Greater Irvine Chamber

Strategic Plan

2017-2018

Presented by President & CEO Bryan M. Starr
June 27, 2017
SENIOR EXECUTIVE COMMITTEE OFFICERS

Chairman: Jim McDonald

**Goal 1:** Develop strategies and new programs to attract more new members and better serve the current members.

**Goal 2:** Update the Chamber’s principal programs to make them more relevant and substantive.

**Goal 3:** Restructure the Chamber’s advocacy function to make it more impactful.

Senior Vice Chair: Dan Han

**Goal 1:** Lead the Board Development Committee with the objective of identifying and attracting candidates for the Board who represent the broad diversity of area businesses and who have the potential to become future leaders of the Chamber.

**Goal 2:** Attend meetings of various Chamber committees in order to become more familiar with the day-to-day operations of the Chamber in preparation for service as Board Chair.

**Goal 3:** Establish relationships with Irvine city leaders in order to establish effective lines of communication while serving as Board Chair.

Vice Chair & CFO: Traci Tran

**Goal 1:** Present complete and accurate financial statements of the Chamber and BED to the Board and Executive Committee on a timely basis.
  - **Action:** Meet monthly to review internally produced financial statements.
  - **Action:** Meet with Executive Committee monthly and Board bimonthly to review financial results.

**Goal 2:** Ensure that the budget for the organization is monitored and measured against actual results.
  - **Action:** Meet monthly to review budget to actual results and present details of discrepancies to the satisfaction of the FAC.

**Goal 3:** Strengthen internal controls.
  - **Action:** CFO and Controller to execute a joint review of internal controls and recommend adjustments to CEO by FYE.
- **Action**: Controller to present budget to FAC at May meeting.
- **Action**: FAC to propose revisions and recommend final budget to Board of Directors for approval.

Vice Chair & General Counsel: Barry Rodolff

**Goal 1**: Provide comprehensive legal representation with regards to a variety of legal issues involving the Chamber.

**Goal 2**: Ensure as legal counsel to the Board of Directors and the executive committee that any matters of legal significance are appropriately handled.

**Goal 3**: Ensure that all of the charter documents are updated and streamlined to ensure proper legal compliance.

**Goal 4**: Provide content to the Chamber publications regarding legal issues on an as-needed basis.

Past Chair: Albert Napoli

**Goal 1**: Support the Current Chairman of the Board and CEO of the Greater Irvine Chamber
- **Action**: Attend all executive and board meetings
- **Action**: Attend all programs and events that require board attendance and additional ones I’m asked to attend.
- **Action**: Act as an advisor to current chair, executive committee and board members to provide continuity on current strategic plan activities, programs and goals and to provide institutional knowledge for new board members.

**Goal 2**: Act as an ambassador on behalf of the chamber to the Irvine Business and Civic community
- **Action**: Attend events, meetings and functions important to have a Greater Irvine Chamber presence.
- **Action**: Meet with any individuals important to have a Greater Irvine Chamber representative present at said meeting
- **Action**: Participate in programs with our community partners, helpful to have Irvine Chamber participation in.
BUSINESS & ECONOMIC DEVELOPMENT/TOURISM

Vice Chair: Jeff Davis | Department Head: Linda DiMario

ECONOMIC DEVELOPMENT

Goal 1: Foreign Direct Investment
- **Action:** Continue to work with currently identified hot prospects and qualified contacts to secure a commitment from at least one (1) company presence in Irvine within the next fiscal year.
- **Action:** Continue to work the U.K. to develop and connect with at least 30 qualified life science companies in some stage of decision-making about expanding their presence in California, specifically Irvine/OC area within next two years.

Goal 2: OC World Trade Week Breakfast & Forum
- **Action:** Increase event attendance by at least 10%; increase sponsor revenue with number of sponsors in Advocate and Supporter to ten (10) and generate $5,000 in revenue for the Greater Irvine Chamber.

Goal 3: Business Outreach Rally
- **Action:** Conduct two (2) volunteer-driven business outreach rallies (April and October); complete at least 400 business calls; collect at least 100 completed surveys.

Goal 4: New Business Outreach Campaign
- **Action:** Send monthly postcard to all new companies in Irvine; expose at least 1,000 new companies to the Chamber’s business resources and membership opportunities.

DESTINATION IRVINE

Goal 5: Strategic Tourism Marketing
- **Action:** Launch next stage geo-targeted, influencer campaign targeting Visitor patterns to greater Irvine area, Northern California (SF Bay Area, San Jose, Silicon Valley area), Arizona and Texas with CBS, NBC or Travelocity broadcast marketing and online; leisure travel focusing on Irvine’s unique food, diversity, proximity to attractions and regional assets and urban/outdoor recreation; seeking similar performance as in first phase: over 2 million impressions and 35,000 click thrus to DI website.
Goal 6: Orange County Visitor Association Collaborations
- **Action**: Participate in S.F. Bay Area campaign: anticipating a duplication of first phase performance: 1 million social media impressions; 5,600 unique website views, 31 million P.R. impressions.
- **Action**: Continue to participate and leverage cost-effective, cooperative marketing campaigns with the Orange County Visitors Association membership in China and North America that multiply Irvine’s impact in the national and international markets.

Goal 7: Sports & Special Events Market Goals
- **Action**: Leverage sports tradeshows, networks, partnerships and connections in the sports tournament industry to optimize booking of facilities for revenue and hotel occupancy.
- **Action**: Book 9,000 room nights valued at $500,000 or more in economic impact for Irvine and Irvine hotels.

Goal 8: Meeting/Conference Sales Goals
- **Action**: Leverage custom online direct messaging, tradeshows, cultivation of third party multipliers, participation in partner events, strategic implementation of incentive programs (Business Development Fund, Loyalty Pays Off and Meetings Incentives) execute a direct sales plan that delivers high-rated ADR meeting business during need periods for Irvine hotels; focus on California corporate, Arizona and Texas headquarters; work vertical markets in biotech and IT as well as digital arts and media.
- **Action**: Book 18,000 room nights in corporate meeting, association or group business during need periods.
MARKETING & COMMUNICATIONS

Vice Chair: Kim Sherman | Department Head: Laura Perdew

**Goal 1:** Support the Chamber’s vertical integration:
The Marketing and Communication’s Committee will provide support for vertical integration of the Chamber’s departments and programs to achieve improved cross-department collaboration and increased member/partner engagement.
  - **Action:** Conduct intake discussions with each department head to determine their needs for marketing and promotion.
  - **Action:** Research technology/tools for improved efficiency and measurable metrics.
  - **Action:** Provide a report of research and make recommendations for solutions to increase awareness and engagement across departments.
  - **Action:** Provide assistance with implementation and ongoing management of technology and strategies where necessary.

**Goal 2:** Provide Promotional Support for Chamber Programs
The Marketing and Communication’s Committee will investigate and implement digital tools to promote and market Chamber programs, aimed at increased and measurable awareness and to track engagement.
  - **Action:** Research ahead-of-the-curve technology/tools for measurable targeted marketing.
  - **Action:** Provide assistance for creating marketing plans.
  - **Action:** Implement new marketing tools.
  - **Action:** Provide and interpret marketing analytics.
  - **Action:** Provide action plan surrounding analytics results.

**Goal 3:** Capture information to support an increase in revenue
The Marketing and Communication’s Committee will use the latest digital technology tools to develop mechanisms to turn results from analytics into measurable revenue, e.g., membership & event attendance.
  - **Action:** Research ahead-of-the-curve technology/tools to remarket to targeted audience.
  - **Action:** Implement digital tools that simplify the process for returning and potential members and guests to join the Chamber, register for events, and share details of activity via social media.
  - **Action:** Provide analytics that clearly identify increased activity, in percentages and actual numbers.

**Goal 4:** Provide support for website optimization
The Marketing and Communication’s Committee will provide ongoing support to maximize the performance of Chamber’s website.
  - **Action:** Provide periodic audits of the website to identify strengths and weaknesses.
  - **Action:** Make recommendations for solutions.
  - **Action:** Provide assistance for improved reporting of meaningful analytics.
**Goal 5:** Establish media presence across print, television and radio
The Communications department will increase earned media by 60%, positioning the Chamber as a resource for business-related information, and its leadership as experts and thought leaders on topics including: business and economic development; lifescience, technology and innovation sectors; and local, state, and national level legislative issues affecting business in the region.

- **Action:** Secure 12 OpEd pieces, authored by Chamber leadership, for inclusion in metropolitan area newspapers and business publications.
- **Action:** Secure 12 radio and five television interview/appearances featuring Chamber leadership.
- **Action:** Increased pitched stories by 50%.
- **Action:** Increase reporting on Chamber activities as stories in *Weekly Connection: Chamber Breaking News* by 80%.

**Goal 6:** Produce promotional pieces
The Communications Department will produce professional-quality videos and PowerPoint presentations for promotion of the Chamber.

- **Action:** Develop narrative, objectives, storyboards, and production timeline for two videos:
  - General overview of the Chamber
  - The President’s Welcome/Overview
- **Action:** Develop narrative, objectives, storyboards, and production timeline for Chamber/leadership overview for “elevator pitch” PowerPoint presentations.
GOVERNMENT AFFAIRS

Vice Chair: Kate Klimow | Department Head: Whit Peterson

Goal 1: Update and reconstruct the Legislative Policy Handbook to reflect current policy stances and to coordinate with political cycles
  • Action: Engage member companies to provide feedback about policies that affect them
  • Action: Provide the Board the opportunity and time to review updates and changes.

Goal 2: Restructure the Government Affairs Committee
  • Action: Absorb the Legislative Affairs Committee functions by creating an appointed voting body to review and take actions on issues not covered by the Legislative Policy Handbook
  • Action: Change the necessary by-laws to reflect the changes proposed
  • Action: Increase member participation and attendance at monthly Government Affairs Meetings by continuing to schedule speakers and market the meetings well in advance

Goal 3: Beta test a business delegation trip to Sacramento in conjunction with CalChamber’s May 2018 Capitol Summit to engage our member companies and provide a voice for Irvine.
  • Action: Organize an Irvine business leaders group of 15-20 attendees to lobby and meet with state representatives in Sacramento.

Goal 4: Continually engage with the Irvine City Council to express priorities and push business friendly initiatives.
  • Action: Have an active and visible presence at City Council, Planning Commission, and Transportation Committee meetings.
  • Action: Review agendas and proposals to find opportunities for the Chamber voice to be heard.

Goal 5: Support the Mayor’s Business Council
  • Action: Be an active participant and provide a voice for the Chamber
  • Action: Introduce appropriate member businesses to the Council

Goal 6: Create more alignment with the Economic Development Committee and International Development
  • Action: Hold periodic Government Affairs meetings with a focus on EDC and ID
  • Action: Engage more frequently with the Gov. Affairs side of economic development and support their mission

Goal 7: Increase the effectiveness and political influence of ICEPAC
  • Action: Consider changing the name of the PAC to reflect more of a regional impact
  • Action: Create a goal to raise $50,000 to increase political activity
  • Action: Develop a strategic spending plan to outline priorities and
  • Action: Work with regional business groups to compound efforts
MEMBERSHIP

Vice Chair: Scott Schultz | Department Head: Jessica Welch

Goal 1: Increase membership from by 9% by year-end by attracting new members and increasing the retention rate.
- **Action:** Hire a high-level membership sales staff member by August 1, 2017.
- **Action:** Create an incentive program for all staff members by September 1, 2017.
- **Action:** Develop a referral program partnering with member restaurants to provide gift cards as incentives. Create corresponding marketing pieces for print and online.
- **Action:** Increase retention rate from 76% to 80% by June 30, 2018.
  - Create an incentive plan for membership sales staff for first-year renewals.
  - Develop an ongoing member anniversary recognition program for 5, 10, 15 and 20 year members.

Goal 2: Simplify and reformat membership tiers and packages to make more user-friendly, innovative and accessible.
- **Action:** Review current membership benefits and tier structure and recommend any changes, consolidations or additions by July 30, 2017.
- **Action:** Revise membership levels and descriptions on all print materials and websites by August 30, 2017.
- **Action:** Create a more user-friendly online portal for potential members to review all levels of membership and corresponding benefits by September 30, 2017.

Goal 3: Recruit 7 Irvine-headquartered large businesses as high-level members
- **Action:** Put together a taskforce of volunteers to include Board members, general membership and support staff by July 15, 2017.
- **Action:** Identify the top 20 Irvine-headquartered businesses with 150 or more employees by August 15, 2017.
- **Action:** Develop strategic outreach plan for engagement specific to each company to include identifying ideal company representatives and methods of involvement based on their goals and initiatives. To launch August 30, 2017.

Goal 4: Increase participation in the Chamber’s Affinity Programs and increase revenue by 10%
- **Action:** Research and identify an additional robust affinity program to implement by January 1, 2018.
- **Action:** Include promotion in all potential member areas of the website, membership tiers and marketing materials, as well as ads in printed event programs.
EVENTS

Vice Chair: Carissa Bechtlof | Department Head: Jessica Welch

**Goal 1:** Increase attendance at all signature events by 10% through future calendaring, strategic marketing and partnerships.
- **Action:** Establish dates and locations for events 12 months out by January 1, 2018.
- **Action:** Develop a marketing piece that encompasses dates, locations and sponsorship opportunities for a 12-month period of events.
- **Action:** Identify community/regional partnerships for each event (as appropriate), thereby expanding the potential marketing audience.
- **Action:** Develop electronic surveys for all events to obtain feedback on content, format and logistics.

**Goal 2:** Launch the Legends & Leaders program as a consolidated, annual event beginning in October of 2017.
- **Action:** Develop a speaker line-up that utilizes the opportunities the Irvine area provides with local executives. Finalize speakers by July 1, 2017.
- **Action:** Collaborate with start-up and entrepreneurial member partners to identify 3-4 showcases for the “Leaders” portion of the event.
- **Action:** Identify an educational institution as a partner, leveraging marketing opportunities and general promotion.
- **Action:** Generate a net revenue of $9,000 inclusive of individual registrations and sponsorships.

**Goal 3:** Retool Celebrate Irvine into a technology-driven event, showcasing the industry leadership held in Irvine.
- **Action:** Identify a taskforce to develop content and potential speakers.
- **Action:** Establish a budget resulting in a net of $24,000

**Goal 4:** Develop a platform for local CEO’s to meet and discuss high-level issues, as well as hear from local business economists.
- **Action:** Identify format of event, location and leadership by August 30, 2018.
- **Action:** Compile list of invitees based on determining participation qualifications such as size of business and industry specifics. Invitations to go out by September 30, 2018.
- **Action:** Establish a guest speaker on economics or business as a component of content.