

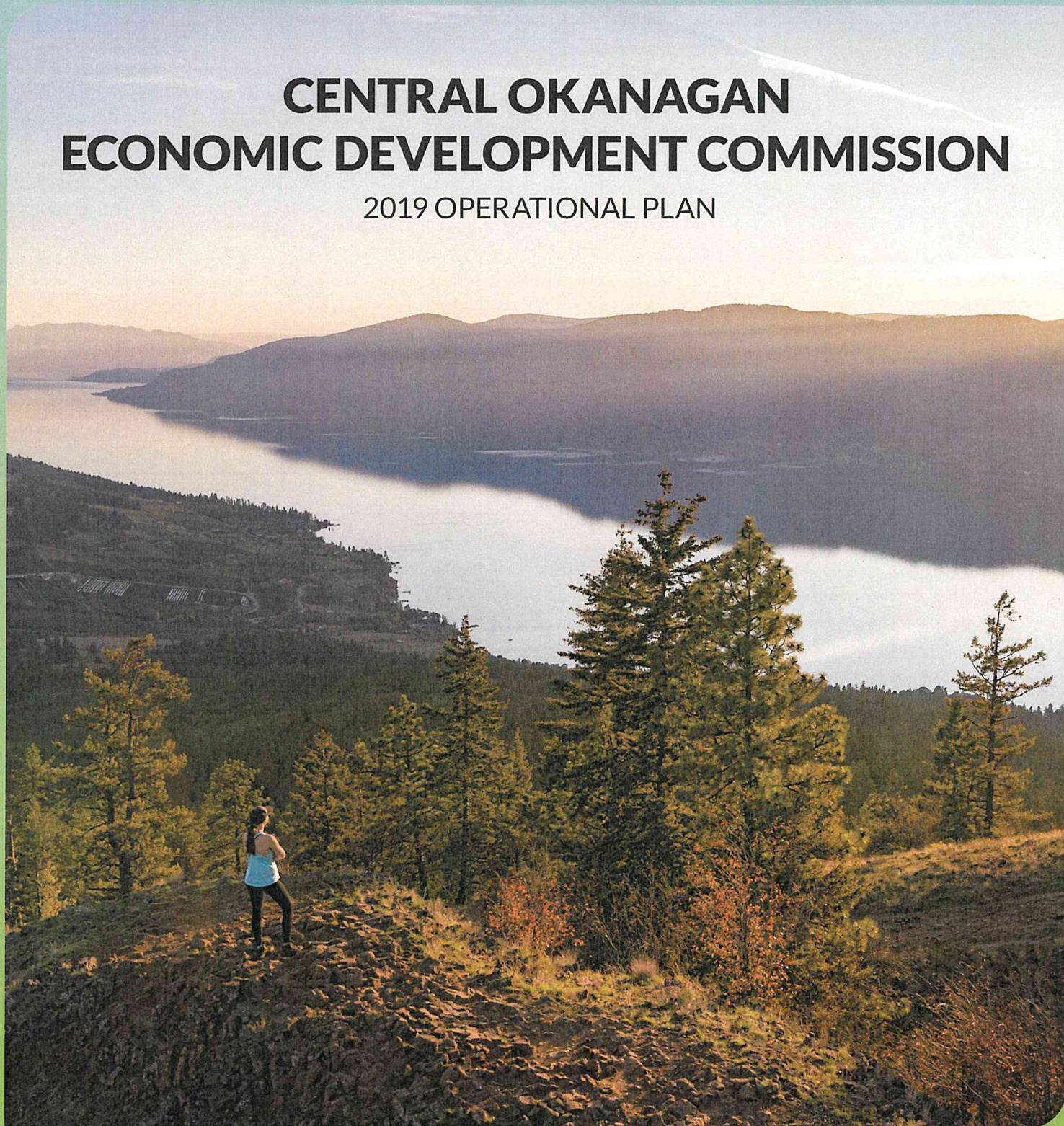


**CENTRAL  
OKANAGAN**  
ECONOMIC  
DEVELOPMENT  
COMMISSION



# **CENTRAL OKANAGAN ECONOMIC DEVELOPMENT COMMISSION**

2019 OPERATIONAL PLAN



The Region's Primary Business Resource | [investkelowna.com](https://investkelowna.com)



**Contents**

2019 One Page Strategic Plan ..... 2

Executive Summary..... 3

Message from the Director ..... 4

COEDC Advisory Council ..... 5

Strategy Rationale..... 7

Program Delivery ..... 9

    Business Retention and Enhancement ..... 9

    Investment Attraction..... 19

    Coordination & Connection ..... 27

## 2019 One Page Strategic Plan

### Central Okanagan Economic Development Commission Strategic Plan

#### Mandate:

Working in partnership, to facilitate and encourage the development of a healthy and dynamic sustainable community economy by supporting existing businesses and encouraging new business investment within the Regional District of Central Okanagan.

#### Top Regional Priorities

1. Increase awareness and profile of the Central Okanagan provincially/nationally/internationally as a destination for entrepreneurs, companies and skilled workforce
2. Enhance the environment for small and medium enterprise growth
3. Encourage economic growth in key sectors
4. Recruit and retain a skilled and stable workforce in the Central Okanagan

#### COEDC's Role to Achieve Priorities

1. Storytelling: Tell the business, research and career success stories of local businesses, residents and institutions to raise profile of region
2. Primary Resource for Business: provide 1:1 expertise and connection to local businesses. Gather and disseminate economic climate data and identify business support gaps
3. Identify and communicate value proposition of key industry sectors for FDI, business development and talent attraction
4. Enhance Labour Market Literacy in region and identify opportunities to support workforce recruitment and retention

#### Top Initiatives in 2019

	Completion
InvestKelowna.com refresh	Q2
Agriculture Asset Map	Q3
2020-2025 Strategic Plan	Q4
Central Okanagan Wage Survey	Q4
Identification of Cascadia Corridor opportunities	Ongoing
Enhanced regional "storytelling" initiatives	Ongoing
Expansion of OYP Collective programming	Ongoing

#### Metrics

	2018	2019 Target
Businesses visited/engaged (#)	113	150
Ambassador packages distributed	500	300
Unique website visitors (#)	15,110	15,000
Inquiries (#)	11,759	7,000
Referrals B2B, service provider (#)	404	300
Community engagement presentations	57	50

# 2019 COEDC Operational Plan

---

## COEDC MANDATE

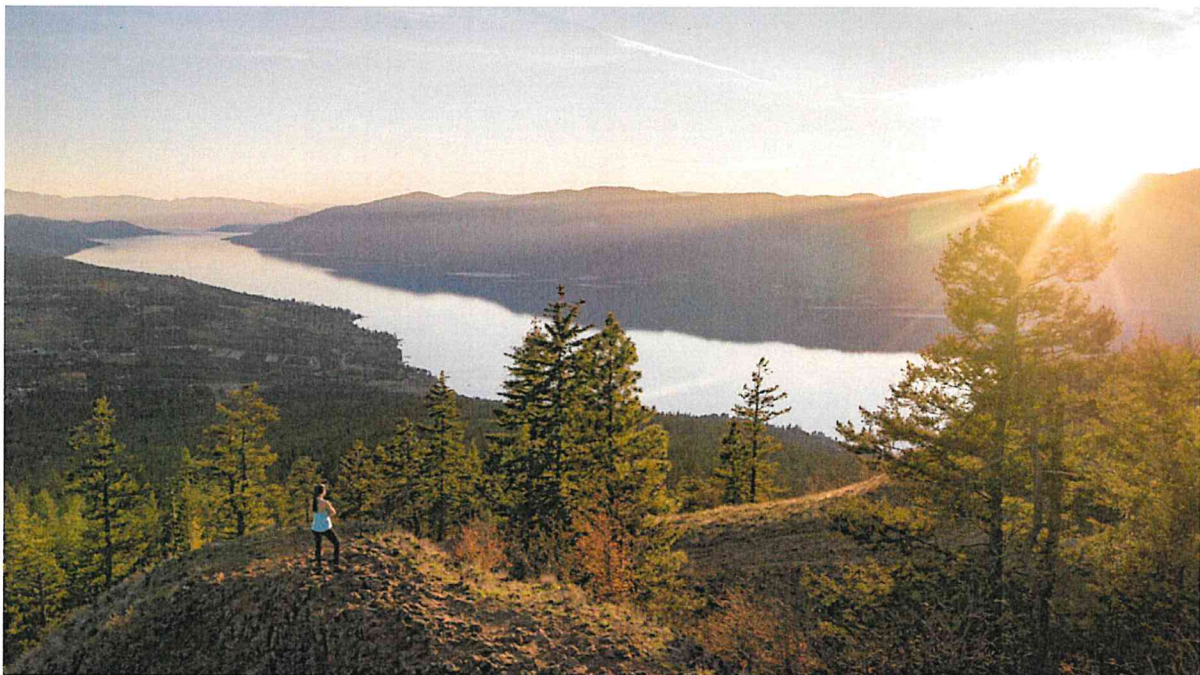
Working in partnership, to facilitate and encourage the development of a healthy and dynamic sustainable community economy by supporting existing businesses and encouraging new business investment within the Regional District of Central Okanagan.

## Executive Summary

The Regional District of Central Okanagan's Economic Development Commission (COEDC) is a service provided by the Regional District of Central Okanagan (RDCO), providing economic development services to the District of Lake Country, RDCO Electoral Area East, City of Kelowna, City of West Kelowna, Westbank First Nation, District of Peachland and RDCO Electoral Area West.

The COEDC reports on its activities to the Regional District of Central Okanagan Board of Directors through quarterly reporting and annual reporting mechanisms.

The publically available 2019 Operational Plan outlines the Commission's objectives, challenges and tactics developed to capitalize on the Region's economic opportunities within three primary programming streams— **Business Retention & Enhancement**, **Investment Attraction** and facilitating **Coordination & Connection**.







## Message from the Director

Dear Central Okanagan Community,

As Director of a regional function, you will often hear me say that the Central Okanagan Economic Development Commission seeks to “widen the pie” of economic prosperity in the Okanagan. That sentiment was strong in 2018 as the COEDC continued to strengthen relationships with our partners in local, provincial and federal government, post-secondary institutions, community stakeholders, and local industry. As a region, the Central Okanagan continues to be one of the fastest growing and most diverse local economies in Canada. The region’s culture of collaboration and partnership is a key ingredient in that growth.

The Central Okanagan is not only experiencing record population growth, we are outpacing the province in growth of businesses by employee size, with businesses of 20-49 employees growing at more than double the provincial average. In 2018, examples of the region’s growth are demonstrated throughout the increased economic impact of multiple industries and economic indicators including technology enabled businesses currently [contributing \\$1.67 billion](#) to the regional economy, [18% of BC’s Aerospace Companies](#) located in the Central Okanagan and the region serving as a hub for [Agricultural Research and Innovation](#).

As the Region’s Primary Resource for Business, the COEDC is proud to tell the story of the region’s growing economy and businesses through resources like the [2018 Economic and Industry Profiles](#), sector studies in aerospace, agriculture, technology and more.

With the economic growth we are experiencing comes challenges, from space constraints to global talent shortages to infrastructure pressures. In 2019, the COEDC will continue intensive outreach to our business community to identify pressures and connect to resources. In this Operational Plan you will see enhanced workforce development initiatives, business development programming to help local industries capitalize on global opportunities and prepare for a changing business landscape and a new 2020-2025 Strategic Plan to guide the Commission’s activities into the next era of economic prosperity in the Central Okanagan.

On behalf of the COEDC team, we look forward to continuing to serve the Central Okanagan as the region’s primary business resource.

Best Regards,

A handwritten signature in black ink, appearing to read 'Corie Griffiths'. The signature is stylized with a large 'C' and 'G'.

Corie Griffiths

## COEDC Advisory Council

In addition to the Regional District of Central Okanagan Board, to which the COEDC is fully accountable, the COEDC utilizes the expertise of a 40+ member advisory council that includes representatives of business associations, local government, and key industry leaders of Agriculture, Advanced Manufacturing, Professional Services, Construction & Development, Technology and Tourism. The Advisory Council acts as a conduit of community and business information, providing staff with the ability to identify tactics, activities and partnerships in order to facilitate a healthy, dynamic and sustainable community economy.

### Directors Serving on the Executive

Lynn Heinrich, Chair	Brad Klassen, Vice Chair	David McDougall, Past Chair		
Alex Greer	Mike Checkley	Aura Rose	Terry Edwards	James Calissi

### Directors Representing Industry Sectors

Jeremy Burgess	Pushor Mitchell LLP, Lawyer	Professional Services/Law
Scott Butler	Highstreet Ventures, President	Construction/Development
James Calissi	Calissi Farms, Owner	Agriculture
Mike Checkley	QHR Technologies, President & CEO	Health Care/Technology
Terry Edwards	Decisive Dividend Corporation, Director & COO	Professional Services/Manufacturing
Alex Greer	Adaptive Ventures Inc., Founder and Principal	Technology/Manufacturing
Lynn Heinrich	Sun-Rype, Business Dev. & Marketing Mgr USA	Manufacturing/Communications
Sharon Hughes-Geekie	Bayshore Home Health, Area Director BC Interior	Health Care
Keith Inman	Pushor Mitchell LLP, Lawyer	Professional Services/Law
Peter Jeffrey	Okanagan Peer Mentoring Group, President	Manufacturing
Dr. Douglas Kingsford	Interior Health, CMIO & EMD	Health Care
Brad Klassen	Troika Management Group, CFO	Construction/Development
Chris Lapointe	North Sands Logistics, Principal	Aerospace
Janice Larson	Muse&Effect Consulting	Professional Services/Life Sciences
David McDougall	Blenz Coffee, Founder and Principal	Small Business & Manufacturing
Karen Olsson	Atomic47 Labs, CEO	Technology
Aura Rose	House of Rose Winery	Agriculture
Michael Zuk	RBC Dominion Securities	Professional Services/Financial Svc

### Ex-Officio Directors Representing Local Government

BC Ministry of Forests, Lands, Natural Resource Operations, & Rural Development	Regional Manager Thompson Okanagan Region	Myles Bruns
District of Lake Country	Manager of Community Systems	Jamie McEwan
City of Kelowna	Director of Business & Entrepreneurial Development	Robert Fine
Westbank First Nation	Manager of Economic Development	Mandi Carroll



City of West Kelowna	Economic Development Officer	John Perrott
District of Peachland	Planning/Economic Development Technician	Matt Faucher

#### **Local Government Appointees**

---

District of Lake Country	Councillor Cara Reed (Alternate Bill Scarrow)
City of Kelowna	Councillor Ryan Donn (Alternate Mohini Singh)
Westbank First Nation	Councillor Fernanda Alexander (Alternate Tom Konek)
City of West Kelowna	Councillor Jayson Zilkie
District of Peachland	Councillor Mike Kent
Regional District of Central Okanagan	Central Okanagan East Director Mark Bartyik

#### **Ex-Officio Directors Representing Partner Organizations**

---

Accelerate Okanagan	Brea Lake, Acting CEO
Business Development Bank of Canada	Steve North, Business Centre Manager
Community Futures of the Central Okanagan	Larry Widmer, Manager
Greater Westside Board of Trade	Calvin Barr, Vice President
Kelowna Chamber of Commerce	Carmen Sparg, President (Alt Dan Rogers, Executive Director)
Kelowna International Airport	Sam Samaddar, Airport Director
Lake Country Chamber of Commerce	Holger Nierfeld, Vice-President
Okanagan Centre for Innovation	Kelsey Helm, Director at Wheelhouse
Okanagan College	Phil Ashman, Central Okanagan Regional Dean
Peachland Chamber of Commerce	Greg Sewell, Director (Alt -Patrick Van Minsel, Manager)
Tourism Kelowna	Jennifer Horsnell, Director of Bus Devl (Alt Thom Killingsworth)
University of British Columbia-Okanagan	Phil Barker, Vice-Principal Research Okanagan
University of British Columbia-Okanagan	Nicole Udzenija, Director – Campus Initiatives
Women’s Enterprise Centre	Laurel Douglas, CEO (Alternate, Sandra Bird)

## Strategy Rationale

The programs and initiatives within the 2019 Operational Plan are derived from and consider several guiding strategies and align with strategic priorities set by the Regional District of Central Okanagan and member municipalities and governments. Key guiding documents include the [Regional Growth Strategy](#), [Aerospace Core Competency Study](#), [Growing in the Okanagan – 2020 Labour Market Outlook](#) and its corresponding [HR Implementation Plan](#) and the [Economic Opportunities to 2020 Strategy](#) for the Central Okanagan Region.

Further to the guiding documents listed above, the COEDC will undertake a comprehensive strategic planning process in 2019 resulting in the 2020-2025 COEDC Strategic Plan, a document which will crystalize regional opportunities and guide the vision of the COEDC to 2025.

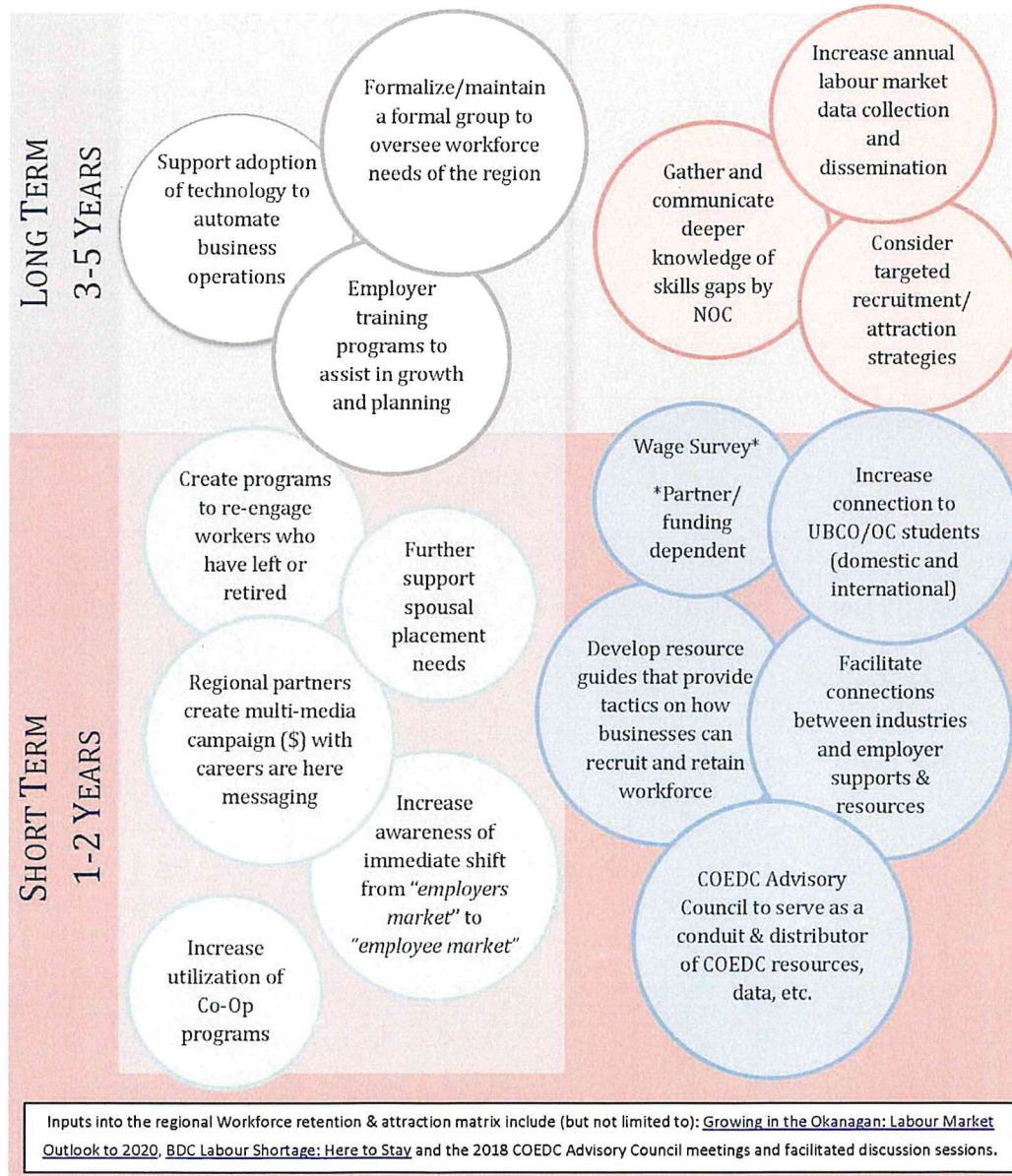




## WORKFORCE PROGRAMMING OPPORTUNITIES

### BROADER COMMUNITY & REGIONAL STAKEHOLDERS

### COEDC



## Program Delivery

The COEDC programs and services are centered under the following three programming streams: **Business Retention & Enhancement**, **Investment Attraction** and facilitating **Coordination & Connection**. Some programs meet objectives that fall under multiple programming streams.

## Business Retention and Enhancement



Photo Credit: District of Lake Country

The Central Okanagan region has long been a hotspot for entrepreneurial activity in British Columbia and Canada. With a collective attitude and culture that fosters entrepreneurship, a robust ecosystem of entrepreneurial support organizations and established infrastructure, the number of small and medium businesses thriving in the region continues to grow.

As the Central Okanagan businesses grow, the most commonly cited barrier to growth is access to skilled workers. A recent Business Development Bank of Canada [report](#) indicated that 39% of Canadian businesses are currently experiencing challenges recruiting and retaining workers. The COEDC's business outreach confirms that our region is following national trends with 41% of the region's businesses experiencing labour market challenges. Furthermore, according to BDC, the forecasted growth rate of the national labour force over the next 10 years is 0% when retirements are taken into account. As labour shortages impact the local, national and global economy, the COEDC will continue to develop and support retention and recruitment initiatives to foster the development of a strong local workforce.



Business retention and enhancement is an economic development best practice and the most resource efficient method of job creation. The COEDC follows best practice models and takes a collaborative approach to business retention and enhancement by partnering with multiple levels of government, post-secondary and business service providers to provide programming that supports the local business community, including extensive business outreach and one on one expertise and assistance.

## Business Retention and Enhancement Program

### Objectives:

- **Connect with Central Okanagan businesses to gather industry intelligence and identify barriers and opportunities for business in the region**
- **Collect and communicate workforce needs of the business community with post-secondary institutions**
- **Develop industry sectors with regional economic significance or high growth potential**

Program & Tactics	Outcomes	Measurement Guidelines
<b>Business Outreach</b>		
<p>Conduct up to 150 1:1 in-depth site visits to businesses in the region with a focus on gathering local business intelligence, connecting businesses to resources and identifying and communicating business needs.</p> <p>2019 priorities include:</p> <ul style="list-style-type: none"> <li>• Aerospace</li> <li>• Agriculture</li> <li>• Emerging industries e.g. cannabis, tech-enabled</li> <li>• Growth stage businesses</li> <li>• Manufacturing</li> </ul>	<ul style="list-style-type: none"> <li>• Direct connection with businesses in the region</li> <li>• Increased industry intelligence for key economic sectors</li> <li>• Connect industry with relevant COEDC programs. Ex: Connector, OYP Collective, Export Development</li> </ul>	<ul style="list-style-type: none"> <li>• # of site visits</li> <li>• # of connections between businesses</li> <li>• # of referrals to business service providers and multiple levels of government support</li> <li>• # of businesses receiving follow-up one-on-one</li> </ul>

Collect business intelligence on the above key industry sectors that can be used for future programming for the Commission.

Act as a conduit to connect businesses with information and support at the Provincial and Federal level i.e. BC Trade & Investment Reps, Trade Commissioners Service, trade agreement information.

Identify businesses that require on-on-one assistance and connect them to support agencies and programs.

Identify training and workforce needs to communicate to post-secondary institutions, while disseminating labour market information and awareness through one-on-one contact with employers.

- Improved connections between employers and training institutions and alignment of skills training with employer needs
- Improved connectivity within industries, both B2B and between businesses and industry associations

## Objectives:

- **Collect, communicate and promote the Central Okanagan business climate**
- **Collect and communicate workforce needs of the business community with post-secondary institutions**
- **Connect businesses to support agencies and government programs**
- **Identify businesses requiring one-on-one assistance**
- **Connect businesses with one another to promote cross-collaboration**

Program & Tactics	Outcomes	Measurement Guidelines
<b>Small Business Walk</b>		
Use Business Walk data to improve business retention and enhancement programming within the region	<ul style="list-style-type: none"> <li>• Increased regional data – understanding of gaps and opportunities</li> </ul>	<ul style="list-style-type: none"> <li>• # of partnerships</li> <li>• # of business visited</li> </ul>
Help businesses maximize use of programs/services available to them that support growth	<ul style="list-style-type: none"> <li>• Increased availability of data regarding workforce needs/challenges - understanding of</li> </ul>	<ul style="list-style-type: none"> <li>• # of businesses receiving follow up one-on-one assistance</li> </ul>
Connect businesses within region that could		



potentially collaborate with one another	workforce gaps and training opportunities	<ul style="list-style-type: none"> <li>• # of cross referrals between businesses with agencies providing support services to small businesses</li> </ul>
Coordinate response to businesses surveyed requiring follow up	<ul style="list-style-type: none"> <li>• Improved regional cohesion</li> </ul>	
A component of this program to include focus on Human Resources and Workforce Development, including enhanced relationships between industry and post-secondary institutions	<ul style="list-style-type: none"> <li>• Increased connectivity of businesses within the region</li> <li>• Stronger engagement with business leaders</li> <li>• Increase in # of businesses receiving assistance</li> </ul>	<ul style="list-style-type: none"> <li>• Creation of initiatives/projects</li> <li>• Web and social media counts</li> <li>• Volume of media coverage</li> </ul>

### Objectives:

- Increase awareness and profile of the agriculture and agri-foods sector in the region and enhance connections among businesses
- Disseminate agriculture sector intelligence
- Provide one-on-one assistance to farmers and agriculture-related businesses

Program & Tactics	Outcomes	Measurement Guidelines
<b>Agriculture &amp; Agri-Tourism Program</b>		
Conduct 12-15 one-on-one site visits to Central Okanagan farms, inviting municipal representatives and/or appropriate stakeholder representatives (i.e. Tourism Kelowna, Ministry of Agriculture) to attend and work with operators on any follow up	<ul style="list-style-type: none"> <li>• Provide relevant information to the agriculture sector</li> <li>• Improved connection between agriculture businesses and service providers in region</li> </ul>	<ul style="list-style-type: none"> <li>• # of participants</li> <li>• Feedback from participants</li> <li>• Data collected from site visits</li> </ul>
Schedule and conduct 1-2 agriculture/business development events. One of the events will have a regional focus aimed at aligning RDCO EDC agricultural activities with provincial and municipal government goals and objectives for agriculture.	<ul style="list-style-type: none"> <li>• Increased industry intelligence for the agriculture sector</li> </ul>	<ul style="list-style-type: none"> <li>• # of referrals to service providers</li> <li>• # of one-on-one</li> </ul>

Create 8-10 written profiles on Central Okanagan farm operators &/or food processors to raise profile of agriculture in the region	<ul style="list-style-type: none"> <li>• Communication of industry intelligence / needs</li> </ul>	follow up requests
Ensure COEDC presence at 2-4 industry events	<ul style="list-style-type: none"> <li>• Increased awareness of agriculture as a viable business in the region</li> </ul>	

### Program & Tactics

### Outcomes

### Measurement Guidelines

**Agriculture Asset Inventory**  
*See page 22*

Program & Tactics	Outcomes	Measurement Guidelines
<b>Craft Beverage Sector Support</b>		
Implement select tactics identified in the 2018 Craft Beverage Study, including: working with partners to create Craft Beverage Startup How-to Guide/Checklist to assist new market entrants in navigating regulatory and business environment and providing industry intelligence and data to partners, including Okanagan College's Technology Access Centre for Fermented Beverages application.	<ul style="list-style-type: none"> <li>• Increased resources available to new and existing craft beverage producers</li> <li>• Increased connectivity to industry</li> </ul>	<ul style="list-style-type: none"> <li>• Guides produced</li> <li>• # of new businesses accessing resources</li> <li>• # of partners engaged</li> </ul>



## Objectives:

- Increase understanding of labour market conditions in the region including labour demand, skills under pressure and compensation practices
- Identify and publish HR & workforce development challenges in the region
- Identify skill training gaps and communicate with post-secondary and training institutions
- Develop HR and recruitment tools for employers

Program & Tactics	Outcomes	Measurement Guidelines
<b>Real-time Labour Market Intelligence</b>  Obtain and disseminate quarterly aggregated local hiring demand data.  Identify in demand occupation classes, industries, educational requirements and skills and “snapshot” of active labour market.  Increase understanding of the region’s labour market by leveraging data analytics.	<ul style="list-style-type: none"> <li>• Increase in information available to address employer recruitment challenges and local unemployment numbers</li> <li>• Increased understanding of the labour market in the region among partners/stakeholders</li> </ul>	<ul style="list-style-type: none"> <li>• # of quarterly reports issued</li> <li>• # of partners utilizing data to improve programming (post-secondary, government, industry associations etc.)</li> </ul>
Program & Tactics	Outcomes	Measurement Guidelines
<b>Central Okanagan Wage Survey</b>  Explore potential partnerships and funding mechanisms to conduct Central Okanagan Wage Survey.  Project to include comprehensive survey of Central Okanagan businesses to increase understanding of local compensation practices across a variety of industries and business sizes.	<ul style="list-style-type: none"> <li>• Increased regional understanding of compensation practices across industries</li> </ul>	<ul style="list-style-type: none"> <li>• # of partners</li> <li>• # of businesses surveyed</li> </ul>
★ Partner and Funding Dependent		

## Objectives:

- Increase awareness of career and lifestyle opportunities through content creation/storytelling.
- Increase connection between UBC Okanagan and Okanagan College students and external community.
- Increase retention of young professionals, recent graduates and newcomers through facilitated professional network building

Program & Tactics	Outcomes	Measurement Guidelines
<p><b>Okanagan Young Professionals Collective (OYP)</b></p> <p>The OYP supports the attraction and retention of a skilled workforce in the region through fostering a culture for young professionals, workforce development initiatives and engagement with post-secondary. The OYP works to achieve its mandate in three streams with distinct deliverables: Community Cultivation, Student Liaison and the Connector Program.</p>	<ul style="list-style-type: none"> <li>• Increased awareness of professional opportunities for young professionals in the region</li> <li>• Increased capacity of young professional groups in the region</li> </ul>	<ul style="list-style-type: none"> <li>• # of jobs attained by post-secondary graduates as a result of OYP tactics</li> <li>• # of successful retention and relocation stories</li> </ul>
<p><b>Community Cultivation</b></p> <p>Creation and execution of storytelling strategy aligned by “verticals” including industry sectors (manufacturing/aerospace, agriculture/viticulture, film/animation/digital media, health care, ICT), diversity, arts &amp; culture, social impact sector, mental health, lifestyle &amp; social integration.</p>	<ul style="list-style-type: none"> <li>• Increased retention of students of post-secondary institutions</li> <li>• Development of strategic partnerships with industry associations, regional stakeholders and community groups</li> </ul>	<ul style="list-style-type: none"> <li>• # of partnerships and collaborations</li> <li>• # of Facebook likes, twitter followers, COEDC/OYP newsletter subscribers</li> </ul>
<p>Strategy to include:</p> <ul style="list-style-type: none"> <li>• 15-20 pieces of original content (blogs, interviews, videos) showcasing career paths/opportunities in the region profiling real Central Okanagan residents and businesses according to storytelling strategy</li> <li>• monthly newsletter featuring relevant information and events for young professionals</li> <li>• social media strategy with regular posting</li> </ul>	<ul style="list-style-type: none"> <li>• Business growth through retention and attraction of skilled workforce</li> <li>• Improve retention and integration of young</li> </ul>	<ul style="list-style-type: none"> <li>• # of connections</li> <li>• % of population growth</li> <li>• # of new residents, graduates and young professionals connected (connectees)</li> </ul>



- schedule
- review of OYP Collective pages on investkelowna.com site

Foster connections through community engagement including acting as a conduit for new and existing young professionals and develop and maintain relationships with young professional groups and community organizations in the region

professionals, recent graduates and newcomers to the region by facilitating accelerated access to networks

- # of connectors
- # of connectees that find employment as a result of the program

### **Student Liaison**

Activities to include:

- Establish and/or maintain OYP Collective presence at on-campus events i.e. Homecoming, Orientation, Graduation events etc.
- Organize and host external events to bring students off campus
- Act as a conduit and provide information and resources to students looking to connect to external community
- Develop/maintain relationships with alumni associations, career services, co-op, ENACTUS and other on-campus groups/departments, and host 1-2 roundtables per year.

### **Connector Program**

Match young professionals, recent graduates and newcomers and spouses/partners of new residents (connectees) with well-networked local employers, civil servants and community leaders (connectors) based on industry experience, professional backgrounds and sector of interest.

Hold 2-3 roundtables and/or networking opportunities aimed at maintaining engagement of Connectors, Connectees and partners.

Program & Tactics	Outcomes	Measurement Guidelines
<b>Innovation Generation Challenge</b>		
Partner with Central Okanagan Public Schools on iGen Challenge, a program which promotes an entrepreneurial and innovative mindset by creating opportunities for middle and secondary school students to build viable businesses.	<ul style="list-style-type: none"> <li>Increased awareness of entrepreneurship as a career option and promotion of entrepreneurial mindset</li> <li>Development of relationships between COEDC, Central Okanagan Public Schools, local employers and students</li> </ul>	<ul style="list-style-type: none"> <li>Amount of sponsorship \$</li> <li># of partners participating as sponsors and/or judges</li> <li># of student teams participating</li> <li>Ongoing businesses created</li> </ul>

**Objective:**

- Provide expertise and guidance to export ready businesses
- Create business guidance informational sessions as one resource to increase export readiness

Program & Tactics	Outcomes	Measurement Guidelines
<b>Export and Business Development</b>		
Provide export related expertise & one-on-one support to up to 20 export related businesses.	<ul style="list-style-type: none"> <li>Support businesses in developing or strengthening global markets &amp; trade</li> </ul>	<ul style="list-style-type: none"> <li># of businesses engaged</li> </ul>
Facilitate international trade opportunities with government & partners.	<ul style="list-style-type: none"> <li>Increased capital for growth sectors</li> </ul>	<ul style="list-style-type: none"> <li># inquiries</li> <li># B2B matches</li> </ul>
Partner with Global Affairs Canada and Trade and Invest BC to promote new funding sources, trade agreements and export opportunities.	<ul style="list-style-type: none"> <li>Increase in exports and</li> </ul>	<ul style="list-style-type: none"> <li># B2C matches</li> </ul>

Facilitate 1-2 business enhancement sessions targeting business development topics as well as sector-specific sessions in partnership with community stakeholders.

Ex: Succession Planning, Industry 4.0, Financing Resources, China Business Roundtable, etc.

growth in exporting companies

- Support growth by providing start-up and business guidance
  - Increased understanding of business or sector gaps and opportunities
  - Ability to address barriers more quickly and facilitate tools for growth and expansion
  - Strengthened role as a credible source of information on the local economy
- # trade initiatives, programs and delegations
  - # of existing exporters ready to enter new markets
  - # of session attendees



## Investment Attraction



*Image courtesy of KF Aerospace*

Over the past several years, the Central Okanagan region has benefited from increased awareness of the Okanagan region and strong Canadian brand presence internationally. The COEDC continues to promote awareness of the region to domestic and international audiences while leveraging relationships with Provincial and Federal agencies including BC Trade & Investment and Global Affairs Canada Trade Commissioner Service to increase connectivity to international markets.

The development of the University of British Columbia's [Innovation Precinct and Learning Factories](#) presents a significant opportunity for innovation-driven companies to access the extensive R&D capabilities of the university to accelerate growth. The Innovation Precinct combined with other recent and planned developments and partnerships including but not limited to the Okanagan Centre for Innovation, regional participation on the Digital Technology Supercluster and the Cascadia Corridor partnership are elevating the attractiveness and competitiveness of the region as a destination for top companies and skilled workforce.

A major factor in a company's location decision is access to skilled workforce. Retention and recruitment of human capital is not only regarded as a best practice tool in economic development but also a key element for any community to compete in the global marketplace. By implementing targeted strategies that centre on workforce development, communities not only enhance competitiveness in attracting talent but also companies.

## Investment Attraction Program

### Objectives:

- Identify opportunities for attraction of foreign direct investment and skilled workforce from domestic and international markets
- Build and strengthen strategic partnerships to increase awareness and profile of the Central Okanagan

Program & Tactics	Outcomes	Measurement Guidelines
-------------------	----------	------------------------

### 2020-2025 Strategic Plan

Develop Economic Base Analysis of Central Okanagan region including regional competitiveness and trend analysis, and value proposition

Identify opportunities based on base analysis and in alignment with existing guiding documents including the Regional Growth Strategy, local government strategic plans and provincial and federal long term strategies.

Create high level Road Map and detailed Action Plan defining short, medium and longer term objectives with associated performance metrics in alignment with existing operational resources

- Increased ability to capitalize on provincial, federal and global opportunities and trends

- Defined action plan and performance metrics to guide long-term activities

- Improved clarity of regional value proposition and opportunities

- Completion of strategic plan

- # of partners engaged

- # of tactics identified

Program & Tactics	Outcomes	Measurement Guidelines
-------------------	----------	------------------------

### Cascadia Corridor Partner

Explore opportunities to leverage enhanced partnerships in the Cascadia Corridor (BC, Washington, Oregon).

Facilitate connections and deepen

- Increased awareness of the Central Okanagan provincially and in the Pacific Northwest

- # of partners
- # of meetings facilitated

relationships with local, provincial and US partners in the Pacific Northwest including UBC Okanagan, Accelerate Okanagan, BC Trade and Investment and local economic development agencies in Washington and Oregon.

Specific opportunity areas include viticulture and wine, aerospace and the UBCO digital learning factory.

- Increased opportunity for local companies to access US markets and investment
- Attraction of FDI and human capital from the Pacific Northwest

Program & Tactics	Outcomes	Measurement Guidelines
<p><b>Agriculture Asset Inventory</b></p> <p>Develop an Agriculture Asset Inventory to establish baseline knowledge of the agricultural and food-processing ecosystem in the region and identify opportunities for investment attraction.</p> <p>Report to include detailed information such as: research infrastructure, funding supports, key individuals (research and expertise) and accelerators/incubators at the regional level.</p> <p>This project will increase knowledge of the agriculture and food processing ecosystem to communicate the region's value proposition to FDI targets. The project objective is the creation and broad distribution of an asset inventory and report of the Agriculture and Agri-food Sector of the Okanagan Valley</p>	<ul style="list-style-type: none"> <li>• Enhanced knowledge of the existing agricultural and food-processing sector</li> <li>• Identification of value proposition for investment attraction in the sector</li> <li>• Retention and expansion of sector in the region</li> </ul>	<ul style="list-style-type: none"> <li>• Final report issued</li> <li>• # partners engaged</li> <li>• # of downloads</li> </ul>



Program & Tactics	Outcomes	Measurement Guidelines
<b>In-Market Activities</b> Explore partnerships (industry, post-secondary, multiple levels of government) and best use of resources to engage in in-market activities in target markets for attraction of investment and human capital. Key target markets include Toronto and European markets.  ★ <i>Partnership and Funding Dependent</i>	<ul style="list-style-type: none"> <li>Enhanced relationships and alignment of resources with industry and stakeholders</li> <li>Increased awareness of Central Okanagan</li> <li>Attraction of investment and human capital to region</li> </ul>	<ul style="list-style-type: none"> <li># of partners engaged</li> <li># of strategic opportunities identified</li> <li># of attraction leads identified</li> </ul>

#### Objectives:

- Contribute to the growth of the tech-enabled businesses in the Central Okanagan
- Promote the region as a destination for entrepreneurs, skilled workforce, students and families

Program & Tactics	Outcomes	Measurement Guidelines
<b>Accelerate Okanagan Partner</b> Align with Accelerate Okanagan strategies to drive growth in tech-enabled companies and start-ups <i>across sectors</i> .  Partner with Accelerate Okanagan in promotion and marketing efforts to position the Central Okanagan as a prime destination for domestic and international entrepreneurs and skilled workforce.  Leverage and promote Accelerate Okanagan events and initiatives and facilitate Okanagan presence at local and outbound conferences and events.	<ul style="list-style-type: none"> <li>Improved climate for start-ups in the region</li> <li>Growth of local tech-enabled companies</li> <li>Attraction of tech-enabled companies and divisions to the region</li> <li>Increased impact and leveraging of economies of scale through alignment of priorities</li> </ul>	<ul style="list-style-type: none"> <li># of leads/referrals generated</li> <li># of entrepreneurs locating to the region</li> <li># of job postings filled</li> <li># of events</li> </ul>

Program & Tactics	Outcomes	Measurement Guidelines
<b>OKGN Angel Summit</b>		
Provide support for Accelerate Okanagan's pilot OKGN Angel Summit, an investor-led training program designed to raise awareness of angel investing and increase access to capital for local early-stage startups.	<ul style="list-style-type: none"> <li>• Increase amount of capital being deployed locally by investors</li> <li>• Increased access to capital for local startups</li> </ul>	<ul style="list-style-type: none"> <li>• # of investors participating</li> <li>• # of startups participating</li> <li>• Capital deployed</li> </ul>

Program & Tactics	Outcomes	Measurement Guidelines
<b>Expat Recruitment in International Markets</b>		
Target Canadians in international markets that can bring expertise and investment resources to the region.	<ul style="list-style-type: none"> <li>• Attraction of entrepreneurs, investors and talent to the region</li> </ul>	<ul style="list-style-type: none"> <li>• # of inquiries as result of activity</li> <li>• # of entrepreneurs relocating to the region</li> </ul>
Tactics and activities to include digital marketing and creation/maintenance of assets and resources	<ul style="list-style-type: none"> <li>• Increased investment capital to support local start-ups and companies</li> <li>• Increased number of business leaders in the region</li> </ul>	<ul style="list-style-type: none"> <li>• # of capital invested by Expats in the region</li> </ul>

Program & Tactics	Outcomes	Measurement Guidelines
<b>Partnership with Okanagan Film Commission</b>		
Partner with Okanagan Film Commission to facilitate an Okanagan presence at industry events, generate B2B connections and recruit skilled workforce.	<ul style="list-style-type: none"> <li>• Attraction of skilled workforce, companies and investors to the region</li> </ul>	<ul style="list-style-type: none"> <li>• # of events hosted/attended</li> <li>• # of skilled</li> </ul>

Work with targeted gaming and animation businesses currently located in Vancouver and Toronto to pitch the Okanagan for relocation/expansion	<ul style="list-style-type: none"> <li>Increased film and animation activity and investment in the region</li> </ul>	<ul style="list-style-type: none"> <li>workforce relocation leads</li> <li># of investment attraction leads</li> </ul>
Provide in-kind support to initiatives to develop studio space and other film industry assets in the Okanagan.	<ul style="list-style-type: none"> <li>Increase profile and awareness of region nationally and intentionally</li> </ul>	<ul style="list-style-type: none"> <li># of film production activity in the region</li> </ul>

### Objectives:

- Promote business/career opportunities in the Central Okanagan
- Increase the profile of the Central Okanagan as a place for skilled workers, businesses and families seeking to relocate from within Canada and abroad

Program & Tactics	Outcomes	Measurement Guidelines
<b>InvestKelowna.com Refresh</b>  Update the region's primary FDI tool, InvestKelowna.com, to improve functionality and ease access to resources.	<ul style="list-style-type: none"> <li>Improved access to COEDC and partner resources and information</li> <li>Enhanced marketing of the region</li> </ul>	<ul style="list-style-type: none"> <li>Website traffic</li> <li># of resource views/downloads</li> </ul>

Program & Tactics	Outcomes	Measurement Guidelines
<b>Regional Promotion Assets</b>  Continue to develop, maintain and distribute COEDC resources with enhanced content and relevant information for the attraction and retention of skilled workforce and companies to the Central Okanagan region.	<ul style="list-style-type: none"> <li>Increased awareness of Central Okanagan in targeted markets</li> <li>Increased knowledge</li> </ul>	<ul style="list-style-type: none"> <li>Website traffic</li> <li># of inquiries</li> <li># of investment</li> </ul>



Assets include but are not limited to:	of region's assets and competitive advantages	prospects
<b>Regional Information and Promotion</b> <ul style="list-style-type: none"> <li>• Central Okanagan Economic Profile</li> <li>• Industry Profiles</li> <li>• How Does the Okanagan Compare infographic</li> <li>• Quarterly Economic Indicators</li> <li>• Agriculture Profile</li> <li>• Business Resources &amp; Financing Guides</li> <li>• Social Media</li> <li>• InvestKelowna.com</li> <li>• Make It Here assets</li> <li>• Agriculture Asset Inventory</li> </ul>	<ul style="list-style-type: none"> <li>• Enhanced information available for site selectors, skilled workforce and other target markets</li> </ul>	<ul style="list-style-type: none"> <li>• # of site selection inquiries</li> <li>• # of downloads COEDC reports/resources</li> <li>• # of blog posts and web content</li> </ul>

Program & Tactics	Outcomes	Measurement Guidelines
<b>Tourism Kelowna Business Events Strategy</b>  Provide in-kind support to and partner with Tourism Kelowna initiatives to promote the Central Okanagan as a destination for business events and other major events increasing the profile of the region.  Provide expertise in the development of an industry sector strategy to attract events	<ul style="list-style-type: none"> <li>• Enhanced recognition of the Central Okanagan domestically and internationally</li> </ul>	<ul style="list-style-type: none"> <li>• # of sector strategies published</li> <li>• # of events/meetings hosted in the region</li> </ul>

Program & Tactics	Outcomes	Measurement Guidelines
<b>Okanagan Innovation Summit/Workshop</b>  Host Okanagan Innovation Summit in partnership with UBC Okanagan and Accelerate Okanagan. Summit to highlight developments in advanced manufacturing, identify opportunities to connect local industry and	<ul style="list-style-type: none"> <li>• Increased awareness of innovation in the Central Okanagan to provincial, national and international</li> </ul>	<ul style="list-style-type: none"> <li>• # of participants from local industry</li> <li>• # of delegates from outside the</li> </ul>

stakeholders to multi-national partners, and introduce technology solutions to partners.

partners

Okanagan

- Increased connectivity to local industry and investment from multi-national corporations
- # of connections made

### Objective:

- **Work collectively to increase knowledge of the Central Okanagan as a place for investment in the global marketplace**

Program & Tactics	Outcomes	Measurement Guidelines
<b>Okanagan Valley Economic Development Society (OVEDS)</b>		
Actively participate in the OVEDS to identify projects to collectively market the Central Okanagan as a place for investment.	<ul style="list-style-type: none"> <li>• Increased Okanagan presence in targeted markets</li> </ul>	<ul style="list-style-type: none"> <li>• # of projects</li> <li>• # of web counts</li> </ul>
Including tactics and activities supporting: <ul style="list-style-type: none"> <li>• Trade show partnership e.g. ICSC</li> <li>• Human Capital recruitment initiatives</li> </ul>	<ul style="list-style-type: none"> <li>• Increased knowledge of region's assets and competitive advantages</li> </ul>	<ul style="list-style-type: none"> <li>• # of investment prospects</li> </ul>

## Coordination & Connection



*Photo Credit: Accelerate Okanagan*

The COEDC is often the first point of contact for domestic and international businesses, governments, investors and individuals seeking information about the Central Okanagan. Acting as a **catalyst**, a **conduit** and **connector**, the COEDC brings businesses, organizations, government and the community together for projects and initiatives that benefit the region's vitality and economic well-being.

In addition to aligning with the Regional Growth Strategy, local government economic development strategic plans and COEDC strategies and reports, the COEDC leverages its Advisory Council and engages directly with community and business leaders to gain a better understanding of the region's challenges and opportunities, and develop programs and services that facilitate sustainable economic growth.



## Coordination & Connection

### Objectives:

- Facilitate increased cohesion among economic development organizations, business service providers and the private sector in the region
- Support and enhance capacity of municipal economic development functions and partner organizations
- Positively impact the ability for businesses to grow and sectors to connect in the Central Okanagan

Program & Tactics	Outcomes	Measurement Guidelines
<b>Regional Growth Strategy - enhance awareness and support priority project plan(s)</b>		
Align COEDC with RGS Priority Projects Plan by providing input and expertise as appropriate.	• Identification of cross-collaboration opportunities	• # projects in alignment
RDCO RGS 2019 priority projects include Regional Flood Management Plan, Regional Planning Lab and Regional Housing Strategy.	• Increased information sharing between communities	• # of cross-collaboration opportunities identified
Ensure COEDC projects feed into future regional priority projects as appropriate, for example, alignment between the 2019 Agriculture Asset Inventory (pg 22) and Regional Agricultural Strategy, a 2020 RGS priority project.		
Program & Tactics	Outcomes	Measurement Guidelines

### Account Management System – Economic Development Organizations (EDO)

Maintain database of local businesses and information gathered through business	• Cohesive economic development delivery	• # of businesses entered in account
---	--	--------------------------------------

outreach. Publish business intelligence ascertained from aggregated business outreach surveys.

Continue to host and provide member local government staff (EDO's) with support and licensed use of regional account management system to record and maintain a database of site visitations and business walk information.

- Support increased capacity to each local government's Economic Development function or service
- Recognition of areas of opportunity and how to effectively address at local level
- Enhanced understanding of business community in region
- Database containing detailed info for businesses in Central Okanagan

management database

- Consistent use of account management software by EDO

Program & Tactics	Outcomes	Measurement Guidelines
<b>Identify and support local government economic development priorities</b>		
Facilitate quarterly meetings with member local government Economic Development Officers with the purpose of aligning priorities, avoiding duplication of services and leveraging resources.	<ul style="list-style-type: none"> <li>• Identification of cross-collaboration opportunities</li> <li>• Increased information sharing between communities</li> <li>• Identification of economic development program and service gaps</li> </ul>	<ul style="list-style-type: none"> <li>• # of EDO's attending meeting</li> <li>• # of cross-collaboration opportunities identified</li> </ul>

Program & Tactics	Outcomes	Measurement Guidelines
<b>Recognize and celebrate the Okanagan Syilx culture</b>		
Partner with Westbank First Nation on initiatives and communications recognizing the culture, contribution and community of the Syilx people, who have inhabited the region for thousands of years.	<ul style="list-style-type: none"> <li>Increased awareness of Syilx culture and history in the region and externally</li> </ul>	<ul style="list-style-type: none"> <li># of meetings held</li> <li># of initiatives identified</li> </ul>
Activities to include providing support to the 2019 Indigenous Tourism Conference and working directly with WFN economic development manager and commission to identify appropriate partnership opportunities.	<ul style="list-style-type: none"> <li>Continued strengthening of relationships between RDCO/COEDC and WFN</li> </ul>	<ul style="list-style-type: none"> <li>Content shared</li> </ul>
Program & Tactics	Outcomes	Measurement Guidelines
<b>Business Service Provider Roundtables</b>		
Facilitate 1-2 roundtable sessions for business service providers to share information, trends, opportunities and programs and services available to local businesses.	<ul style="list-style-type: none"> <li>Increased knowledge of business service providers' programs available to the community</li> <li>Increased cross-referrals and collaboration between service providers</li> </ul>	<ul style="list-style-type: none"> <li># of roundtables</li> <li># of business service providers participating at roundtable</li> <li># of referrals</li> </ul>



Program & Tactics	Outcomes	Measurement Guidelines
<b>Air Service Development</b>		
<p>Work in partnership with Kelowna International Airport (YLW), Tourism Kelowna, Thompson Okanagan Tourism Association (TOTA) and other community stakeholders and participate as an active member of YLW's route development task force.</p> <p><i>*Note that several of COEDC's projects in domestic and international markets are in part developed to support existing and incoming air route development. i.e. Toronto, Calgary, US markets</i></p>	<ul style="list-style-type: none"> <li>Increased and/or more effective infrastructure/air service</li> </ul>	<ul style="list-style-type: none"> <li># of increased air access/routes</li> <li># of assets developed</li> <li># of pitch packages</li> </ul>
Program & Tactics	Outcomes	Measurement Guidelines
<b>Municipal Economic Development Committee Advisor</b>		
<p>Hold ex-officio position on economic development committees at member municipalities/governments.</p> <p>Provide regional perspective and keep committees informed of economic initiatives at regional level to increase awareness, leverage resources and facilitate alignment.</p>	<ul style="list-style-type: none"> <li>Increased sharing of economic development knowledge and expertise</li> <li>Identification of opportunities for collaboration between communities</li> <li>Identification of gaps or overlap in economic development initiatives</li> </ul>	<ul style="list-style-type: none"> <li># of committees</li> <li># of opportunities identified</li> </ul>

Program & Tactics	Outcomes	Measurement Guidelines
<b>Regional Coalition of Marketing Assets</b>		
Bring together various groups involved in promoting/marketing the Okanagan region to increase alignment in messaging and leverage platforms.	<ul style="list-style-type: none"> <li>• Increase effectiveness of individual marketing campaigns</li> <li>• Share/leverage financial and human capital resources to enhance marketing campaigns</li> <li>• Increase awareness of Okanagan region in target markets</li> </ul>	<ul style="list-style-type: none"> <li>• # of assets/campaign created</li> <li>• # of audiences reached</li> <li>• # of inquiries</li> <li>• # of partners engaged</li> </ul>
Partners include but are not limited to: Accelerate Okanagan, Tourism Kelowna, Chambers of Commerce, local government economic development functions, UBC Okanagan, Okanagan College		

### Objectives:

- Inform partner organizations and the business community of range of COEDC programs and services
- Develop awareness of economic climate in the region through various data delivery mechanisms

Program & Tactics	Outcomes	Measurement Guidelines
<b>Publications &amp; Resources</b>		
Develop, maintain and distribute targeted publications and resources including but not limited to the following:	<ul style="list-style-type: none"> <li>• Increased knowledge of regional economy, growth sectors and needs of the business community</li> <li>• Identification of the region's business attributes and assets</li> </ul>	<ul style="list-style-type: none"> <li>• # of unique visitors</li> <li>• # of inquiries</li> <li>• Web and social media counts</li> <li>• Volume of media coverage</li> </ul>
<b>Regional Information and Promotion</b>		
<ul style="list-style-type: none"> <li>• About Us info sheet</li> <li>• Business Resources &amp; Financing Guides</li> <li>• Social Media</li> <li>• InvestKelowna.com 2019 refresh</li> <li>• Agriculture Asset Inventory</li> </ul>		



<p><b>Economic Climate</b></p> <ul style="list-style-type: none"> <li>• Quarterly Economic Indicator report</li> <li>• Collated economic climate slides</li> <li>• Dissemination of current economic climate data</li> </ul> <p><b>Workforce Development</b></p> <ul style="list-style-type: none"> <li>• Make It Here branding and assets</li> <li>• Labour market information</li> <li>• Central Okanagan Wage Survey</li> </ul>	<ul style="list-style-type: none"> <li>• Outflow of communication and information resources for people &amp; businesses</li> <li>• Enhanced ability to respond to inquiries from domestic and international markets</li> </ul>	<ul style="list-style-type: none"> <li>• % of newsletter distribution growth</li> <li>• # of downloads</li> </ul>
--	--	---

Program & Tactics	Outcomes	Measurement Guidelines
-------------------	----------	------------------------

#### Storytelling Strategy

Develop and execute storytelling strategy to create, support and distribute content with objective of supporting business recruitment efforts, raising profile of region for investment, assist local stakeholders increase knowledge and awareness of local success stories.

Identify storytelling themes/verticals e.g. careers, industry sectors

Utilize Advisory Council expertise in industry sectors and position council members as local sector thought leaders.

- Increase profile of region's business and career opportunities

- Strategy developed
- # of content pieces created
- # of content pieces shared
- Website/blog traffic
- Requests for use

Program & Tactics	Outcomes	Measurement Guidelines
-------------------	----------	------------------------

#### Economic Climate Awareness Sessions & Community Engagement Sessions

Deliver presentations on the economic climate of the region to businesses and organizations interested in learning more about the current

- Increased knowledge of economic climate and trends of the region

- # of presentations
- # of inquiries



state of the Central Okanagan's economy.

Deliver presentations on mandate of the COEDC and updated programs and services for 2019 to staff and councils of member municipalities/governments (Lake Country, Kelowna, West Kelowna, Peachland, Westbank First Nation), business service organizations and key stakeholders.

Create digital and print communication tools to increase awareness of COEDC initiatives and share economic climate information.

Facilitate opportunities for municipal and economic development staff to co-present with COEDC.

**2019 goal:** a minimum of 25 predetermined presentations to targeted stakeholder groups and up to 25 additional presentations as requested by the community.

- Identification of the region's key economic drivers and competitive advantages

- Increase in stakeholders' ability to service clients

- Increase awareness of COEDC programs

- Facilitate the COEDC as the first point of contact for inquiries

- Engaged partners

resulting from presentations

- Web and social media counts

- % of newsletter distribution growth

Program & Tactics	Outcomes	Measurement Guidelines
<b>Team-to-Team and Exec-to-Exec Roundtables</b>		
Facilitate team-to-team and/or exec-to-exec roundtable meetings between COEDC staff and/or advisory council executive and key partner organizations based on strategic priorities.	<ul style="list-style-type: none"> <li>• Increased awareness of COEDC and partner programs and priorities at a staff and executive level</li> </ul>	<ul style="list-style-type: none"> <li>• # of partner roundtables</li> <li>• # of opportunities identified</li> </ul>
Including but not limited to: <ul style="list-style-type: none"> <li>• Westbank First Nation Economic Development Committee</li> <li>• Thompson Okanagan Tourism Association</li> <li>• Tourism Kelowna</li> <li>• YLW Senior Leadership/ Air Service Committee</li> </ul>	<ul style="list-style-type: none"> <li>• Increased opportunity for strategic partnerships and synergies between organizations</li> <li>• Recognition of regional trends and opportunities</li> </ul>	<ul style="list-style-type: none"> <li>• # of referrals generated</li> </ul>

- Okanagan College Regional Advisory Committee
- UBC Okanagan Senior Leadership team
- Business Development Bank of Canada
- Chambers of Commerce and Business Improvement Areas
- Industry Associations i.e. CHBA, SICA, Young Agrarians, CME
- Reduction of service duplication

The COEDC thanks our active partners for continued support and collaboration in fostering a healthy and dynamic sustainable economy in the Central Okanagan.

Westbank First Nation  
Kelowna Chamber of Commerce  
City of Kelowna  
Okanagan Centre for Innovation  
Women's Enterprise Centre  
Tourism Kelowna BCEDA UBC Okanagan  
Community Futures KCR OVEDS UDI  
Global Affairs Canada YLW  
District of Lake Country  
City of West Kelowna  
BDC TOTA OMREB  
District of Peachland  
Province of BC GWBOT  
Accelerate Okanagan  
Peachland Chamber of Commerce  
Okanagan College Government of Canada  
Lake Country Chamber of Commerce