

FAQs

Why does Kelowna need an Economic Scorecard?

Charting a pathway to success requires facts. The vision of Kelowna as “the best mid-sized city in North America” is an ambitious goal. To achieve that, those working in planning and business initiatives need hard facts to plan forward. A periodically published data-driven report is an important tool in the planning work kit.

What were the results?

The full Scorecard reports on 24 indicators grouped into two categories: Economic & Social. Kelowna achieved an overall average score of 10th among 17 cities. Kelowna scored higher in the Economic category (6th place) than in the Social category (14th place). Letter grades were assigned to each city in the study: 7 in Canada; 5 in the US; and 5 internationally. The Scorecard identified 13 indicators where Kelowna could seek improvement. A full summary can be found in the Scorecard Appendix A.

Are there any priority areas that need attention?

Yes. The Task Force identified three priority areas for future action: Housing Affordability and Access; Population Diversity; Youth Retention.

Who did all the work?

The Task force was made up of about 25 organizations and individuals. All made contributions of time, planning, oversight, writing, and determining the methodology. Primary among those doing the legwork were Dr Lynn Sparling, Chair of Business Administration, Okanagan College, and a cohort of business students at the School, who were paid an honorarium for their work. Essentially, the Scorecard was an unremunerated task for those involved. Dr Heather Banham, Dean (retired) Okanagan School of Business also contributed many hours of unpaid labour to move the project forward. Robert Fine, Director of Business and Entrepreneurial Development, City of Kelowna, supplied the impetus to get to the finish line. Dan Rogers, Executive Director, Kelowna Chamber of Commerce is looking after next steps.

What data was used?

Data was gleaned from multiple sources, and a full index in the Scorecard lists those sources that made the final list. 71 data sources include information from disparate information banks including the World Health Organization, US Census, Invest Victoria, Ministry of Social Development New Zealand, City of Spokane, Canadian Medical Association, CBRE, and numerous municipal, provincial, state and country data collecting agencies, among others.

How long did it take?

About 18 months from inception of the idea – recommended by Tim Manning, Governor, Greater Vancouver Board of Trade through to outlines, defining methodology and identifying cities with an adequate number of comparable data streams and reliability.

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What cities did the Task Force select when comparing to Kelowna?

Seven in Canada; 5 in the US; and 5 internationally. The full list includes:

AMERICAN CITIES

Ann Arbor, Mich.
Boulder, Colo.
Charleston, S.C.
Eugene, Ore.
Spokane, Wash.

INTERNATIONAL CITIES

Cork, Ireland
Glasgow, Scotland
San Sebastian, Spain
Townsville, Australia
Wellington, New Zealand

CANADIAN CITIES

Fredericton, N.B.
Kelowna, B.C.
Niagara Region, Ont.
Red Deer, Alta.
Saskatoon, Sask.
Victoria, B.C.
Waterloo, Ont.

How will the Scorecard be used?

The intention is to use the results of this report card to develop new initiatives to address areas where Kelowna can improve. It is important however, that these new initiatives complement activities already underway.

How often will the Scorecard be updated?

The plan is to update the scorecard in three years, in order to receive feedback; measure Kelowna's progress on the indicators; and to help stakeholders assess and adjust their initiatives.

What methodology was used?

The Scorecard compares 24 indicators divided into Economic (12) and Social (12). Social indicators were included primarily because of the influence they have on a community's ability to attract new residents and investments. This, in effect, makes them economic indicators. Care was taken to ensure the same data definitions were used for each city. Problematic surveys were those with good data, but without comparable data studies in the other cities selected. Also, regional data was rejected in nearly all cases as this is a city-

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specific survey. As it was difficult to collect data on all 24 indicators for every city, there is a range in the number of cities included for each of the indicators.

Where can I find the full report?

www.kelownachamber.org/scorecard

The Kelowna Chamber of Commerce website is where the report can be accessed and where information about the project will be housed going forward. The file will be available after February 11, 2019.

What kind of indicators were examined?

Real GDP per capita; Unemployment rate; Office space vacancy rate; Building permits per capita are some of the Economic indicators. Social indicators included among others: Housing affordability; Cultural occupations; Immigrant population; and Income inequality, an interesting indicator which uses the Gini coefficient.

How did Kelowna rank?

Overall, Kelowna received a passing ranking of 10th out of 17 cities surveyed worldwide. On individual indicators, Kelowna scored an “A” or a “B” in 11 categories; and a “C” or a “D” (needs work) in 13 categories.

What were the high and low indicators for Kelowna?

At the top end of the scorecard, Kelowna received three A grades (income inequality, self-employed in labour force, and total value of building permits per capita). At the bottom end, Kelowna received five D grades (proportion of population with at least a post-secondary degree-diploma; non-visible minorities as a percentage of population; real GDP per capita; high tech employment share; and disposable income per capita). The three highest scoring cities overall were Boulder, Colorado; Ann Arbor, Michigan; and Victoria, British Columbia.

Who can I speak to about the data?

Robert Fine, Director of Business and Entrepreneurial Development, City of Kelowna.

What are the next steps?

The hope is that stakeholders will use the scorecard and its data to inform their economic and social initiatives. After sharing the report with community organizations, educational institutions, and other interested stakeholders, the Working Group looks forward to hearing back about the usefulness of the Scorecard, and how to re-engage for a newly revised report in 2022.

Who will take those next steps?

In concert with organizations and institutions who are using the data, the next steps will be led by the working group made up of the Kelowna Chamber of Commerce, the City of Kelowna, Okanagan College, and UBC Okanagan. The lessons learned through this process and through engagement with other community leaders and organizations, will help the working group establish a framework for the next economic scorecard in 2022.

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How can I provide feedback?

Organizations and individuals may provide feedback to:

communication@kelownachamber.org.

The Scorecard identifies thirteen indicators where Kelowna can seek improvement. What's next?

The Task Force identified three priority areas out of the thirteen for future action. While the intention of the Scorecard is to develop new initiatives to address areas for improvement, it is important that new initiatives complement activities already underway. The three priority areas and some key activities underway include:

HOUSING AFFORDABILITY AND ACCESS

- Healthy housing strategy – 19 identified actions
- By-law updates to allow for supportive housing
- Tax incentives to encourage construction of multi-builds

IMMIGRATION AND DIVERSITY

- Central Okanagan Local Immigration Partnership established (2014) – makes Kelowna more welcoming & provides more opportunities, especially in the labour market
- Immigration Services Department – Kelowna Community Resources provides support services for immigrants, newcomers, refugees, temporary workers and international students
- Recruitment by UBC Okanagan and Okanagan College – connecting graduates with local career opportunities

YOUTH RETENTION

- Innovation Centre offering space and support services
- Okanagan Young Professional Collective creating a dynamic and engaged culture for young professionals

What partners are in the Working Group?

1. Okanagan School of Business
2. City of Kelowna
3. Kelowna Chamber of Commerce
4. University of British Columbia Okanagan Faculty of Management

Who is on the Economic Scorecard Task Force?

1. Phil Ashman – Regional Dean for Central Okanagan – Okanagan College
2. Lianne Ballantyne – President & CEO – Tourism Kelowna
3. Mark Betteridge – Founder – Discovery Parks
4. Brad Dahl – Regional Film/TV Industry Analyst

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5. Laurel Douglas – CEO – Women’s Enterprise Centre
6. Carmen Sparg – President – Kelowna Chamber of Commerce
7. Tom Dyas – Past President – Kelowna Chamber of Commerce
8. Derek Gratz – Associate Director – UBC Okanagan University Industry Liaison Office
9. Corie Griffiths – Director – Central Okanagan Economic Development Commission
10. Lynn Heinrich - Marketing and Business Development Manager – Sun-Rype Products Ltd.
11. Thom Killingsworth – Executive Director – Kelowna Yacht Club
12. Vianne Kintzinger – Assistant Superintendent – School District 23
13. Tom Konek – Councillor – Westbank First Nation
14. Chris Mazurkewich – Past CEO, Interior Health
15. Gary Pearson – CEO – Natures Formulae
16. Dr. Lynn Sparling – Chair of Business Administration – Okanagan College
17. Ben Stewart – MLA for Kelowna West
18. Grant Stevens – Vice President of Corporate Services – KF Aerospace
19. Renee Wasylyk – CEO – Troika Developments
20. James Weir – Consultant – Investors Group Financial Services
21. Larry Widmer – General Manager – Community Futures Development Corporation Central Okanagan

Who is Dr Lynn Sparling?

Chair of Business Administration, Okanagan College

Doctorate in Business Administration (DBA); MBA, B. Comm (hons); CPA, CMA designation

Teaching Experience: Business Research Methods, Management Science, Entrepreneurship, Management Science, Management Accounting

Accomplishments: Publication of thesis and articles in peer-reviewed journals on the adoption of e-commerce by SMEs in the Central Okanagan. Conducted and presented research relating to women entrepreneurs in BC at national and international conferences.

Expertise Areas: Business Research, Women Entrepreneurs, Strategic Management, Management Accounting

Associations and Board Memberships:

- Canadian Council of Small Business and Entrepreneurship Board member
- Chair, CPRC Faculty of Business

Who is Dr Heather Banham?

Dean (ret’d) Okanagan School of Business

B. Bus. (Acctg.), University of Southern Queensland; C.P.A. (Australia); M.B.A. (Asia Pacific International Graduate School of Management); Doctor of Business Administration (DBA) in Human Resource Management University of Southern Queensland (USQ); F.C.P.A., F.C.G.A. Fellow Chartered Professional Accountants of Canada

Expertise Areas: Accounting, Finance, Small Business

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Professional Activities:

- Certified General Accountants of British Columbia, Board of Directors, 2011, 2012, 2013 and Chair of CGA Education Appeals Committee 2011; Chair of Discipline Committee, 2012 and 2013
- Leadership Workshops for the Canada West Ski Areas Association annual conference in Kelowna BC May 2008, May 2009 – co-presented with Dr. Sherry Price
- Canadian Council for Small Business and Entrepreneurship (CCSBE) - Conference Co-Chair 'Connecting Policy Practice and Research' November 2007, Kelowna BC
- Reviewer for research articles submitted to the Academy of Management 2006, 2007, 2009
- Reviewer for research articles submitted to the Canadian Council for Small Business and Entrepreneurship 2006
- Moderator for research presentations at the Canadian Council for Small Business and Entrepreneurship September 2006
- Educational Advisory Board, Certified General Accountants Association of British Columbia, Board Member 2003, 2004, 2005, Chair 2006, 2007, 2008, 2009, 2010
- Business Educators Articulation Committee, Chair 2004
- Commerce Articulation Committee, Chair 2005
- Conference Co-Host (with Edie Stolwijk, Chair, Applied Business Technology, Okanagan University College), combined Business Educators Articulation Committee and Commerce Articulation Committee of British Columbia 2003
- Presentation on joint Business and Commerce Articulation Conference to British Columbia Council on Admissions and Transfer (BCCAT), Chairs and System Liaisons annual conference February 2004 (Joint presentation with P. Shanahan, University of British Columbia)
- British Columbia Director, Canadian Council for Small Business and Entrepreneurship, appointed to a two-year term, November 2004 – 2006

Who is Robert Fine?

Director of Business and Entrepreneurial Development, City of Kelowna. Robert Fine was born in Toronto. After completing a degree in Urban Economics from the University of Toronto and Masters work at York University, Robert brought innovative programming to the Association of Municipalities of Ontario including GASAMO, a \$35 million public gas-purchasing program under deregulation. He moved to British Columbia in 1989 where he worked for the Sea to Sky Economic Development Commission until 1996.

His many accomplishments included assisting in the development of Whistler which was named the number one ski resort in North America. In 1998, Mr. Fine was awarded "Economic Developer of the Year" by the Economic Development Association of British Columbia and the Bank of Montreal. He was named an honorary fellow by Okanagan College and was named the Kelowna Chamber of Commerce's Business Leader Award winner for 2009.

Robert served as Director of Economic Development for the Regional District of the Central Okanagan for almost 17 years. In March of 2015 he became the Director of Business and Entrepreneurial Development for the City of Kelowna. He is Past President of the Economic Developers Association of Canada, and past member of the Board of the International Economic Development Council. He is a past board member of the Provincial

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Small Business Roundtable, the John Howard Society, the Canadian Cancer Society BC Yukon and currently sits on the Board of the Kelowna Innovation Society. His new passion is as a board member with Sing For Life, a non-profit aimed at providing connection through music for dementia sufferers. He spends his free time singing the Great American Songbook all over the world with the 16-piece Dreamland Band. He has raised over \$125,000 for various charities through the sales of his five CDs.

Who is Dan Rogers?

Dan Rogers moved into the Executive Director position at the Kelowna Chamber of Commerce in June 2017. He had been in charge of the Greater Vernon Chamber of Commerce since 2014. Rogers has been instrumental in the expansion of Chamber-partnered programs with members, and with other Chambers of Commerce in the valley and around the province.

Currently, he is the President of the BC Chambers Executives Society. The BCCE offers education, resources, and networking support among managers of Chambers of Commerce and Boards of Trade in British Columbia. As well, he sits on the Executive Committee (?) of the BC Chamber of Commerce.

He was a broadcast journalist in Prince George with CFBG. He spent four terms as City Councillor and three years as Mayor before moving to Vernon. After moving to the Kelowna Chamber, Rogers continued his active interest in policy, while taking on the broader responsibilities of managing a larger operational staff of nine; a larger membership; multiple year-round events, an active governance board and committees, and working with what he defines as “one of Canada’s fastest-growing metropolitan areas, and a force to be reckoned with now, and in the future.”

For more information:

On the research, indicators and rankings: Dr Lynn Sparling
lsparling@okanagan.bc.ca/250-762-5445x4386

On the purpose of the Scorecard data: Robert Fine
rfine@kelowna.ca/250-469-8628

On what the Scorecard means; what the Scorecard will be used for; next steps in the work: Dan Rogers
dan@kelownachamber.org/250-469-7356

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