelowna by World Trade Centre Vancouver.

# What you said...



**Allan Blyt** *Hager Orthopaedic Clinics Ltd.*

“As a small business owner, I didn’t think it was possible to provide to our staff affordable extended health benefits. I was wrong! The Chamber Group Insurance Plan has not only **OFFERED US PEACE OF MIND AND QUALITY CARE AT A MANAGEABLE PRICE POINT**, allowing us to care for our patients. Thank you!”

**Matthew Barnett** *TerraWest Environmental Ltd.*



“The Chamber has been great at helping us establish ourselves in Kelowna, from access to their membership, putting on varied and great events and offering **SUPPORT AS WE GROW.**”

**Sean MacMillan** *Orthoquest Pedorthics*



“In 2018 we were nominated for Small Business of the Year at the Business Excellence Awards. We were introduced to 300+ members of the Chamber at the awards ceremony and **OUR PRESENCE WAS GREATLY ELEVATED** with the general public. The experience turned out to be a great promotional tool for us. Thanks for all of the work done by the Kelowna Chamber on behalf of the business community!”

**Dave Lytton** *Complete Mortgage Services*



“All of us in business need sales to exist. For my business, word of mouth referrals have been the main driver for my sales, by far. This is why it is so important to join groups like the Chamber of Commerce. Over time, **GREAT RELATIONSHIPS ARE FORMED** so the members can refer my name with confidence that their referrals are going to be handled timely and professionally.”



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



# CONNECTIONS

In 2018, Kelowna Chamber events and programs continued to be the premier place for our members and entrepreneurs to meet and share ideas. Whether it's bringing in expert speakers, discussing the issues that affect our communities or facilitating meet-and-greet events with political and business leaders, we continued to provide services of value to our members and the wider community.

## Business Excellence Awards

A night of glitz, glam and recognition—since 1987 we've recognized the best in Kelowna business with our annual Business Excellence Awards. Some of the big winners in 2018 included: Start Fresh Kitchen (Rising Star Business of the Year), Vitalis Extraction Technology (Technology Innovator of the Year) and Dale Wentworth, Wentworth Music (Business Leader of the Year). This year we also added a luncheon prior to the gala so we could recognize all the nominees who weren't top three finalists. It turned out to be a really fun event that will certainly return in 2019.



*Business Excellence Awards Gala.*



LEFT: Rooftop networking for Commerce Connex. MIDDLE: President Carmen Sparg with finalists at the Business Excellence Awards nominee's luncheon. RIGHT: At the Harvest Golf Club for our annual tourney (sold out again!)

## Commerce Connex

Our signature monthly networking event helped launch new and improved locations (Vibrant Vine, Tourism Kelowna Visitor Centre), usher in the summer (Summerhill Pyramid Winery) and ring in the holiday season (Boyd Autobody & Glass). Good food, great prizes and even better company, Commerce Connex continued to be one of our most popular regular offerings. This year we also teamed up with the Greater Westside Board of Trade for a combined business networking event, something we will continue to pursue in 2019.

## Business Smarts

Local businesses continued to receive monthly advice and guidance about everything from IT security to interior design to mindfulness through our continuing Business Smarts series, hosted in a small group setting in our boardroom.

## Sales Lead Network

Held twice weekly over breakfast, non-competing members continued to grow their sales leads and make contacts in the business community with this exclusive Chamber offering.

## 33rd Annual Kelowna Chamber Golf Tournament

More than 140 golfers descended on the Harvest Golf club for our wildly popular annual tourney. Peter Angle of K96.3 was our emcee and did a fabulous job. Olympic gold-medalist Kelsey Serwa spoke at the evening banquet. We were also pleased to have

KidsSport as our designated charity and help to raise more than \$2,300 through this event. Investigations are ongoing into several scorecard irregularities.

## BDO Top 40 Under 40

With the help of title sponsor BDO, in 2018 we recognized Kelowna's Top 40 Under 40—forty exceptional young business and community leaders. Over several weeks, honourees were profiled across local media outlets, culminating in a celebration held at the Kelowna Innovation Centre.



## Okanagan School of Business Speakers Series

Through our Okanagan School of Business Signature Speaker Series, we hosted numerous breakfast and luncheon events in 2018 with special guests such as British Consul-General to BC Nicole Davison and BC RCMP Deputy Commissioner Brenda Butterworth-Carr. We also discussed important community issues such as Proportional Representation and the business of cannabis. And of course, we helped you make sense of both the provincial and federal budgets and hosted Mayor Colin Basran for our annual state-of-the-city address.

# FINANCE AND OPERATIONS REPORT

2018 was a solid year for the Kelowna Chamber financially, though the positive financial results weren't achieved without some significant foresight and adjustments throughout the year.

The biggest challenge we faced was a loss of revenue when our tenant left our building midway through the year. Some quick operational adjustments provided more revenue through the sale of additional parking spaces. That decision allowed us to mitigate the impact to the budget of not having a tenant for almost half the year.

The Statement of Operations is provided here but the audited financial statements are available to any member, just contact the office to review.

## Stuart Grant

Chair Finance Committee

### STATEMENT OF OPERATIONS

For the year ended December 31, 2018

	2018 Budget	2018 Actual	2017 Actual
	\$	\$	\$
<b>REVENUES</b>			
Memberships	576,950	<b>549,653</b>	547,575
Programs	256,660	<b>256,286</b>	230,289
Group Insurance	100,500	<b>113,296</b>	102,018
Rent and Office Recoveries	44,400	<b>38,766</b>	47,928
Website	5,000	<b>2,229</b>	4,240
Interest	750	<b>4,118</b>	2,939
	984,260	<b>964,348</b>	934,989
<b>EXPENDITURES</b>			
Communications	25,720	<b>27,515</b>	20,529
Contract service	-	<b>2,550</b>	14,700
Depreciation	3,000	<b>6,694</b>	2,122
General and Administrative	131,500	<b>130,453</b>	134,875
Memberships	39,750	<b>53,890</b>	30,021
Programs	164,440	<b>184,983</b>	174,318
Training and Conferences	35,000	<b>21,684</b>	27,468
Wages and Benefits	559,760	<b>496,951</b>	537,571
	959,170	<b>924,720</b>	941,604
<b>EXCESS (DEFICIENCY) OF REVENUES OVER EXPENDITURES</b>	25,090	<b>39,628</b>	(6,615)

# STAFF



**Dan Rogers**  
Executive Director



**Dicky Dack**  
Office Manager



**Caroline Miller**  
Policy Analyst  
& Media Relations



**Brett Kryskow**  
Sales & Business  
Development Manager



**Heather Eichinger**  
Sales & Business  
Development Executive



**Heather Kalman**  
Member Services Manager



**Jenna Duke**  
Member Services Coordinator



**Matt Stone**  
Communications Coordinator



TOP: Diana Dors (left), Jonelle Arrango (centre), Allison Franczak (right). BOTTOM: Kelowna Chamber Ambassadors.

Change is natural in any organization and that certainly was the case in 2018 as we bid farewell to Diana Dors who was responsible for new members, Jonelle Arrango in communications, Allison Franczak, who led our member services, Finance Manager Barb Bullen and our Sales Consultant Nick Battaglio.. At the same time, we welcomed Brett Kryskow as Sales and Business Development Manager and later Heather K, Jenna and Matt in early 2019.

Even with these changes, one thing remained a constant and that was our dedicated and passionate staff who work extremely hard on your behalf.

## Ambassadors

We also couldn't be one of Canada's leading chambers if it weren't for our Chamber Ambassadors. Thank you to this great group of volunteers!



**[www.kelownachamber.org](http://www.kelownachamber.org)**

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