



2010 CF STAFF PROFESSIONAL DEVELOPMENT

REGISTER NOW! Develop and enhance your skills and knowledge for the new economy! Network and share ideas with Community Futures across the province!

Coast Capri Hotel – 1171 Harvey Avenue, Kelowna BC (250) 860-6060

Tuesday April 20th	10:00am to 1:00pm 1:00pm to 4:30pm 3:00pm to 5:00pm 7:00pm to 9:00pm	EDP Roundtable Self Employment Roundtable & Business Analyst Roundtable Meet & Greet
Wednesday April 21st	7:30am to 8:30am 8:30am to 4:30pm 8:30am to 4:30pm 5:45pm to 8:30pm	Breakfast & Registration Full day training (3 options) General Manager Roundtable Banquet
Thursday April 22nd	7:30am to 8:30am 8:30am to 4:30pm	Breakfast Full day training (3 options)

Contact: Alexis Welsh, CF Okanagan-Similkameen
(250) 493-2566 x 212 alexis@cfokanagan.com

- Registration fee is \$495 pp+5% GST.
General Manager's fee is \$275 pp+5% GST.
Fee includes all conference materials and meals as noted on registration form.
- Hotel Rooms: participants will book and pay for their own rooms. Reserved room blocks are held at the Coast Capri and at the Hotel Eldorado – see hotel details on the registration form.
- Meals: registration includes 2 breakfasts, 2 lunches, 1 dinner and all breaks. Participants meet in the lobby of the Coast Capri on Wednesday April 21st at 5:45pm and will be taken by bus for the annual banquet! This year we go to the Hotel Eldorado lakefront! We also have a special guest speaker!
- The EDP Roundtable provides lunch for participants only – CF Staff only.
- Meet & Greet: Tuesday April 20th at 7pm at Vintners "Fireside Room", in the lobby of the Coast Capri – on your own!

Program Schedule: (subject to change)

Tuesday April 20 – afternoon & evening				
Session Title	Time	Delegates	Location/Room	Facilitator
EDP Roundtable (lunch included)	10:00am 12-1pm	CF Staff Only Participants Only	Riesling	Garry Angus
Self Employment Roundtable	1:00pm - 4:30pm	SE Coordinators	Chardonnay	Larry Widmer
Business Analyst Roundtable	3:00pm - 5:00pm	Business Analysts	Riesling	Charles Cornell
Meet & Greet	7:00pm - 9:00pm	Open to Everyone	Vintners Fireside Lobby	On your own
Wednesday April 21 – Day 1				
Session Title	Time	Delegates	Location/Room	Facilitator
Registration & Breakfast	7:30am	All	Banquet Area	Alexis
General Manager Roundtable	8:30am - 4:30pm	General Managers	Shiraz	Sue Kenny
Real Cash, Real Profit for Financial Professionals	8:30am - 4:30pm	Open to Everyone	Pinot Noir/Merlot	Mike Whitlock
Using the Power of Personality Type to Enhance Your Communication	8:30am - 4:30pm	Open to Everyone	Chardonnay	Kyleen Myrah
CF Staff Lending Course - Pan West Certification (Day 1 of 2)	8:30am - 4:30pm	2 Days - Maximum 20 participants	Riesling	Marie Gallant
Banquet with Guest Speaker	5:45pm - 8:30pm	All Delegates bus transport	Hotel Eldorado Sunroom	Crystal Flaman
Thursday April 22 – Day 2				
Session Title	Time	Delegates	Location/Room	Facilitator
Breakfast	7:30am	All	Banquet Area	n/a
Capital Strategies, Target Solutions for Real Success	8:30am - 4:30pm	Open to Everyone	Pinot Noir/Merlot	Mike Whitlock
A Fine Balance: Enforcing Employee Accountability Without Inviting Legal Action	8:30am - 4:30pm	Open to Everyone	Chardonnay	Veronica Ukrainetz
CF Staff Lending Course – Pan West Certification (Day 2 of 2)	8:30am - 4:30pm	2 Days - Maximum 20 participants	Riesling	Marie Gallant

***Day 1 & 2 - Breakfasts 7:30 am, Breaks 15 mins: 10:15 & 2:30 pm, Lunch 12-1:00 pm**

PROGRAM DESCRIPTIONS & PRESENTERS

Roundtable Sessions (4): Community Futures Staff Only

1) Entrepreneurs with Disabilities Program (EDP) Roundtable:

This roundtable has been added to give Business Analysts, Managers and Self Employment Coordinators an opportunity to openly discuss EDP and how it affects your office:

What works and what doesn't?

What is manageable for your area?

Why is EDP important?

What direction do you want EDP to take in the coming years?

The goals of this session are for attendees to:

Clearly understand EDP: lending considerations/client support/regional support

Share best practices for serving entrepreneurs with disabilities

Share strategies for making successful EDP loans

Give your input on the future direction of EDP

Facilitator: Garry Angus, Provincial Coordinator, Entrepreneurs with Disabilities Program, Community Futures British Columbia

2) Self Employment (SE) Roundtable:

1) Funding renewal discussions – Community Coordinator, Provincial RFP, Regional Approaches

2) Program cooperation and sharing – entrepreneur assessment program, business plan development program curriculum, online training, BC Small Biz

3) Best practices – success stories of what works well for your CF

Goals of roundtable:

1) To leave with ideas how to improve you SE program

2) Have contacts with organizations willing to share and cooperate

3) Help you develop strategies that will improve your program competitiveness when renewing funding

Facilitator: Larry Widmer, CFDC Central Okanagan has been involved with the SE program in several different CFDCs since 1993 in the capacity of Coordinator, GM, Trainer and Consultant and has written several successful funding proposals for SE programming. Larry will strive to facilitate many perspectives of the SE program during roundtable discussions.

3) Business Analyst (BA) Roundtable:

This roundtable will allow for open and free discussion and an agenda will be developed at the session. **Facilitator: Sue Kenny, CFDC Peace Liard**

4) General Manager (GM) Roundtable:

This roundtable will allow for open and free discussion and an agenda will be developed at the session. **Facilitator: Charles Cornell, CF Okanagan Similkameen**

Real Cash, Real Profit for Financial Professionals: Mike Whitlock – Day 1, Level I

This program is designed to expand attendees' understanding of financial statements and financial analyses while deepening their appreciation of the strategic role financial statements play for a financial institution and its clients. The program provides practical tools to evaluate a business' financial health and analyze the impact that capital and other key decisions will have on an enterprise. A key focus is incorporating proper debt structure to foster and support a clients' strategic growth initiatives, thereby enhancing the contributions the institution makes to its clients' success and longevity.

The seminar provides invaluable tools to advisory professionals that will contribute to the success of a client company by improving its cash flow and its profitability. **Real Cash, Real Profit!** Not just theory, but practical insights to manage, improve, and grow a business. The program covers critical financial issues and provides...

- A deeper understanding of financial statements, including the balance sheet and the income statement, and a plan to use these tools to manage and grow a company.
- The ability to use practical analysis to get a better understanding of a company's past to plan for its future.
- The ability to evaluate the revenue required to absorb higher expenses so as to not adversely impact profitability. This will focus on applying contribution margin to strategic decisions.
- Strategic tools to use in evaluating nearly every business decision.

Program participants will come away with practical solutions to understand and improve cash flow, increase profits, and evaluate their clients' and prospects' businesses more efficiently, expediently, and expeditiously. Gain a new appreciate for financial statements and see them as never before!

Capital Strategies, Target Solutions for Real Success: Mike Whitlock – Day 2, Level II

Most companies experience growth in two forms: real and inflationary. Real growth occurs when a company is gaining new clients, expanding market share, and seeing volume increases. Inflationary growth occurs when economic pressures dictate a company raises prices to keep pace with rising commodity prices and costs. And any growth, whether real or inflationary, puts significant pressure on a company's cash flow.

Building upon "Real Cash, Real Profit for Financial Professionals," this advanced session focuses on a company's financial future by analyzing growth and the financial implications increased revenues can have on a company's balance sheet. The program incorporates important tools for advisors and consulting professionals to utilize during the annual account review process to assist clients in analyzing growth, setting goals, determining cash needs, and improving operating efficiencies.

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The combination of more in-depth understanding on the part of the financial professional, more streamlined and effective communication between the relationship manager and client, and the enhanced ability to discuss and determine goals and objectives will enhance and strengthen client/CFDC relationships. Strong business planning and more effective coupling of financial products and services contribute to more successful and financially viable clients. And, by doing so, adds real economic value to a client. By providing creative financial strategies, you will be helping your client reach the Capital of success.



Mike Whitlock, M.B.A., is President of Tannian Consulting, Inc., a recognized leader in providing financial, marketing, and strategic planning services, training, and consulting. Mike has had the pleasure of working at Community Futures' conferences in past years and is delighted to return. Mike has been actively involved in developing practical financial programs for business owners, managers, and advisors for over a decade. His energetic style brings financial management to a level that is appreciated by all levels of business expertise.

Mr. Whitlock holds a B.S. degree in Finance and earned his Master of Business Administration degree from the University of Washington. After working as a commercial banker for nearly 10 years, he began his career in strategic planning, financial consulting, and professional education. He has worked in Canada, the USA, and Australia with a wide variety of corporations and professional associations including Petro-Canada, North American Green, ATB Financial, and Paul Davis Systems.

***Using the Power of Personality Type to Enhance your Communication:
Dr. Kyleen Myrah – Day 1***

Participants in this workshop will learn how personality type preferences can be used to highlight differences in communication styles.

Each participant will complete the Myers-Briggs Type Indicator (MBTI) assessment in advance of the workshop and receive their own personal report. The Myers-Briggs Type Indicator (MBTI) is the most widely used instrument for understanding normal personality differences.

Armed with this insight, the MBTI framework will be used to help you learn about and appreciate your natural communication style. Through interactive exercises and role plays, participants will develop an understanding of other styles and strategies to adapt your communication methods to be effective with any audience, including colleagues, clients, management or community stakeholders.

Discussion in the workshop, as well as additional resources, will also assist the participant in seeing how their personality dimensions impact their leadership style, work preferences and problem solving approaches. Join us for a fun and insightful look "inside" to ensure our communication "outside," with others, is as successful as it can be.



Dr. Kyleen Myrah is an educator, professional speaker, entrepreneur and active member of her community. She is a Professor of Business at the Okanagan School of Business at Okanagan College teaching in the areas of marketing, management and entrepreneurship. She is also President of KyCo Management, a professional speaking and corporate training company speaking on topics such as mentorship, leadership, business development, communication and time management. She is a dynamic and engaging speaker whose preparation, experience and interaction with the audience continue to exceed expectations and provide superior value to every presentation she makes. Believing strongly in the value of community involvement and stewardship, Dr. Myrah has held numerous committee and board positions with organizations such as the Kelowna

Chamber of Commerce, YMCA-YWCA, and Community Futures of the Central Okanagan. She is a sought-after judge for business competitions including the Kelowna Business Excellence Awards and Young Entrepreneurs Competition. Dr. Myrah has received numerous awards for her community and professional work including a Senatorship with the Junior Chamber International, the 2009 John Dobson Faculty Advisor of the Year award, the 2008 Executive CMA Top Talent Award and finalist in the Kelowna Woman of Distinction Awards in the Community Leadership category.

Committed to the importance of lifelong learning, Dr. Myrah has continued her education throughout her career. She has a Bachelor of Arts Honors degree from Queen's University, a Master of Public Administration degree from Dalhousie University, a Doctorate of Education from University of British Columbia, and her Certified Management Accountant (CMA) designation from Simon Fraser University. Dr. Myrah is also a Certified Trainer of the Myers-Briggs Type Indicator Step I & Step II Program.

***A Fine Balance: Enforcing Employee Accountability without Inviting Legal Action:
Veronica Ukrainetz – Day 2***

A challenge made all the more difficult by the economy and tight bottom lines is the difficult job of enforcing employee accountability while minimizing workplace dysfunction and your organization's potential exposure to unionization, arbitrations, wrongful dismissal, human rights and employment standards claims. This workshop will enable you to stay in control and on the high road when dealing with challenging employee situations.

Through performance management, discipline and human rights compliant management of medical leaves; you will achieve one of two acceptable outcomes: (1) a renewed commitment to the organization or (2) a mutually acceptable exit from the organization.

You will also learn how to address employee requests for accommodation, including: (1) identifying whether the request for accommodation raises Human Rights issues; (2) identifying whether the request relates to a disability driven need or a preference; and (3) how to reach a mutually acceptable accommodation.



Veronica Ukrainetz has, throughout her 16 year legal career, restricted her practice to labour relations, employment and workplace related human rights law. Her law firm, Ukrainetz Law Corporation provides strategic legal advice to employers, both unionized and non-unionized. Her clients cover all industries and sectors, including local government, financial institutions, non-profits, the hospitality industry, private health care, private businesses, forestry, transportation, First Nations, colleges and private educational institutes. Veronica is a strong advocate of preventative and proactive employment practices. She encourages her clients to utilize her as a strategic partner, to work co-operatively, but firmly with employees and former employees to resolve issues and to treat litigation as a last, not a first resort.

***Community Futures Staff Lending Course (Pan West Certification):
Marie Gallant – Day 1 & 2***

The Community Futures Staff Lending 2 day training session was created to offer Community Futures organizations consistent lending tools, as well as to introduce Key benchmark standards. The training introduces a guide in the areas of administrative practices, general lending policies and processes, loan monitoring and collections. Included in the training are materials deemed to be Best Practices by Community Futures organizations that make a relatively high number of loans.

The objective of the 2 day workshop is designed to talk to developmental lending and related processes, to assist participants to become more effective as a small business consultant and as a developmental lender. As well you will learn from participant experiences from other Community Futures lending organizations.

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Note: You must take both days. Minimum class size of 5 to a Maximum class size 20



As the Executive Director of Community Futures British Columbia, Marie Gallant leads a member driven association, which services the 34 Community Futures Development Corporations across BC.

Marie first became involved in the Community Futures Program as a volunteer and Board member for the Community Futures Development Corporation of Fraser Fort George in Prince George, BC. As her passion for the Community Futures program and her belief in its values grew, she decided to refocus her career from banking and commercial lending to community economic development within the Community Futures network.

During the past nine years, Marie has worked for the Community Futures Development Corporation of Haida Gwaii on the Queen Charlotte Islands, and as General Manager of Tawatinaw Community Futures in Westlock, Alberta. Marie now works with her volunteer Board to support the BC Community Futures members and lead the network in BC. Marie also sits as a member of Pan West Community Futures and Pan Canadian Community Futures.

Banquet & Guest Speaker – Day 1 evening



Crystal Flaman will be our guest speaker during the dinner. You will laugh, be inspired and learn a few tangible tips on health, wellness and how to create more balance, joy and happiness in your own life. She will share a few stories from her adventures and mis-adventures in life and invite you to raise the bar in your own life, putting your dreams and aspirations first.

Crystal is a Social Entrepreneur and professional speaker / facilitator with boundless energy and an innate ability to help people and organizations achieve their goals. She owns and operates 2 businesses: The Kelowna International Hostel (12 years) and Inspiring Success Services Inc. (8 years). Crystal is an internationally recognized speaker, having worked throughout Canada, Brazil, Denmark, England, Singapore, USA & Australia. She is an author, creator of an inspiring product line called an "Inspiring Tin of Wisdom" and founder of Imagine the Ripple Effect! www.imaginerippleeffect.com

Crystal is an avid athlete and has raised over 1.2 million dollars for charity organizations through her athletic pursuits. Crystal and her twin-sister raised over \$500,000 for the Heart and Stroke Foundation of Canada when they cycled on the first-ever tandem bike to cross Canada. In addition Crystal and colleague Stephanie Moore raised thousands of dollars for Partners in the Horn of Africa when they ran a 100km ultra-marathon. In its 5th year, the "Great Big Run for Africa", now a relay event, has assisted over 10,000 women to start their own businesses in Africa and raising over \$100,000 to date! Crystal also competes in Ironman triathlons and has just completed her 7th Ironman triathlon in Cozumel, attempting to raise \$500,000 for Room to Read! (www.inspiredtogivenow.com & www.roomtoread.org) When she's not running or doing Ironman triathlons, Crystal organizes humanitarian missions to Central and South America and she regularly consults with individuals, businesses and organizations to help them develop their own strategic plans and achieve greater success in their organizations and personally, be more inspired and happier on a daily basis!



Professional Development REGISTRATION FORM

April 20, 21, 22, 2010
Coast Capri Hotel, 1171 Harvey Ave. (Hwy 97), Kelowna, BC

Registration deadline: March 31, 2010

Register online at <http://www.cfokanagan.com/>

(Please fill out one form for each participant!)

Name: _____

Organization: _____

Address: _____

City: _____ Province: _____ Postal Code: _____

Telephone (Bus.): _____ Telephone (Res.): _____

Fax: _____ Email: _____

AGENDA - Please check all that apply:

April 20	<input type="checkbox"/> Entrepreneurs with Disabilities Program Roundtable <input type="checkbox"/> Self Employment Coordinators Roundtable <input type="checkbox"/> Business Analysts Roundtable <input type="checkbox"/> Meet & Greet Social
April 21	<input type="checkbox"/> General Managers Roundtable <input type="checkbox"/> Real Cash, Real Profit for Financial Professionals: Level I <input type="checkbox"/> Using the Power of Personality Type to Enhance your Communication (you must complete the Myers-Briggs Type Indicator (MBTI) assessment in advance of the workshop and prior to April 1st – the instructor will contact you upon registration). <input type="checkbox"/> CF Staff Lending Course – Day 1 of 2 (you must take both days)
April 22	<input type="checkbox"/> Capital Strategies, Target Solutions for Real Success: Level II <input type="checkbox"/> A Fine Balance: Enforcing Employee Accountability without Inviting Legal Action <input type="checkbox"/> CF Staff Lending Course – Day 2 of 2

REGISTRATION FEES

Delegates Fee - \$495 + 5% gst = \$519.75 pp.

Fee includes: All sessions with expert facilitators, materials or handouts, certificates of completion, assessments, all listed meals & transportation to and from Hotel Eldorado.

General Managers Fee - \$275 + 5% gst = \$288.75 pp.

Fee includes: GM Roundtable April 21st & either Capital Strategies or A Fine Balance HR Session April 22nd, materials or handouts, all listed meals & transportation to Hotel Eldorado.

(Note: if you wish to attend the full training, the \$495 fee will apply)

MEALS (I will attend – check all that apply)

Wednesday April 21st:

Continental Breakfast

Lunch

Banquet (Hotel Eldorado)

Thursday April 22nd:

Continental Breakfast

Lunch

(conference ends)

Do you have any dietary restrictions or allergies? Yes No

Vegetarian _____ Food Allergy _____ Other _____

Note: Breakfast, lunch & breaks will be located in the Coast Capri meeting room foyer.

*Breakfasts 7:30 am, Breaks 15 mins: 10:15 & 2:30 pm, Lunch 12-1 pm

PAYMENT INFORMATION

<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>
<input type="checkbox"/>

Cheque

Money Order

MasterCard

VISA

Payment enclosed (cheque or money order only) made out to:
"CF Okanagan Similkameen – PD Registration"

Card#: _____ Expiry Date: _____

Name on Card: _____

ACCOMMODATION:

Delegates have rooms blocked for a special rate at both the Coast Capri Hotel and the Hotel Eldorado in Kelowna. Room booking information is below.

CANCELLATION POLICY Cancellations received prior to March 31, 2010 will be subject to a 10% administrative charge. No refunds will be issued after this date, but substitutions are allowed. Registration and payments should be sent to:

2010 CF Staff Professional Development

Hosted by: CF Okanagan-Similkameen

#102 – 3115 Skaha Lake Road, Penticton, BC V2A 6G5

Tel: (250) 493-2566, Toll Free: 1-877-493-5566, Fax: (250) 493-7966

E-mail: info@cfokanagan.com Website: <http://www.cfokanagan.com>

HOTEL RESERVATIONS:

Option 1: Coast Capri Hotel (location of conference) 1171 Harvey Ave., Kelowna

Delegates - phone hotel directly at 250-860-6060 (ask for in-house reservations) or phone central reservations office toll free at 1-800-663-1144 and quote:

Group Block Name: Professional Development Conference

Group Block Confirmation Number: CCH-GFC9629

Comfort Accommodation: \$109.00 per room / per night plus the applicable taxes. The rate is based on single / double occupancy. Our Comfort Accommodation Rooms consist of 1 Queen Bed or 2 Double Beds.

Superior Accommodation: \$129.00 per room / per night plus the applicable taxes. The rate is based on single / double occupancy. Our Superior Accommodation Rooms consist of 1 King Bed or 2 Double Beds.

Premium Accommodation: \$149.00 per room / per night plus the applicable taxes. The rate is based on single / double occupancy. Our Premium Accommodation Rooms consist of 1 King Bed with a Queen Pullout.

We do have a limited number of rooms available in the hotel with 2 Queen Beds if required.

The Group Block Release Date is also set for **March 20, 2010**. Guests will still be able to make a reservation after this date based on availability.

Hotel Policy on Group Bookings: The cancellation policy for individual reservations is 48 hours prior to the arrival date (4:00PM). No show reservations will be charged one night's room rental fee. An early departure fee of \$70.00 per room for group bookings will be made for guests departing before their confirmed departure dates. Guests will be exempt from this charge if they change their departure dates prior to check in or at time of check in.

Option 2: Hotel Eldorado, 500 Cook Rd., Kelowna (location for dinner)

Phone: 250-763-7500 Toll Free: 1-866-608-7500 www.eldoradokelowna.com

Guestrooms Arms Wing Rate \$149/night plus applicable taxes

Please Note:

- Rates based on availability and valid, April 20-22, 2010
- rates do not include applicable taxes (15%) or Resort Fee (\$7.50/day)
- Rates based on double occupancy
- Rates are non-commissionable
- Guests must call Hotel Reservations directly (not valid for online bookings) and request rates for Community Futures