

# 2012

## PROGRAM OF WORK

### & 2011 Annual Report



OUTRAGEOUS  
**ASPIRATIONS**





### **Our Vision**

Charlotte, along with the Charlotte region, is the best place to run a business and to live.

### **Our Mission**

The Charlotte Chamber creates competitive advantage by growing the economy, advocating pro-business public policies, and delivering innovative programs and services.



Photo by Richard Thigpen

### **Guiding Principles**

- Serve as the voice for the business community
- Grow economic diversity and sustainability through direct recruitment, retention and re-development
- Create fertile ground and communicate a business-friendly environment that attracts and retains new and emerging businesses
- Provide educational, networking and business growth opportunities for all members
- Collaborate openly and closely with chapter and board leadership, business, community partners and government leaders

### **Core Beliefs**

#### **We will ...**

- Be aggressive, responsive, proactive and collaborative in fulfilling mission-based member and community needs.
- Put our members first, understanding that they are the reason and means for our existence.
- Be inclusive and aggressively pursue diverse input and representation.
- Foster a dynamic and creative environment where all ideas, regardless of from whom they come, shall be encouraged and valued.
- Conduct and present ourselves in a professional, business-like manner and be committed to the highest quality in all that we do.
- Be financially sound and strong stewards of our members' investments.
- Act in an ethical and respectful manner in all aspects of our operations and conduct.
- Be innovative, strategic and see value through change.

With its mission in mind, the Chamber develops a **Program of Work** each year. The Program of Work is essentially a list of specific, strategic goals to accomplish over the coming year. It is developed using input from members through an annual survey, the annual Board of Advisors Retreat and the **Executive Committee**.



## 2012 Executive Committee



**Frank E. Emory Jr.**  
Chair  
Hunton & Williams



**Patricia Rodgers**  
Past Chair  
Rodgers Builders, Inc.



**Brett C. Carter**  
1st Vice Chair  
Chair of the Charlotte  
Regional Partnership  
Duke Energy Carolinas



**Mike Tarwater**  
2nd Vice Chair  
Carolinas HealthCare  
System



**Mike McGuire**  
Chair, Advantage  
Carolina  
Grant Thornton LLP



**Jennifer Appleby**  
Campaign Co-Chair  
Wray Ward



**Ned Curran**  
Campaign Co-Chair  
The Bissell Family of  
Companies



**Michael Barnes**  
Chamber Chapters Chair  
Carolina Connections Inc.



**Ernie Reigel**  
Charlotte Center City  
Partners Chair  
Moore & Van Allen  
PLLC



**Kendall Alley**  
Economic Development Chair  
Wells Fargo Company



**Anthony Fox**  
Education Chair  
Adams & Bernstein LLP



**Greg Kilpatrick**  
General Counsel  
McGuire Woods



**Melissa McGuire**  
Member Engagement  
Co-Chair  
Sherpa



**Lucia Zapata Griffith**  
Member Engagement  
Co-Chair  
METRO Landmarks  
Construction



**Pamela Davies**  
Operations/  
Communications Chair  
Queens University of  
Charlotte



**Louis Bledsoe**  
Public Policy Co-Chair  
Robinson, Bradshaw &  
Hinson P.A.



**Stoney Sellars**  
Public Policy Co-Chair  
Technology Project  
Management, Inc.



**Sonya Dukes**  
Strategic Partnerships  
Chair  
Wells Fargo Company



**John Switzer**  
Treasurer  
KPMG LLP



**Susan DeVore**  
At Large  
Premier



**Andrea Smith**  
At Large  
Bank of America



**Charlie Williams**  
At Large  
Blue Ridge Holdings Inc.



**Bob Morgan**  
President  
Charlotte Chamber of  
Commerce

# Growing the Economy

## 2012 Program of Work

- Recruit 4,850 new jobs and \$395 million in new investment through new companies and expansions.
- Conduct 250 BusinessFirst Charlotte interviews focusing on key employers, target industries and Chamber Chapters.
- Conduct reverse investment missions to Asia and Europe.
- Proactively target the health care, life sciences and energy industries leveraging strengths of existing businesses, hosting at least two events for targeted companies.
- Engage the top 50 to 100 chamber investors in an economic development field trip in conjunction with the fall planning retreat.

## 2011 Successes

- Recruited 4,662 new jobs and more than \$411 million in new capital investment.
- Contacted 254 firms through the BusinessFirst Charlotte retention and expansion program.
- Conducted proactive outreach in target sectors and international geographic targets including:
  - Hosted 58 supplier/vendors of Premier, Inc. in April and October;
  - Conducted two recruitment missions to Europe in April and October as well as China in November; and
  - Developed new marketing materials for the health care and energy sectors.



The relocation of Chiquita's headquarters will bring 400 jobs to Charlotte.



# Advocating Pro-business Public Policies

## 2012 Program of Work

- Develop a strategy for navigating the current political landscape and encouraging trust and consensus.
- Plan and implement summits on transportation, health care, energy and workplace policies to help focus ideas and refine the chamber's efforts around those issues.
- Advocate for broader use of alternative funding methods for transit and roads infrastructure.
- Develop additional programming that encourages interaction between chamber members and elected officials.
- Advocate at all levels of government on issues that affect the cost of doing business, the ease of doing business and the quality of life in Charlotte.
- Monitor and advocate for a new public school superintendent who will continue to advance the policies and reforms that will grow student achievement.
- Advocate for resources and initiatives that prepare our workforce, including funding, policies and reforms for our higher education institutions and Charlotte Mecklenburg Schools.
- Work with regional higher education institutions and economic developers to create more ongoing dialogue about workforce needs and capacity.
- Monitor and advocate for policies and funding at all levels of government to aid in creating an informatics hub in Charlotte.

## 2011 Successes

- Advocated successfully for workers comp reform, tort reform, regulatory reform, medical malpractice reform, and funding for our transportation infrastructure and education systems.
- Created events aimed at educating members on policies affecting transportation, health care, energy and workforce in our community.
- Worked with Charlotte Mecklenburg Schools to create and implement messaging strategies around budgetary and talent effectiveness issues.



Securing new leadership, reforms and funding for Charlotte-Mecklenburg schools is vital in developing our workforce.

# Delivering Innovative Programs and Services

## 2012 Program of Work

- Provide programming focused on small businesses and entrepreneurs through the monthly Survive & Thrive! series and the Access to Capital event.
- Capture, report and promote results emerging from the Charlotte Minority Economic Development Initiative (CMEDI) and raise \$500,000 to fund the second year.
- Develop and implement strategies to strengthen minority and women participation and value derived from Charlotte Chamber memberships.
- Monitor member engagement and satisfaction at chamber events, maintaining connectivity and relevance ratings above 80 percent while increasing member participation by 15 percent over last year.
- Engage and convene entrepreneurial and creative communities to develop and launch efforts to leverage Charlotte assets to drive economic diversity, growth and expansion.
- Provide exclusive programming and value for our investor-level members through successful quarterly Board of Advisors meetings and annual Economic Outlook Conference, Inter City Visit and Planning Retreat.
- Support efforts of the Democratic National Convention host committee.
- Establish a recognition and reward program for our social media ambassadors.
- Work with top investors to develop custom strategies to maximize their returns.
- Introduce our audiences to new technologies and ideas through “wow” moments at 12 chamber events.

## 2011 Successes

- Conducted a successful Inter City Visit to Seattle.
- Had record-breaking attendance at the Fall Planning Retreat.
- Developed and launched the Charlotte Minority Economic Development Initiative (CMEDI) in partnership with the Carolinas Minority Supplier Development Council. CMEDI is focused on accelerating the economic impact of minority owned businesses, while simultaneously leveraging the best practices of corporate partners’ supplier diversity programs.
- Hosted Charlotte Creates and Cultivating Charlotte’s Entrepreneurial Ecosystem summits, which set the stage to focus on better leveraging Charlotte’s creative, innovative and entrepreneurial talent to impact Charlotte’s job creation and overall economy.
- Continued to support small business members through the Charlotte Chamber’s seven chapters, offering programming that provides attendees with relevant information and connections that add value to their respective businesses.



The Cultivating Charlotte’s Entrepreneurial Ecosystem Summit launched in 2011 is driving new ideas and partnerships in 2012.

# Running the Chamber Effectively

## 2012 Program of Work

- Conduct a successful Total Revenue Campaign and continue to improve processes that aid volunteers and staff.
- Ensure strong fiscal and operational management.
- Continue efforts of the Membership Taskforce to recruit and retain members.
- Launch new web design, integration and mobile site.
- Communicate our accomplishments and issues through ongoing public relations efforts and our Annual Meeting.

## 2011 Successes

- Conducted informational quarterly meetings for GreenWorks, the chamber's sustainability council.
- Surveyed 1,000 members and non-members to ensure we are meeting the business community's needs and to help set priorities for coming years.
- Surpassed the 2011 Total Revenue Campaign goal.
- Operated above budgeted financial levels with a strong balance sheet.



N.C. Governor Bev Perdue was in attendance at our 2011 Annual Meeting to help celebrate job recruitment.

## The Charlotte Chamber recognizes the commitment of our investor level members to the Chamber and the Charlotte community.

### TRUSTEES

Balfour Beatty Construction  
Bank of America  
Belk, Inc.  
Carolinas Medical Center  
Duke Energy Corporation  
Presbyterian Healthcare  
Time Warner Cable  
Wells Fargo

### DIRECTORS

ADECCO  
Allen Tate Company  
AT&T  
BB&T  
Bissell  
Blue Cross & Blue Shield  
of North Carolina  
CapTech  
Carolina Business Interiors, Inc. (CBI)  
CertusBank, NA  
Chiquita Brands International, Inc.  
Charlotte Regional Visitors Authority  
Deloitte  
Fifth Third Bank

Findley Davies, Inc.  
Goodrich Corporation  
Grant Thornton LLP  
Hendrick Automotive Group  
IBM Corporation  
Jones Lang LaSalle  
Ogletree, Deakins, Nash, Smoak  
& Stewart, P.C.  
Parsons  
Piedmont Natural Gas Company  
Premier  
PricewaterhouseCoopers LLP  
Ricoh  
Robinson, Bradshaw & Hinson P.A.  
Signature Consultants, LLC  
SPX Corporation  
Strategic Staffing Solutions, Inc.  
SunTrust Bank  
The Center for Intentional Leadership  
The Charlotte Observer  
The Shaw Group, Inc.  
UNC Charlotte  
UnitedHealthCare of North Carolina  
University Volvo  
US Airways

### PRESIDENT'S CIRCLE

AREVA  
BECO South, Inc.  
Carowinds  
Charlotte Pipe & Foundry Co.  
Electrolux  
Ernst & Young, LLP  
First Citizens Bank  
FMC Corporation - Lithium Division  
GE Money  
Husqvarna Professional Products Inc.  
Ingersoll Rand Company  
KPMG LLP  
Odell Associates Inc.  
RBC Bank  
Ruddick/Harris Teeter  
Snyder's-Lance, Inc.  
Sprint Nextel Corporation  
The Cato Corporation  
The North Highland Company  
The Vanguard Group  
TIAA-CREF  
WSOC-TV/WAXN-TV



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