

# Orange County Business Council 2022—2027 Strategic Plan

## 2022 Activities, Priorities and Performance Measurements

*Presented to OCBC's Executive Committee on behalf of the Board of Directors January 21, 2022.*

**DRAFT**

**Mission: Orange County Business Council** represents and promotes the business community, working with government and academia, to enhance Orange County's economic development and prosperity in order to preserve a high quality of life.

**Goal No. 1: Advocacy.** OCBC shall accomplish its mission by leading a high profile, proactive advocacy program for business interests throughout California and the nation, focusing on four core initiatives:

- **A: Infrastructure:** Increase investment in the construction, management and maintenance of Orange County's infrastructure.
- **B: Workforce Development:** Create a high-quality workforce with particular emphasis on developing math and science skills needed by Orange County employers.
- **C: Workforce Housing:** Increase the supply, choices and affordability of housing for the Orange County workforce.
- **D: Economic Development:** Retain, grow and attract business and high-paying jobs with a focus on global connectivity, innovation and technology.

**Goal No. 2: Research and Communication.** OCBC shall establish itself as the leading, most influential voice of business for the Orange County business community.

**Goal No. 3: Network.** OCBC shall provide a forum for Orange County's business leaders to network with the business and public sector community to proactively address the overall business climate.

**Goal No. 4: Crisis Response.** OCBC shall prepare and tackle any urgent, business-related issues that require immediate decisive action.

**Goal No. 5: Administration.** OCBC shall administer an efficient and effective operation, financially secure, dedicated to attracting and retaining the top leaders of OC business and the finest professional management and staff.

## 2022 Activities

<b>Goal No. 1: Advocacy. OCBC shall accomplish its mission by leading a high profile, proactive advocacy program for business interests throughout California and the nation focusing on 4 initiatives: A. Infrastructure, B. Workforce Development, C. Workforce Housing and D. Economic Development</b>				
Activity	Staff	Performance Metric	Due Date	Results
Educate and engage business leader participation.	Jennifer	Conduct at least 8 well attended meetings for government affairs committee. Pivot back to hybrid/in-person.	Dec 2022	
Outreach to OC Chambers to influence business advocacy from business members and encourage alignment.	Jeff Jesse Jennifer	Conduct as-needed briefings to large business organizations, boards and govt. affairs committee meetings on advocacy.	Ongoing	
Increase opportunities for OCBC to be the voice of business on key regulatory or legislative issues.	Jennifer Jesse Jeff	Recruit/support 3 pro-business candidates for appointments to regional or state boards and commissions.	Dec 2022	
	Kathy Alexis	Provide same-day press statements and social media notices on at least 4 key issues	Dec 2022	
	Jennifer Kathy Connor	Continue communication on government affairs issues and outcomes through advocacy section in regular e-news digital newsletters and dedicated e-blasts.	Ongoing	
	Jennifer Kathy Connor	Feature 5 blog posts, editorials and articles as appropriate to advance legislative strategy.	Dec 2022	
Legislative Action Guide (LAG).	Jennifer Connor Jesse Kathy	Develop streamlined 2023-24 LAG in partnership with members and distribute to government officials.	Dec 2022	

Pursue state-level legislation related to OCBC core initiatives.	Jennifer Connor Jesse	Advocate on bills and advance new legislative proposals consistent with LAG on housing, education and/or infrastructure. Neutralize anti-business bills, special attention to split-roll, rent control and eviction moratoria, tax reform measures, air quality sales tax, water tax and more.	Feb 2022	
	Jennifer Jeff	Testify before legislature and at least two state regulatory agencies on business agenda.	Dec 2022	
	Jennifer Connor	Secure meetings with Senate and Assembly leadership.	Mar 2022	
	Jennifer Jesse	Continue administration of REAL Coalition and pursue legislative platform in alignment with OCBC initiatives, particularly infrastructure, housing, education and economic development.	Jan 2022	
	Jennifer Connor Jeff	Explore opportunities for stronger alignment of region's impact on state leg/regs through LA Chamber and Inland Empire Economic Partnership in advancing So Cal through research, advocacy and political action.	Dec 2022	
Pursue federal legislation related to OCBC core initiatives.	Jennifer Connor	Engage federal legislators and administration in support for OC's receipt of federal infrastructure funding.	May 2022	
	Jennifer Connor	Track federal legislative activity on key bills.	Dec 2022	
	Jesse Jennifer	Advance federal priorities for trade and economic development.	Ongoing	

Strengthen coalition of non-traditional allies to advance legislative agenda.	Jennifer Jesse Kathy	Submit at least one joint op-ed with non-traditional ally.	Aug 2022	
	Jennifer Jeff Jesse	Develop opportunities for dialogue and mutual goals among diverse constituency groups (enviro, union, trades and law), e.g., CEQA reform.	Ongoing	
	Jennifer Jesse Jeff	Educate and advance mutual projects with labor, environmental community, legal community, tourism and hospitality, housing, etc.	Ongoing	
Advocate for pro-business policies among regional regulatory agencies	Jennifer	Advocate OC Reps to MWD, SCAG, AQMD, CTC, CARB, CPUC, Cal/OSHA, RWQCB, CEC, etc. to advance business goals	Jun 2022	
Cultivate strategic political alliances with traditional and non-traditional groups to leverage OCBC's influence to enhance political success.	Jeff Jennifer	Engage PACs of BIA, LA Chamber of Commerce, IEEP, OCAR, OCTax, CAA, West, OCADA, Chamber PACs, Teamsters, Building Trades, OCEA and others to support pro-business appointments and candidates for public office.	Nov 2022	
OCBC Legislative Scorecard	Jennifer Jesse Connor Kathy	Develop and communicate State Legislative Scorecard and Legislators of the Year for OC delegation.	Oct 2022	
Maintain "Early Warning System" on regulatory issues impacting business community.	Jennifer Jesse Kathy	Review agendas for regulatory agencies and engage on regional issues with biz coalitions.	Dec 2022	
	Jennifer Jesse Connor	Review agendas of OC Board of Supervisors, OCTA, water districts and other state and county agencies, and report on business issues.	Ongoing	

Advance Pro-Business Agenda for Future Elections and Leadership.	Jennifer Jesse Connor	Educate local and state leaders recently elected in OC and educate them on key OCBC initiatives.	Nov 2022	
	Jeff Jennifer Jesse	Advocate on Governor Newsom’s budget plan on policy initiatives for business stakeholders.	May 2022	
	Jennifer Connor	Advocate on ballot measures affecting business.	Nov 2022	
	Jennifer Jeff	Collaborate with CA Women Lead to advance women leadership in political and appointed offices.	Apr 2022	
Advance diversity, equity and improved race relations in OC and the region.	Jeff Natalie Jesse Jennifer	Implement Racial Equity Action Plan. Include training previously completed by Jesse, Natalie, and Jennifer.	Dec 2022	
Health Care Reform Initiatives—continue OCBC’s recognition as key business partner in adopted state and federal healthcare reform proposals.  Advocate business-friendly provisions in state/federal health care reform proposals.	Jesse Jennifer Natalie	Hold meetings as needed of Healthcare Task Force. Stay in constant communication with healthcare members to identify policy priorities at state, federal and local level; represent issues through Government Affairs Committee.	Dec 2022	
		Engage and support Doug Freeman’s “Celebration of Heroes” event honoring Covid healthcare heroes.	Apr 2022	
	Jennifer Jesse Connor	Monitor and advance pro-business provisions on state legislation for health care reform, single-payer, and Medi-Cal Stability.	Spring 2022	
	Jesse	Promote health IT and other technological advances to improve efficiencies; link with workforce development programs.	Nov 2022	

	Natalie Lauren	Hold a health care forum on key issues. Net profit goal \$25k.	Aug 2022	
	Jeff	Participate with business interests in OC Health Care Agency Vaccine Task Force to assure expeditious delivery of vaccines. Educate business community.	Jul 2022	
Conduct OCBC Member Trip to Sacramento.	Jennifer Jesse Connor	Secure meetings with non-OC delegation legislators, regulators, key committee chairs, and at least one constitutional officer to advocate OCBC initiatives.	Mar 2022	
	Jennifer Connor Lauren	Attendance from 30 public and private sector members with Advocacy Trip, pivoting back to in-person. Net profit goal \$20k.	Mar 2022	
Conduct OCBC Select Member Trip to Washington, D.C.	Jennifer Connor Lauren	Convene select OCBC members for issue-focused meetings with members of Congress, key committee chairs, administration and top officials to advocate OCBC initiatives and legislation.	May 2022	
	Natalie Lauren	Host Virtual Advocacy Summit. Attendance from 50 at Virtual Advocacy Summit. Net profit goal \$10k.	Aug 2022	
Enhance communications to support goals.	All Kathy Alexis	Continue “between-meeting” communications to keep members informed including e-news and social media promotion of meetings and tying meeting discussions into news via social media.	Monthly	
	Kathy Jeff Alexis	Develop e-news stories for speakers and members.	Monthly	

Business and Industry Legal Defense Fund.	Jeff	Use legal affairs fund to support public policy advocacy in federal and state courts through intervention, amicus and other.	Ongoing	
	Jeff Jennifer	Partner with BILD, CalChamber, Business Roundtable, US Chamber and others on pro-business litigation efforts/PAGA reform.	Ongoing	
<b>BIZPAC</b> <i>(Independent of OCBC—for Information purposes only).</i>	Jennifer	Conduct annual a “non-event” event for fundraising purposes; net \$50K. Assistance from Todd Priest & Associates.	Spring 2022	
	Jennifer	Sponsor 3 fundraising events for officeholders/candidates.	Nov 2022	

• <b>A: Infrastructure: Increase investment in the construction, management and maintenance of Orange County's infrastructure.</b>				
Activity	Staff	Performance Metric	Due Date	Results
Conduct Infrastructure Committee Meetings to develop policy and advocacy.	Jennifer	Conduct at least 8 regular meetings, well-attended, top speakers and issues.	Dec 2022	
Educate public on need for infrastructure funding, accountability, system reforms including gas tax replacement.	Wallace Jeff Jennifer	Include facts in speeches, research, testimony, and other communications.	Summer 2022	
	Jeff Jennifer	Advocate for reauthorization of P3 authority; advance road charge research; incentivize telecommuting, transit system and funding reforms.	Nov 2022	
Advance <b>OCMoves</b> Strategic Plan to enhance funding for Orange County from state and federal sources available.	Jennifer Natalie Jeff	Conduct strategic planning assessment of OCMoves structure and effectiveness and recommend improvements.	Mar 2022	
	Jennifer	Conduct quarterly OCMoves steering committee meetings with high-level briefings.	Quarterly	
	Jennifer Jeff	Host or partner on 3 leadership events with state or federal transportation officials.	Nov 2022	
	Jennifer Jeff	Assist transportation agency members and advocate for OC's fair share of funding.	Ongoing	
	Jeff Jennifer	Influence and lead the 5-county regional transportation coalition, Mobility 21, on OC issues.	Dec 2022	



	Jeff Kathy Jennifer	Generate media awareness of OC transportation issues with 3 media quotes or articles.	Dec 2022	
	Jennifer Kathy Natalie	Improve web presence for OCMoves. Integrate more OCMoves info and successes into OCBC communications collateral.	Sep 2022	
	Jeff	Support OCTA and Caltrans District 12 in their effort to complete improvements including I-405 and SR-55. Advocate for efficiency in Measure M/OCGo funding.	Dec 2022	
	Jennifer Natalie Jeff	Add 2 new OC Moves investors OR RETHINK OC MOVES for 2022.	Nov 2022	
Advocate for an effective local/state toll road system, with connectivity and efficiencies.	Jennifer Jeff	Support South OC traffic relief solutions.	Nov 2022	
	Jennifer Jeff	Advocate efficiencies between TCA/OCTA/Caltrans on OC's toll system and in delivery of mobility improvements.	Nov 2022	
	Jennifer Jeff	Support a comprehensive managed lane strategy for the county highway system.	Nov 2022	
Support protection and Implementation of Measure M2 provisions, review opportunities to assure business-friendly principles are incorporated by OCTA.	Jennifer	Oppose state budget or legislative constraints impacting Measure M2 funding plan.	Jun 2022	
	Jennifer	Advance "early delivery" of M2 projects as needed while opposing project delays and loss of M2 buying power.	Sep 2022	

	Jennifer	Protect local transportation funding sources from state; secure state reimbursement of local funds advanced for state projects.	Dec 2022	
	Jennifer Jeff	Review and neutralize negative impacts of climate change policy proposals and adapt to make them business-friendly.	Dec 2022	
Secure an adequate water supply for OC business.	Jennifer Jesse	Support implementation of State Water Plan, including Bay-Delta improvements.	Nov 2022	
Advocate for OC water technology innovation, desalination, recycling, groundwater replenishment, clean-up and conservation.	Jennifer	Support fiscally responsible, good-for-business seawater desalination efforts, and Cadiz desert water projects.	Dec 2022	
	Jennifer Jeff	Advocate for OCWD to work on a joint agency cooperative cleanup of private property contamination, settle its business litigation for North and South Basin clean up and oppose additional Superfund hazardous waste designations for OC basins.	Nov 2022	
	Jennifer	Support public agency partners to secure appropriate state and federal funding for water infrastructure.	Nov 2022	
Regional government reforms that enhance OCBC's strategic initiatives on infrastructure and housing.	Jennifer Wallace Connor	Influence SCAG and OCCOG to include business issues in regional planning and protect OC's land uses, including input on issues such as SoCal Greenprint.	Ongoing	
	Wallace	Support SCAG's Economic Growth Strategy.	Dec 2022	

	Jennifer Jeff Jesse Natalie Kathy	Participate in regulatory advisory boards to ensure business perspective is included. Encourage business volunteers to apply.	May 2022	
Enhance opportunities to highlight Southern California issues and solutions.	Jeff Jesse	Advance So Cal issues in annual California Economic Summit with Cal Forward.	Dec 2022	
Climate Change/Energy	Jeff Jennifer Connor	Advance solutions to address conflicts between state's climate change goals and state's housing goals.	Ongoing	
	Jennifer Connor	Convene members for dialogue on energy/climate change issues and impacts on business.	Dec 2022	
	Jeff Jennifer Connor	Advocate for reliable, balanced, and competitive energy solutions for businesses.	Ongoing	
Airport infrastructure enhancements.	Jeff	Protect John Wayne Airport and promote service enhancements and opportunities for new markets.	Ongoing	
	Jennifer Jeff	Support JWA Port of Entry status.	Dec 2022	
	Jeff Jennifer	Support enhancements and development of Ontario International Airport.	Ongoing	

Regional broadband efforts	Jennifer Wallace Jesse Connor	Advance OC priorities for improving broadband access and closing the digital divide through new LA/OC Regional Broadband Consortium and other regional policy discussions.	Dec 2022	
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<ul style="list-style-type: none"> <li><b>B: Workforce Development: Create a high-quality workforce with particular emphasis on developing math and science skills needed by Orange County employers.</b></li> </ul>				
Activity	Staff	Performance Metric	Due Date	Results
Advance existing partnerships with local workforce boards, educational institutions and regional non-profits.	Jesse Wallace	Provide strategic input to OC, Santa Ana, and Anaheim WDBs to advance their mission.	Nov 2022	
	Jesse	Promote Postsecondary institution career center employer engagement programs	Ongoing	
	Jesse	Work with OC United Way on their United for Financial Security Leadership Council.	Nov 2022	
Keep OCBC's Workforce Committee focused on hiring from local educational institutions by building strong cradle to career pathways that meet the needs of employers.	Jesse	Hold nine impactful Workforce Development Committee meetings.	Nov 2022	
	Jesse	Advance K-16 partnerships with groups such as OC Pathways, Orange County Regional Consortium and University members with at least two target industry cluster Business Advisor meetings.	Nov 2022	
	Jesse	Complete JP Morgan Chase grant for Healthcare Industry Talent Pipeline	Jul 2022	
	Jesse	Host a roundtable with business and legislators (or staff) on expanding Early Childhood Education in California.	Aug 2022	

<p><b>LEA Initiative:</b> Enhance community coalitions and a countywide communications program aimed at conveying to immigrant families the necessary skills to ensure successful students and increase college enrollment and reduce the education achievement gap.</p>	Jesse	Hold eight, well-attended LEA committee and executive meetings to advance strategy.	Nov 2022	
	Jesse	Plan and implement an annual LEA Showcase with profit to OCBC.	Sep 2022	
	Jesse	Grow LEA to include three more school districts or community groups.	Nov 2022	
	Jesse	Promote LEA to two school districts outside Orange County.	Nov 2022	
	Jesse Jennifer	Elevate awareness of LEA	Nov 2022	
	Jesse	Develop draft LEA Program Grant proposal including two case studies and program budget model to secure foundation support for ongoing operations	Sep 2022	
	Jesse Kathy Alexis	Incorporate Pre/Post Survey, Data Collection, and material requests via LEA webpage	Sep 2022	
<p><b>Workforce Development Conference:</b> Develop Program and Facilitate with the OCDB</p>	Jesse Natalie Lauren	Attendance of 200 with 1/3 business, educators and legislators. Net profit goal \$15k.	Oct 2022	

<p>Partner in publishing an annual Orange County State of the County Workforce Indicators Report, emphasizing OCBC workforce goals and measurement of trends against targets.</p> <p>Elevate media awareness of workforce development issues.</p>	<p>Wallace Jesse Kathy Natalie</p> <p>Jesse Wallace Kathy</p> <p>Jesse Wallace</p>	<p>Distribute 750 reports. Market report findings to media, conduct event, secure sponsorships.</p> <p>Place two op-eds on workforce development related issues/events, including LEA.</p> <p>Pursue “Strong Workforce” objectives through community college collaborative.</p>	<p>Oct 2022</p> <p>Dec 2022</p> <p>Nov 2022</p>	
<p><b>Early Childhood Education Initiative:</b> Partner with the OCDE, Cal Strategies, Newsom administration, legislators and business improving efforts for quality preschool.</p>	<p>Jesse</p> <p>Jesse</p>	<p>Provide business input and advocate efficiencies to OCDE and State re comprehensive pre-school program, transitional kindergarten and possible legislation.</p> <p>Identify and advocate with California Preschool Business Advisory Council on Early Childhood Education (ECE) policy.</p>	<p>Ongoing</p> <p>Nov 2022</p>	
<p><b>Legislation:</b> Continue state partnership with the REAL Coalition Education and Workforce Sub-Committee and develop a national platform on education with the National Skills Coalition.</p> <p>Investor/Member Engagement: Marketing Workforce Development.</p>	<p>Jesse</p> <p>Jesse Natalie</p>	<p>Identify and advocate for local control of school districts, funding, education governance reform and STEAM</p> <p>Advocate and promote workforce development activities and regularly engage with members on behalf of their companies.</p>	<p>Nov 2022</p> <p>Ongoing</p>	

<b>Emerging Social Issues:</b>	Jeff Jesse Kathy	Advance and promote healthy race relations and diversity in workforce development	Ongoing	
	Jeff	Establish an action plan for addressing DEI	Ongoing	



• C: Workforce Housing: Increase the supply, choices and affordability of housing for the Orange County workforce.				
Activity	Staff	Performance Metric	Due Date	Results
Secure a sustainable source of funding for Workforce Housing.	Jeff Jennifer Connor	Assist OC United Way in eliminating homelessness; advance HOMEFUL Foundation efforts to fund homeless programs.	Ongoing	
	Jesse Jennifer	Advocate for OC's share of state funding for affordable housing partners.	Dec 2022	
	Jeff Connor	Assist OC Housing Trust with fundraising and project approval goals.	Jun 2022	
	Jennifer Connor	Explore and educate on innovative workforce housing financing models.	Ongoing	
Disseminate and elevate OC Housing Scorecard results and findings to the community.	Wallace Natalie Jennifer Connor	Promote housing scorecard results with city councilmembers, planning commissioners, media ACC-OC, League of Cities, Realtors®, builders and business community. Update Housing Scorecard data in preparation for 2023 release.	Dec 2022	
Elevate OC housing issues and priorities.	Kathy	Seek media coverage to elevate OCBC's profile as a leader in workforce housing advocacy.	Dec 2022	
	Jennifer Connor	Enhance partnerships to educate the broader community on housing issues.	Dec 2022	
	Connor Jennifer	Reduce barriers to achieving additional housing supply.	Ongoing	

	Jeff Wallace	Promote scorecard and retail study as an opportunity for other counties and advance OCBC's research department.	Aug 2022	
Position OCBC as a policy resource center for cities and builders to increase housing supply.	Kathy Connor Wallace	Develop OCBC website page as a resource tool for housing advocacy.	Nov 2022	
	Kathy Jennifer Connor Alexis	Feature economic and demographic data that supports housing industry through social media and e-news.	Ongoing	
Workforce Housing Committee.	Jennifer Connor	Conduct 4 well attended committee meetings with top speakers on key issues, especially increasing housing supply.	Quarterly	
Advocate for new OC housing projects.	Jennifer Connor	Provide testimony or other support for development projects that add to the supply of housing.	Dec 2022	
	Jeff Jennifer Connor	Partner with SCAG and SoCal based developers to advocate for funding for SoCal/OC Projects.	Ongoing	
	Jennifer Connor	Provide support or facilitate meetings for affordable housing providers, including Jamboree.	Spring 2022	
	Jennifer Connor	Advocate for legislation to improve building environment or increase the quantity and variety of homes.	Fall 2022	
Regional Housing Needs Assessment (RHNA)	Jennifer Connor Wallace	Assist OC cities in assessing RHNA allocations/housing element compliance and advocate for reasonable reforms and implementation.	Spring 2022	

CEQA Modernization.	Jennifer Connor Jeff	Advocate legislative fixes to CEQA, especially Holland & Knight's recommendations: CEQA lawsuits must disclose identity and interests; duplicative lawsuits eliminated; project approvals may only be voided if public health, irreplaceable tribal resources or ecology where threatened.	Summer 2022	
Encourage decrease in "Millennial Flight" from Orange County.	Jesse Kathy Alexis	Develop and implement a strategy to keep well-educated from leaving, while growing high paying jobs. Highlight the "cool factor" of the region, holding events and encouraging conversation around the issue.	Nov 2022	

▪ **D. Economic Development: Retain, grow and attract business and high-paying jobs to Orange County, with a focus on global connectivity, innovation and technology.**

Activity	Staff	Performance Metric	Due Date	Results
Economic Forecast Conference – conduct in collaboration with Cal State Fullerton to provide economic trends affecting Orange County Businesses and provide information for management’s strategic planning process.	Lauren Natalie Kathy Alexis	In-person attendance 600 guests or hybrid format. \$40K net to OCBC. Ensure OCBC’s yearly theme integral to Conference.	Oct 2022	
Economic Development Committee Meetings.	Jesse Jeff	Conduct 5 well attended committee meetings with top speakers on key issues that promote innovation, growth, and investment in Orange County.	Dec 2022	
Economic Development Forum.	Jesse Lauren Natalie	Hold ED Forum. \$15K net profit. Consider Energy as focus.	Jun 2022	
Turning Red Tape Into Red Carpet Awards.	Connor Jennifer Lauren Kathy Alexis	Hold Turning Red Tape into Red Carpet Awards and Reception \$10K profit.	Nov 2022	
Continue Economic Development Activities to retain and attract companies.	Jesse	Distribute site location leads to OC cities and/or commercial brokers in coordination with GO-Biz and via Location OC.	Dec 2022	
	Jesse	Develop relationships with Site Selectors, and non-local business news outlets to build more awareness about the benefits of being in Orange County.	Dec 2022	

	Jeff	Assist CEOs engaged in economic development and learning about OC issues.	Dec 2022	
Support development of key and emerging OC industry clusters.	Jesse Wallace	Pursue grant opportunities relating to strategic industry cluster growth opportunities.	Dec 2022	
	Jesse	Support United Nations conference in Anaheim on Artificial Intelligence.	Sep 2022	
	Jesse	Support the growth of Artificial Intelligence in Orange County, especially in the pursuit of making Orange County the healthiest county in the country.	Ongoing	
Maintain Current Economic Research and Strategies to Grow OC and California Economy.	Jesse Wallace Jennifer	Support So Cal Economic Development Strategy through SCAG and GLUE Council.	Dec 2022	
	Jesse Wallace	Finalize decision on whether Orange County should become its own MSA	Nov 2022	
Market OC Economic Development Resources.	Jesse Kathy Alexis	Market LocationOC via social media presence.	Dec 2022	
	Jesse Natalie	Develop PR campaign to boost Orange County's presence in high wage industries.	Sep 2022	
	Jesse Jennifer Wallace	Use Retail Study to encourage cities to upgrade both retail and commercial properties, for revenue enhancements and housing production.	Jul 2022	

Enhance OCBC presence in global connectivity and international trade.	Jesse Wallace	Promote OC global connectivity and international trade via strategic partnerships, delegation briefings, and guest speakers.	Dec 2022	
Innovation and technology.	Wallace Jesse Natalie	Support and engage emerging technology community in OCBC, including OCTANe, SustainOC, UCI's COVE.	Ongoing	
Attracting foreign direct investment.	Jesse Wallace	Collaborate with the five counties in the LA Designated Market Area to identify opportunities for foreign direct investment.	Ongoing	

**Goal No. 2: Research and Communication. OCBC shall establish itself as the leading, most influential voice of business for the Orange County business community.**

Activity	Staff	Performance Metric	Due Date	Results
Partner with key public agencies and community organizations in publishing an annual Community Indicators Report, emphasizing economic issues, quality of life measurements, and trends in education, health care, environment and infrastructure.	Wallace Jesse Kathy Alexis	Distribute report summary, post online, market OC, and participate in roll-out event.	Sep 2022	
	Wallace Jeff	Enhance economic and business climate data in Community Indicators to members and influencers.	Sep 2022	
	Natalie Lauren	Hold report roll-out event with 250 in attendance. Host Community Indicators Steering Committee Meetings as needed.	Oct 2022	
	Natalie Vicki	Use as marketing tool for membership recruitment.	Ongoing	
Increase quality and quantity of communications to educate members, public and influence decisions.	Kathy Alexis	Issue at least 12 press releases/statements on OCBC interests.	Dec 2022	
	Kathy Jeff	Submit at least 4 op-eds/Eyes on the Ball on organization and member priorities.	Dec 2022	
	Kathy	Submit at least 4 op-eds/Letter to the editors from OCBC VP's	Dec 2022	

	Kathy Jeff Alexis	Conduct informal video/audio interviews with OCBC guests for website and social media.	Dec 2022	
	Kathy	Enhance opportunities for cable TV and radio interviews, with 4 on-air interviews.	Dec 2022	
	Kathy Alexis	Develop an OCMoves “special edition” newsletter or column for e-Indicator.	Dec 2022	
	Kathy Alexis	Enhance e-Indicator newsletter to improve share-ability and drive traffic to the website.	Dec 2022	
	Kathy	Modify website to feature dynamic content on Home landing page, including prominent investors, news, member profiles, video, etc.	Sep 2022	
	Kathy Natalie Vicki	Develop mid-year member update on OCBC accomplishments.	Jul 2022	
Continue additional contract research, economic analyses and other “non-dues” revenue sources.	Wallace	Add 2 new clients, including economic analysis for Southern California Association of Governments as Chief Economic Advisor and lead economic team	Dec 2022	
	Wallace Jesse Natalie	Copyright/trademark protection for research reports and other OCBC material.	Oct 2022	



Educate investors and prospective members on advocacy issues via web and social media.	Kathy Alexis	Increase website traffic and track visitors, expand audience by 2.5% a quarter (10% year-end).	Dec 2022	
	Kathy Alexis	Monthly reporting on metrics, increase e-mail list by 1.0% per month (70 contacts/month)	Dec 2022	
Enhance membership kits.	Kathy Natalie Vicki	Update as needed collateral materials to support prospecting and member retention.	Ongoing	
Cultivate and expand alternative outlets for OCBC messages.	Kathy Alexis	Publish 5 articles in targeted, high distribution trade publications or Association newsletters.	Dec 2022	
	Kathy Alexis	Identify creative outlets for info <u>in addition to</u> Register, Charter and COX.	Dec 2022	
	Kathy	Secure publication of one op-ed in LA Times and 2 articles in OCBJ.	Dec 2022	
	Jeff Kathy	Enhance OCBC archives with UCI preserving history and accomplishments to secure OCBC's part of OC's history.	Dec 2022	
	Natalie Vicki Kathy	Develop a strategy to seek OCBC e-Indicator as a link in member company newsletters and websites.	Dec 2022	

	Natalie Kathy	Secure advertising campaign in OCBJ to continue enhancing OCBC's brand and mission within business community.	Ongoing	
OCBC Member Recognition Program.	Natalie Vicki Kathy	Place board member profiles in outside publications, e.g., OCBJ.	Dec 2022	
	Kathy Vicki Alexis	Implement investor recognition program on social media.	Dec 2022	
	Vicki Kathy Alexis	Biweekly featured investor spotlight in e-news, posted on OCBC website & social media.	Ongoing	
	Natalie Vicki Kathy	Call out new members in e-Indicator newsletter; create a web directory of investors with links and descriptions.	Ongoing	

<b>Goal No. 3: Network. OCBC shall provide a forum for Orange County's business leaders to network with the business and public sector community to proactively address the overall business climate.</b>				
<b>Activity</b>	<b>Staff</b>	<b>Performance Metric</b>	<b>Due Date</b>	<b>Results</b>
Annual Dinner – forum to install officers and board, honor outgoing chair, encourage continued membership and participation in OCBC by honoring significant contributions of members and economic development contributions of high-quality individuals and companies in Orange County.	Lauren Natalie Jeff Kathy Alexis	Attendance of 600. \$70k net to OCBC. Obtain Keynote Speaker recognized as of the highest quality and desirability, develop 2022 theme.	Feb 2022	
Chairman's Leadership Breakfast Series.	Natalie Lauren	Secure speakers for 3 Chairman's Leadership Breakfasts net \$3,000 each. Find new consistent venue to host.	Quarterly 2022	
Board Members Engagement.	Jeff Natalie  Natalie Vicki	Hold one-on-one board member meetings with President  Maximize outreach and OCBC knowledge and develop bench of future leaders by holding briefings and orientation meetings at member's office.	As needed  Ongoing	
High Level Networking.	Natalie Lauren Jeff	Develop exclusive event for Board Members and Investors.	Dec 2022	

	Natalie	Create list of target Investors and invite as OCBC guests to high content event OCBC events (Annual Dinner, Workforce Development Conference, Economic Development Forum and Economic Forecast Conference)	Ongoing	
	Natalie Vicki Jeff	Conduct “member orientation” to engage new members.	Ongoing	
	Jeff Natalie	Convene a meeting of Chairman’s Leadership Caucus to report on OCBC efforts and outreach top level issue development ideas.	Ongoing	
	Kathy Alexis Lauren	Develop and implement events marketing social media strategy incorporating key teaser information for events throughout Facebook, LinkedIn, Twitter and Instagram.	Ongoing	
Meeting Investors’ needs identify key goals and objectives, issues and concerns.	Natalie Vicki	Conduct at least 5 meetings a week to engage with key investors and members.	Ongoing	

<b>Goal No. 4: Crisis Response. OCBC shall prepare for, and tackle, any urgent, business-related issues that require immediate decisive action.</b>				
<b>Activity</b>	<b>Staff</b>	<b>Performance Metric</b>	<b>Due Date</b>	<b>Results</b>
Highlight OCBC's success in crisis management, promote and brand the organization as a leader in this regard.	Kathy Natalie Vicki	Develop website case studies and marketing brief highlighting OCBC's past leadership in crisis management, e.g., bankruptcy, race relations, I-405 "pivot" strategy, SR-241 facilitation.	Dec 2022	
Adopt crisis/issues management protocol for internal and external application.	Kathy	Develop policies and procedures for identifying, assessing and responding to crises or issues impacting investors, members and OCBC.	Dec 2022	
COVID-19 Response	Jeff OCBC Team	Continue county leadership in protecting health and business recovery in 2022. Tell the OCBC story.	Dec 2022	

<b>Goal No. 5: Administration. OCBC shall administer an efficient and effective operation, financially secure, dedicated to attracting and retaining the top leaders of OC business and the finest professional management and support staff.</b>				
Activity	Staff	Performance Metric	Due Date	Results
<b>Operations</b>				
Efficient and effective operation.	Danette Natalie	Ensure proper accounting, controls and invoicing compliance with all government grants and contracts.	Ongoing	
	Danette	Complete annual financial and contract/grant audits, including evaluation of internal controls with “unmodified” opinions.	Dec 2022	
Maintain high quality of professional and support staff.	Jeff Danette Natalie	Retain, grow and assess full staff—engage communications, events, legal and legislative support on a contract basis, as necessary.	Ongoing	
Support professional educational and life-long learning of OCBC staff.	Jesse Kathy Jennifer Jeff	Enhance and expand intern program.	Apr 2022	
Cybersecurity training.	Vicki	Update cybersecurity training for staff.	Summer 2022	
Maintain and manage office technology.	Vicki	Upgrade office technology to support hybrid meeting format.	Summer 2022	

Revenue				
Meet 2022 budget by increasing membership and sponsorships of events.	Natalie Lauren Vicki	Ensure Investor retention rate of 90%, and reach new investor base (including OCMoves) of \$1,485,000, per budget.	Dec 2022	
	Jeff Natalie Vicki Danette	Work with Membership Chair to develop a plan for board members' success in supporting OCBC membership growth.	Ongoing	
	Natalie Vicki	Enhance membership retention plan including development of a packaging approach	Mar 2022	
Reserves.	Danette	Maintain 25% reserves invested per approved investment policy with Merrill Lynch.	Ongoing	
	Danette	Conduct regular investment portfolio and asset manager review with OCBC Treasurer and Investment Committee.	Ongoing	
Event and Committee Management.	Natalie Danette Lauren	Track attendance, revenue, sponsors and news coverage for each event for budget consistency. Assess possibility of pricing increase.	Ongoing	
	Lauren Kathy	Conduct event and committee satisfaction surveys as needed.	Ongoing	

OCBC Annual Event Menu	Natalie Kathy Lauren	Prepare menu of annual events and early registration for events.	Feb 2022	
Maintain Investor Billing System	Vicki Natalie	Update contacts, generate invoices and conduct collections.	Ongoing	
<b>Marketing OCBC (and member companies)</b>				
Market OCBC services, member-to-member benefits to enhance strategic initiatives.	Natalie Vicki	Continue connecting members with each other via introduction letters or email introductions.	Ongoing	

NOTES: