

The logo consists of four overlapping, curved, leaf-like shapes in various shades of orange and light beige, arranged in a cross-like pattern. The background is a solid, vibrant orange.

# **Kelowna Chamber**

## **STRATEGIC PLAN 2021-2023**

*Updated November 24, 2020*

Helping grow the people who power the Okanagan.

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The Kelowna Chamber of Commerce is a federally incorporated not-for-profit organization that is dedicated to connecting, serving, and empowering the Kelowna and region business community. The Chamber provides numerous services to its 1,000 members and the broader business community including educational seminars, major events, member benefits, and government advocacy. In 2021, the Kelowna Chamber will celebrate its 115<sup>th</sup> year and it continues to be recognized as one of BC's leading business associations and among the leaders in the Canadian Chamber network. The Chamber invests 100% of the revenue it receives back into programs and services that continually add value to members, ultimately growing the Chamber's reputation and membership base. The Board is elected from the membership and comprises leaders from various industry sectors and operates with a policy governance model and succession leadership that ensures efficiencies and strategic long-term outcomes.

## OUR VISION

*We are the indispensable business organization in Kelowna and area.*

## OUR MISSION

*We exist to foster a positive business environment by providing members with leadership, advocacy, and services of value.*

## OUR VALUES

**Trust** ✖ **Passion** ✖ **Shared Ownership** ✖ **Continual Improvement** ✖ **Organizational Excellence**

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## EXECUTIVE SUMMARY

This document sets out the strategic priorities of the Chamber for 2021-2023. These priorities were developed by the Board of the Kelowna Chamber during deeply uncertain times. COVID-19 has changed the business, economic, and personal lives of citizens throughout the world and Kelowna is no exception. As of the writing of this plan, it is still unknown when (or if) the pandemic will no longer affect daily life. It is reasonable to expect that the influence of COVID-19 will be a factor for most of the planning period.

The Key Performance Areas (Goals) as identified by the Board are:

1. **Grow Membership** by strengthening the Chamber's value proposition
2. **Be the Leader in Advocating for an Improved Economic Environment** while entrenching our position as the voice of business in Kelowna and Okanagan Valley
3. **Determine the future of the Chamber's Building** while ensuring short and long-term office and operational needs are met.

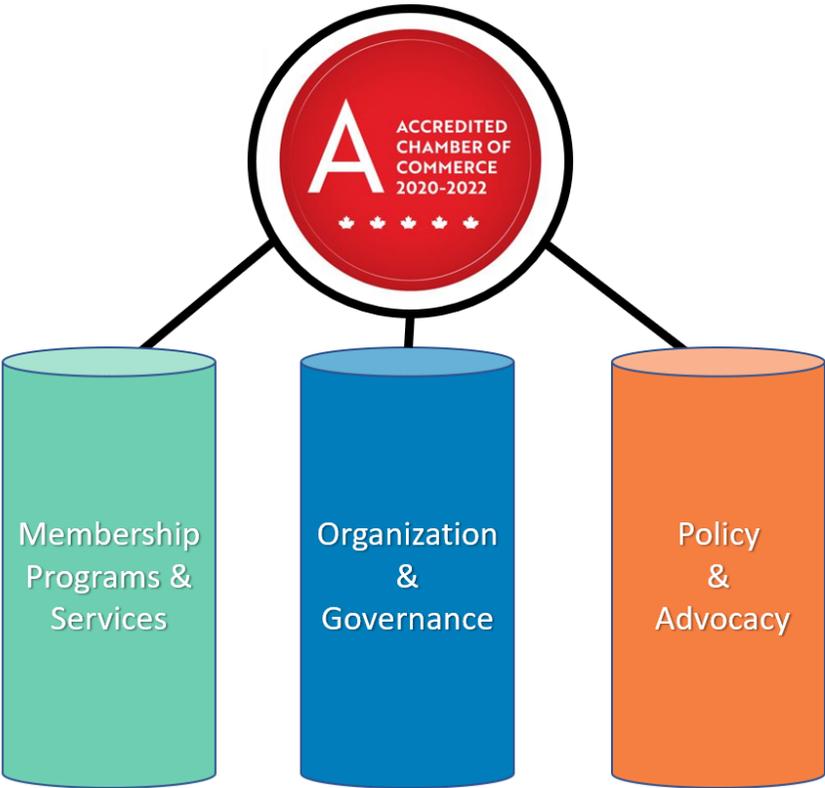
The three goals identified by the Board are shown in several different ways for ease of understanding how those specific priorities fit into the broader overarching pillars of the Canadian Chamber Accreditation Framework. The Chamber was re-accredited in 2019, a professional designation which continues until 2022.

The first section of this document captures the Board's goals along with suggested strategies. The second section of this document expands on the Board's goals, objectives, and expected outcomes which are meant to strengthen the Chamber over the course of this plan, ultimately increasing the value we provide to our members and the community. Expected outcomes have been added to establish general indicators of progress towards achieving the identified goals.

This strategic plan is the foundation that the organization's business plan is built upon and is not intended as a stand-alone document. Staff work plans are also informed by this and previous strategic planning efforts, ongoing membership engagement, and past operational experience. The Chamber also understands that we live in a dynamic environment where issues emerge that may require adjustments to work plans to accommodate such change. The impact of COVID-19 is a good example of the requirement to be flexible as an organization to respond to emerging issues that impact members, the business community, and the Chamber as an organization.

**ACCREDITATION FRAMEWORK**

The Kelowna Chamber is a nationally “Accredited Chamber” under the accreditation program established and maintained by the Canadian Chamber of Commerce. There are three identified pillars in this program, and they provide the framework that ensures the Chamber has solid business practices in place and the Chamber’s operations are of the highest standard. The three pillars of accreditation are shown in the graphic below and are a guide when establishing strategic priorities and operational workplans.



## CONTEXT OF THE PLAN

The current plan was created following a one day retreat with the Board of Directors in August 2020 and subsequent discussion by the Board and Executive Committee, the latter being charged under its terms of reference to monitor the progress of the Board's Strategic Plan. This plan should be considered a living document that is subject to change if and as necessary and reviewed and updated annually by the Board.

Another important element the Board considered while discussing the priorities for the three-year plan was the continuing pressure on membership numbers. Although membership revenues remain relatively strong, for the Chamber to retain its relevance as representative of the business community, attention to membership numbers, particularly in this time of deep economic uncertainty (COVID-19), remains a major concern and is a primary priority of this plan.

## KEY PERFORMANCE AREAS (Goals):

The previously identified goals are listed below with some additional explanation to assist in understanding the Board's proposed direction under each goal.

### **1. GROW MEMBERSHIP BY STRENGTHENING THE CHAMBER'S VALUE PROPOSITION**

Recruit, engage, and retain members who represent a diverse membership base to ensure the continued credibility of the Chamber as the leading organization representing Kelowna's business community.

### **2. BE THE LEADER IN ADVOCATING FOR AN IMPROVED ECONOMIC ENVIRONMENT WHILE ENTRENCHING OUR POSITION AS THE VOICE OF BUSINESS IN KELOWNA AND THE OKANAGAN**

Continue to lead the region in advocacy while sustaining our role as a collaborative partner in enhancing the economic environment of the city, region, and province.

### **3. DETERMINE THE FUTURE OF THE CHAMBER'S BUILDING WHILE ENSURING SHORT AND LONG-TERM OFFICE AND OPERATIONAL NEEDS ARE MET.**

Plan for the future of our building (or its replacement) as it approaches the end of the lease period (2026) while also considering the effectiveness of our recent move to virtual work.

## KEY PERFORMANCE AREAS AND SUPPORTING STRATEGIES

### **Goal #1: GROW MEMBERSHIP BY STRENGTHENING OUR VALUE PROPOSITION**

#### **Context**

Generally, the Board endorsed the current membership program including:

- Confirmation that the Chamber is a generalist, big tent organization representing broad business interests.
- The current tiered pricing strategy was confirmed and endorsed. This delivers more revenue per member, resulting in two distinct outcomes that will be used to measure success, total revenue from membership as well as total number of members. More revenue means greater investment into programs and services that benefit members.
- Advocacy on behalf of member (and all business) interests remains a core offering of the Chamber.

#### **Strategy 1.1 – REVIEW RETENTION PLAN AND ENSURE IT IS AMONG THE BEST IN THE COUNTRY**

Undertake a thorough review of the Chamber’s Retention Plan with third party assistance to ensure the Chamber is implementing “best practices” in onboarding and retaining new members. This work should include:

- Reviewing the Chamber’s current process for identifying reasons for not renewing to determine if there are better approaches to managing that feedback that yield valuable insights.
- Develop and produce an easy to read dashboard that summarizes the number of members at each level and where they fit in the current membership segmentation quadrants.

#### **Strategy 1.2 – REVIEW & ENHANCE PROGRAMS ENSURING THEY ALIGN WITH QUADRANTS (SEGMENTATION) OF MEMBERSHIP AND ATTRACT A DIVERSE MEMBERSHIP**

Determine the value of creating specific programs and initiatives to attract targeted demographics such as young entrepreneurs, women in business, and newcomers looking to establish themselves in the local business community by developing specific stand-alone programs or through partnering with other organizations already operating in this area (i.e., with COEDC’s OYP). This includes evaluating the proposed Leadership Program under discussion with Okanagan College and others.

#### **Strategy 1.3 – POSITION THE CHAMBER AS THE “GO TO” ORGANIZATION FOR LOCAL BUSINESS INTEL**

Work with the BC Chamber to become a MindReader Community Champion to access local data on business insights. Create an economic indicator report card using data from Stats Canada and other sources with a goal of creating a monthly dashboard for the City and region.

## ***Strategy 1.4 – EXAMINE OPTIONS TO MAKE OUR ONLINE DIRECTORY MORE ROBUST AND MAKE ACCESS TO IT EASIER FOR MEMBERS/NON-MEMBERS***

Explore options to improve our member directory and to better showcase our members through various means ranging from consideration of a chamber app to the publication of a buyer’s guide.

## ***Strategy 1.5 – DEVELOP A REVITALIZED MARKETING STRATEGY***

Create a refreshed Marketing Plan that is adequately resourced and:

- Targets specific demographics which we see as potential future members such as business students at Okanagan School of Business.
- Captures ways to make our current members our best advocates through initiatives such as a revamped testimonial and referral program.
- Uses curated data on current and past members to identify opportunities to “win-back” members who may have been a part of the network in the past and use that information to entice them to re-join.
- More aggressively promotes our cost-saving benefit (affinity) programs and identifies opportunities for new or enhanced offerings.
- Includes a strategy to share stories about our policy and advocacy work (wins).

## ***Strategy 1.6 – BUILD CAPACITY THROUGH THE USE OF VOLUNTEERS, PRACTICUM STUDENTS, CO-OP STUDENTS, AND INTERN POSITIONS***

Expand the number of volunteers participating in the Chamber’s Ambassador program in order to leverage their enthusiasm to engage new and renewing members while tapping into their expertise and willingness to help with various events and programs. Consider other opportunities to build internal capacity including accessing practicum students or CO-OP students from UBC Okanagan and Okanagan College.

## ***Strategy 1.7 – ENHANCE CROSS VALLEY INITIATIVES SUCH AS THE VALLEYWIDE BUSINESS EXPO TO PROVIDE MORE B2B OPPORTUNITIES FOR CHAMBER MEMBERS***

The Chamber should build on the success it has achieved in partnering with other Chambers in the Okanagan on the Annual ValleyWide (B2B) Business Expo.

## **Goal # 2: BE THE LEADER IN ADVOCATING FOR A BETTER ECONOMIC ENVIRONMENT WHILE ENTRENCHING OUR POSITION AS THE VOICE OF BUSINESS IN KELOWNA AND THE OKANAGAN**

### **Context**

There are few chambers in BC that are as active on the policy and advocacy front as the Kelowna Chamber. However, recognizing that the board wishes greater emphasis on adding value to members (as a means to grow membership), the Board has identified that maintaining the current momentum and focus in this area will be sufficient for the term of this plan. With that said, the Kelowna Chamber already has significant credibility in this area, a reputation that will be protected going forward.

In the current environment, organizations such as Chambers and Boards of Trade in the Okanagan are struggling, both financially and with membership and advocacy. The discussion on this strategic topic was centred around the opportunity and/or value in developing shared service models with other Chambers. The Board believes that the top priority must be on serving our members and the Kelowna and area business community and that nothing should be undertaken which might put that priority at risk.

### **Strategy 2.1 – BUILD ADVOCACY PLANS AROUND ALL ACTIVE POLICY POSITIONS**

Continue to advocate on current high priority issues including removal of the speculation tax, a reduction in fees and charges related to housing (i.e., DCCs), accelerating regional transportation planning and infrastructure investments (i.e., the upcoming commercial goods study), and pushing for support in the areas of mental health, homelessness, and addictions.

### **Strategy 2.2 - ENGAGE MEMBERS DIRECTLY ON POLICY ISSUES THROUGH AN ANNUAL POLICY DEVELOPMENT FORUM AND REGULAR COMMUNICATIONS THAT SEEK THEIR OPINIONS**

Continue to hold a member-only policy development forum to engage members in deeper discussions on what is keeping them up at night. Survey on specific issues with regular frequency (monthly) to increase the level of engagement with members (i.e., Question of the week or month).

### **Strategy 2.3 - CONTINUE TO SET THE PACE IN DEVELOPING AND TABLING POLICY RESOLUTIONS AT THE BC AND CANADIAN CHAMBERS**

The Board has noted the need to maintain its capacity and involvement with policy and advocacy. They desire the Chamber to develop and table a minimum of three policy resolutions each year on issues important to members that are of provincial and/or national significance.

## ***Strategy 2.4 - ENCOURAGE AND SUPPORT LOCAL ECONOMIC DEVELOPMENT ORGANIZATIONS AS THEY BUILD COVID-19 ECONOMIC RECOVERY PLANS***

There are several initiatives that the Kelowna Chamber is involved with that impact the economic well-being of members and the business community, both in the short- and long-term. In its position as a leading non-governmental organization, the Chamber is well positioned to channel its advocacy through local economic development agencies to accelerate economic recovery from COVID-19 and shape a positive economic environment in the long term. The Chamber's participation in the COEDC's COVID Response efforts is an example of this type of collaborative action. It will be important for the Chamber to define its role in these efforts: leading when needed, partnering when appropriate and simply supporting when required.

## ***Strategy 2.5 – STRENGTHEN THE RELATIONSHIP WITH WESTBANK FIRST NATION (WFN) BY IDENTIFYING AREAS OF COLLABORATION AS A MEANS OF HELPING BOTH ORGANIZATIONS ACHIEVE THEIR STRATEGIC GOALS***

The Board recently added an advisory position to the Board from WFN, however there is an identified need to build on that relationship tapping into the experience of the BC Chamber and other Chambers which have established strong and respectful relationships with local Indigenous communities. This effort would align with economic reconciliation with Indigenous Peoples that is an identified priority of both the BC and Canadian Chambers which of course the Kelowna Chamber is a part of.

## ***Strategy 2.6 – SEEK OUT PARTNERSHIPS WITH LOCAL COMMUNITY ORGANIZATIONS TO MUTUALLY ADDRESS KEY ECONOMIC DEVELOPMENT ISSUES SUCH AS FUTURE LABOUR FORCE NEEDS***

The City of Kelowna's Economic Scorecard (2019) identified several areas where the city is behind its peers. This economic scorecard provides an evidence-based view of Kelowna's performance in comparison to 16 other North American and international cities. With an aging demographic, attracting youth and a diverse population will be vital in addressing long-term labour force needs, and this need represents an area where the Chamber could play a critical role.

## ***Strategy 2.7 – BUILD AND ENHANCE CROSS VALLEY INITIATIVES SUCH AS THE VALLEY POLICY ALLIANCE AND COVID-19 RESPONSE (OK WE GOT THIS)***

The Chamber should build on the success it has achieved in partnering with other Chambers in the Okanagan on initiatives such as the Valley Policy Alliance and the recently created COVID Response Coalition (#OKWeGotThis).

## ***Strategy 2.8 – CONTINUE TO BE A LEADER/FACILITATOR OF COLLABORATION WITH OTHER CHAMBERS IN THE REGION***

Kelowna should be ready to quickly and efficiently reach out to those Chambers which might be struggling to provide support, however, only if it does not adversely impact the Kelowna Chamber's sustainability. Develop a standby plan to ensure services can be offered to other Chambers and their members if they need some assistance remaining sustainable through the pandemic

## **Goal # 3: DETERMINE THE FUTURE OF THE CHAMBER'S BUILDING**

### **Context:**

The current 10-year property lease on which our building sits expires in 2026 and action over the next year is needed to determine the Chamber's future at the current site. While the Chamber owns the building, it leases the property from the City of Kelowna which has a 30-year head lease with the Province which also expires in 2026. There are current capital improvements needed, some of which are relatively large cost items such as the HVAC units that are reaching the end of their lifecycle, which must be evaluated in the short term. The building may be much larger than required for our operations. We have leased out part of the building in the past but since our last tenant left have been unable to lease it out. The City of Kelowna has advised that any other occupant must be another non-profit, approved by the City. On a positive note, we were successful in reducing our property taxes after the last tenant left. If we either choose not to sign a new lease or are unable to, it would take considerable lead time to build or lease appropriate space for our operations. A decision must be made in this planning cycle (by 2022).

### **Strategy 3.1 – ENLIST BOARD MEMBERS TO EXAMINE THE OPTIONS FOR THE FUTURE OF THE BUILDING/OFFICE LOCATION.**

Strike a task force to determine the appropriate strategy for the upcoming lease period ending on the building (2026) and the required capital expenditures in the interim. This task force must consider:

- The value of the building as a service to members. Do members use it? Does the building itself add value to members? Is there brand value in it? What are the operational needs for staff use?
- What is the process with the City and the Province to determine what is likely to happen in 2026?
- During COVID we have been able to work remotely. Doing more of that may be an option for the future.
- Use the planned member research to develop an understanding of member value in the building.

### **Strategy 3.2 – WORK WITH THE FINANCE COMMITTEE TO DETERMINE A FINANCIAL STRATEGY TO MAINTAIN AND IMPROVE THE INTERIOR AND EXTERIOR OF THE BUILDING.**

Regardless of the discussions by the Task Force noted above, we expect to be in the current location at least until 2025 and that means minor capital improvements will need to be considered to ensure the building doesn't fall into disrepair.

### **Strategy 3.3 – ESTABLISH A VOLUNTEER WORKING GROUP OF BOARD MEMBERS, AMBASSADORS OR MEMBERS THAT WILL HELP TO IMPROVE THE INTERIOR OF THE BUILDING WITH A FOCUS ON THE FRONT ENTRANCE.**

Since the departure of Tourism Kelowna, the front entrance of the building has been cleaned up a bit but remains in flux and does not give the greatest impression to visiting members, potential members, or dignitaries. The cost to contract someone to improve the front entrance would likely be significant and would be a low priority during budget discussions. It is thought that a volunteer working group with construction skills might be able to help address this issue.

## STRATEGIC GOALS, OBJECTIVES, AND PROGRESS INDICATORS

<b>GOAL # 1: GROW MEMBERSHIP BY STRENGTHENING THE CHAMBER'S VALUE PROPOSITION</b>	
Recruit, engage, and retain members who represent a diverse membership base to ensure the continued credibility of the Chamber as the leading organization representing Kelowna's business community.	
<b>WE AIM TO:</b>	<b>HOW WE MEASURE SUCCESS:</b>
<b>Strengthen our retention plan and ensure it is among the best in the country</b>	<ul style="list-style-type: none"> <li>○ The plan has been thoroughly reviewed by staff and changes have been implemented by end of the current Board's Term (March 2021).</li> <li>○ Retention rate long term (post COVID) is at or above our peers with 85% target. (Measured and reported annually starting Q2 2022)</li> <li>○ Our membership revenue will exceed that of any other peer Chamber in Canada with growth in revenue in each membership Tier. (Measured and reported annually starting Q2 2021)</li> <li>○ Our penetration rate (members/business licenses) is equal to (or better) than our identified peers and our own historical benchmark. (Measured and reported annually starting in Q2 2021)</li> </ul>
<b>Review and enhance current programs to ensure they align with the quadrants (segmentation) of membership.</b>	<ul style="list-style-type: none"> <li>○ Each signature program has identified the specific target market it is aimed at and post event reports are provided to Member Care Committee. (Reported to Member Care Committee within month after the conclusion of each Signature event)</li> <li>○ Where gaps exist, new and sustainable programs are being developed either in partnership with others or as a standalone initiative of the Chamber (i.e., newcomers in business and/or Okanagan Young Entrepreneurs, Chamber B-Corps, Green Chambers, etc.). (Recommendations for new programs considered by the Board as part of annual budget discussions starting in November 2021)</li> <li>○ Key sectors of the economy have been identified and programs are being developed that are aimed at bringing those sectors together under the Chamber umbrella. (Research has been completed and reported to Member Care by November 2021)</li> </ul>

<p><b>Position the Chamber as the “go to” organization for local business intel.</b></p>	<ul style="list-style-type: none"> <li>○ Kelowna has been accepted as a BC MindReader Community Champion with specific local data being collected and utilized to inform the local business community. (By end of 2021)</li> <li>○ A monthly economic indicator report using Stats Canada/MindReader data has been developed for the Okanagan (Kelowna CMA) and is being promoted through the Chamber network. (By end of 2021)</li> <li>○ A business leadership advisory group has been evaluated and the business case informs the 2021 budget discussions and decisions. (By end of 2021)</li> </ul>
<p><b>Examine options to make our directory more robust and make access to it easier for members/non-members.</b></p>	<ul style="list-style-type: none"> <li>○ A pilot project around the production of a membership directory/relocation guide has been undertaken with identified measurables in place to evaluate. (By end of Q2 of 2021)</li> <li>○ Improvements have been made to our online directory to better showcase our members. (by end of 2022)</li> <li>○ A chamber app has been developed and has significantly enhanced members’ access to our products and services. (By end of 2023)</li> </ul>
<p><b>Develop a revitalized marketing strategy (plan).</b></p>	<ul style="list-style-type: none"> <li>○ A new marketing strategy is in place that includes targeting specific demographics such as business students at UBC (Faculty of Management/Okanagan School of Business as part of means to grow number of members. (By end of Q2 2021)</li> <li>○ Find ways to make our current members our best advocates through a comprehensive testimonial and referral strategy. (By end of Q1 2021)</li> <li>○ Uses curated data on current and past members to identify opportunities to “win-back” members who may have been a part of the network in the past and use that information to entice them to re-join. (By end of Q3 2021)</li> </ul>
<p><b>Build capacity using volunteers, practicum students, CO-OP students and through the creation of intern positions.</b></p>	<ul style="list-style-type: none"> <li>○ The number of chamber ambassadors has doubled, and their terms of reference has been updated giving them more responsibilities (added scope). (By end of 2021)</li> <li>○ A practicum student has been secured each spring to assist with administrative issues (i.e., OC Administrative Professionals program). (By end of Q2 2021)</li> <li>○ The Kelowna Chamber annually takes on CO-OP students to assist with various member programs, marketing, and research. (Plan in place by end of Q3 2021 with implementation in 2022)</li> <li>○ Several Intern positions have been developed and have been filled. (By end of 2023)</li> </ul>

<p><b>Enhance cross valley initiatives such as the ValleyWide Business Expo to provide more B2B opportunities for business members.</b></p>	<ul style="list-style-type: none"> <li>○ The Chamber should build on the success it has achieved in partnering with other Chambers in the Okanagan on the Annual ValleyWide (B2B) Business Expo. An enhanced series of B2B expos should be explored. (By end of 3<sup>rd</sup> quarter of 2021 to allow for 2022 budget considerations)</li> </ul>
<p><b>GOAL # 2: BE THE LEADER IN ADVOCATING FOR AN IMPROVED ECONOMIC ENVIRONMENT WHILE ENTRENCHING THE CHAMBER’S POSITION AS THE VOICE OF BUSINESS IN KELOWNA AND THE OKANAGAN</b></p>	
<p>Continue to lead the region in advocacy while sustaining our role as a collaborative partner in enhancing the economic environment of the city, region, and province.</p>	
<p><b>WE AIM TO:</b></p>	<p><b>HOW WE MEASURE SUCCESS:</b></p>
<p><b>Build advocacy plans around all active policy positions</b></p>	<ul style="list-style-type: none"> <li>○ Well articulated advocacy plans are in place for current priority issues including removal of the speculation tax; a reduction in fees and charges related to housing (i.e., DCCs); and accelerating regional transportation planning (i.e., commercial goods study). (By end of Q3 2021)</li> <li>○ The Chamber/members are involved in efforts to improve safety, expand mental health support for those in need, and progress is being made in creating a safe and healthy downtown (community). (Measurables/Indicators to be developed by end of Q3 2021)</li> </ul>
<p><b>Engage members directly on policy issues through an annual policy development forum and regular communications that seek their opinions on important issues.</b></p>	<ul style="list-style-type: none"> <li>○ A member policy development forum is held each year that engages members in discussions on “what is keeping them up at night”. (Operationalized)</li> <li>○ Members (&amp; business community) are surveyed on a regular basis (monthly) to increase the level of engagement and identify emerging issues. (Plan in place to manage this initiative by end of Q1 2021)</li> </ul>
<p><b>Continue to set the pace in developing and tabling Policy Resolutions at the BC and Canadian Chamber</b></p>	<ul style="list-style-type: none"> <li>○ Capacity and involvement in advocacy efforts for members is being maintained while ensuring a minimum of three policy resolutions are developed each year on issues important to members that are of local, provincial, and national significance. (Operationalized)</li> </ul>
<p><b>Encourage and support local economic development organizations as they build COVID-19 economic recovery plans.</b></p>	<ul style="list-style-type: none"> <li>○ A regional economic summit has been held in partnership with economic development agencies in the region and with the support of Chamber members with expertise in this area. (By end of Q2 2021)</li> </ul>

	<ul style="list-style-type: none"> <li>○ The Chamber is well represented on any task force or working group that is tackling economic recovery in the city and region. (Operationalized)</li> </ul>
<p><b>Strengthen the relationship with Westbank First Nation (WFN) by identifying areas of collaboration to help both organizations achieve their strategic objectives.</b></p>	<ul style="list-style-type: none"> <li>○ A well-defined agreement is in place that outlines how the Chamber and WFN’s Economic Development Commission will work together for the mutual benefit of both organizations and their members. (By end of Q1 2022)</li> </ul>
<p><b>Seek out partnerships with local community organizations to mutually address key economic development issues such as future labour force needs.</b></p>	<ul style="list-style-type: none"> <li>○ A decision has been made and resources are in place to undertake an update on the City of Kelowna’s Inaugural Economic Scorecard (2019) to measure progress in addressing areas of deficiency which were identified. (by end of Q1 2021)</li> <li>○ Several initiatives are being undertaken by the Chamber in partnership with other community organizations to address some of the issues identified in the Economic Scorecard. (As reported to the Board by end of Q3 2021)</li> </ul>
<p><b>Build and enhance cross-valley Chamber initiatives such as the Valley Policy Alliance, ValleyWide Business Expo, and COVID-19 Response Coalition (OK We Got This)</b></p>	<ul style="list-style-type: none"> <li>○ The Chamber has taken a leadership role in building the capacity of the Valley Policy Alliance. (Options report presented to the Board by end of 2021)</li> <li>○ The Annual ValleyWide (B2B) Business Expo has doubled in size. (By Q2 2023)</li> <li>○ The Okanagan Chamber’s COVID Response Coalition (#OKWeGotThis) is the go-to organization in the region to access information, celebrate business resiliency and to promote the benefits of buying local. (Indicators in place by end of Q2 2021)</li> </ul>
<p><b>Continue to be a leader/facilitator of collaboration with other Chambers in the region.</b></p>	<ul style="list-style-type: none"> <li>○ A standby plan is in place to ensure services can be offered to other Chambers and their members if they need some assistance in being sustainable through the pandemic. (Plan outline to board by end of Q3 2021)</li> <li>○ Regular Board to Board communication is scheduled in order to allow sharing of challenges and the provision of support to complement what is occurring at the operational level. (Schedule for discussions among Valley Chambers EDs/Board Chairs to be established by end of Q3 2020)</li> </ul>

## GOAL # 3: DETERMINE THE FUTURE OF THE CHAMBER'S BUILDING/OFFICE NEEDS

Plan for the future of our building (or its replacement) as it approaches the end of the lease period (2026) while also considering the effectiveness of our recent move to virtual work.

<p><b>Engage Board Members to examine the options for the future of the building/office location.</b></p>	<ul style="list-style-type: none"> <li>○ A Board Task Force has been struck and has recommended an appropriate strategy for dealing with the end of the property lease with the City that concludes in 2026. In undertaking its work, the group has considered:               <ul style="list-style-type: none"> <li>● The value of the building as a service to members.</li> <li>● What are the operational needs for staff use?</li> <li>● What plan does the City/Province have for site?</li> </ul> </li> </ul> <p>(Task Force is established no later than end of Nov 2021 with adopted TOR in place)</p>
<p><b>Work with the Finance Committee to develop a short-term financial plan to maintain and improve the interior and exterior of the building.</b></p>	<ul style="list-style-type: none"> <li>○ A plan is in place that prioritizes what improvements are needed and provides adequate financial resources to undertake those minor capital improvements that are deemed necessary. (Finance Committee to add this as an agenda item for discussion/action by end of 2020)</li> </ul>
<p><b>Establish a volunteer working group that will help improve the interior/exterior of the building with a focus on the front entrance.</b></p>	<ul style="list-style-type: none"> <li>○ A working group has been recruited and is undertaking and coordinating physical improvements to the front entrance and other priority areas as identified. (Working Group in place by end of Q2 2021)</li> </ul>

## ADDITIONAL NOTES

1. The Kelowna Chamber has been in existence for more than a century and has gained a great deal of knowledge and experience over those years. In moving forward, it will acknowledge previous strategic planning efforts and look to continually recognize and celebrate its history and those who have contributed to its success. 2021 marks the Chamber's 115<sup>th</sup> Anniversary.
2. This document establishes the priorities of the Board of Directors and will inform and shape the organization's business plan for 2021 and beyond. The organizational structure will be adjusted if required to best respond to the stated priorities and staff work plans will contain specific tasks that will lead to the objectives noted within this plan.

3. It is important to recognize that many previous strategies have now been fully operationalized including:
  - ✓ All Chamber events/programs are annually evaluated to better manage and determine if new programs should be pursued.
  - ✓ The Board is fully aware of what programs we are running and that they are both sustainable and in alignment with our mission (mandate). Regular reporting on programs and events is provided to Member Care Committee and the Board for review.
  - ✓ The Chamber is involved with/engaged in all discussions on economic issues in the city and region. The Board/Chamber plays a significant role in the Annual Business Walks each fall. The Board/Chamber plays a significant role in engaging members during BC Chamber Week each spring and the Board is represented and actively involved with the COEDC and on the YLW Community Advisory Council.
  - ✓ We measure over time the satisfaction of members with the programs we deliver, the advocacy we undertake on their behalf, and their perceptions of the organization as being indispensable. An annual membership satisfaction survey occurs each fall and the results are provided to the Board.
  
4. The Chamber has already completed numerous initiatives which were identified in previous strategic plans including but not limited to the following:
  - ✓ Enhanced Board Room AV (in conjunction with new carpet/interior upgrades).
  - ✓ Re-established member orientation session(s).
  - ✓ Partnered with KCR on Ignite Employment Forum in 2019 & 2020.
  - ✓ We have been reaccredited (with distinction) by the Canadian Chamber Accreditation Council.
  - ✓ The Board through the Executive Committee has reaffirmed and/or added Appointees to the Board.
  - ✓ The revised Chamber Bylaws have received Ministerial approval (Industry Canada).
  - ✓ The Board Policy Manual has been reviewed and approved by the Board of Directors.
  - ✓ A Board Development Committee has been established and developed an education and succession plan.
  - ✓ The Chamber is seen as a leader in ensuring gender balance on the board and strong representation from different ethnic and cultural backgrounds.

There are also a few lingering initiatives that have not yet been fully dealt with including:

- Assess opportunity to partner with Okanagan College in providing leadership training.
- Refresh the Chamber's website
- Undertake a competitive cost benefit of the Chamber's current CRM system and confirm continued use of the platform.
- Determine possible interest in KCC hosting BC or Canadian Chamber AGM.
- Assess value of "code of conduct" for members as mandatory component of membership.

(END)