



SAN LUIS OBISPO  
CHAMBER OF COMMERCE  
STRATEGIC PLAN  
**2012-2017**

## INTRODUCTION

The creation of the San Luis Obispo Chamber of Commerce's first-ever Strategic Plan in 2011 was the result of careful planning by the Chamber's Board of Directors. 2011 was a year of change and transition for the Chamber. With the retirement of Dave Garth, who had been the CEO of the Chamber for more than 38 years, the Chamber Board felt it important to provide the new CEO with every possible tool to be successful—one of which was the creation of a detailed plan for the future.

The objectives set forth in this five-year strategic plan will help the Chamber in its mission to promote the economic and community well-being of San Luis Obispo. In a season of change and economic uncertainty, having this plan in place will help the new CEO align the Chamber's structure and staffing around clearly defined goals.

The plan is structured to provide background and context in five key areas: economic development, legislative affairs, membership, operations, and communications. Within these key focus areas, the implementation plan includes prioritization of initiatives, specific quarterly action items and key measurements that will be used to determine the success of the Chamber's efforts in carrying out the plan.

The initiative to create this document was led by 2011 board president, Michael Gunther and the executive committee of the San Luis Obispo Chamber of Commerce. Brainstorming began at the 2010 Chamber board retreat, with extensive discussion around long-term planning, initiatives, and key measurements. A complete draft was provided to newly-hired Chamber CEO, Ermina Karim, to allow her to review, edit, and align the Chamber's structure with the defined goals and incorporate staff input. The Strategic Plan was approved in late 2011 and implementation began in January 2012.

Since adoption, the plan has served as a critical planning tool to drive improvements and focus efforts for the Chamber staff and volunteers. Key initiatives in the first two years of implementation have included identifying and securing a new Chamber home to better serve member needs; furthering

important Chamber legislative priorities; and identifying numerous operational improvements to enhance effectiveness. At the start of each year, the Board approves an annual implementation plan; progress is evaluated each quarter by the Executive Committee and semi-annually by the Board.

Entering the third year of the Strategic Plan, the Board of Directors has updated the document to reflect priorities and strategic vision. What is clear is that in its first few years of implementation, this Strategic Plan has provided a solid road map to allow the Chamber to continue to evolve and be a leader in both the industry as well as the community.

Tim Williams, 2014 Chairman of the Board

## ABOUT THE CHAMBER

The San Luis Obispo Chamber of Commerce is a member-driven, professionally staffed 501(c) 6 not-for-profit organization dedicated to supporting and promoting the regional business community. The Chamber has been focused on business success since 1905. It the largest business group on the Central Coast and has one of largest membership bases in the state.

*Our mission:*

*As the voice of business, to promote the economic and community well-being of San Luis Obispo.*

The Chamber core programs of work focus on:

- 1) Creating a strong local economy
- 2) Representing the interests of business with government
- 3) Providing networking opportunities
- 4) Promoting the community
- 5) Taking political action

The Chamber offers many opportunities, benefits, services and resources designed to help businesses thrive. Membership advantages include business promotion, targeted advertising and publicity, legislative representation, business advocacy, educational opportunities, and connections to resources, information and influence.

## EXECUTIVE SUMMARY

This five-year strategic plan addresses our areas of focus to continue to fulfill our mission. The five key priorities identified in the document will inform and guide the San Luis Obispo Chamber of Commerce's work in the coming years.

This plan is an evolving document that allows for growth and change as well.

**Priority 1:** Strengthen the local economy by assisting companies to grow, start and relocate here.

**Priority 2:** Grow legislative influence in the region.

**Priority 3:** Sustainably grow membership base that is engaged and reflects the diversity of the business community.

**Priority 4:** Enhance Chamber operations to increase effectiveness and long-term success.

**Priority 5:** Develop cohesive and effective branding, marketing and communications effort with membership and community.

## ECONOMIC DEVELOPMENT

The primary economic development efforts of the Chamber have been through advocacy, ensuring that the region supports business health and accommodates business growth. This ongoing commitment has significantly shaped the local economic development programs and efforts. While this will remain a core focus of the work program, the Chamber will increase the tools, resources and connectivity it provides to assist local businesses and the entrepreneurial ecosystem. The efforts will be in collaboration with other local stakeholders that are working to grow the regional economy.

### PRIORITY 1

Strengthen local economy by assisting companies to grow, start and relocate in the region.

**Strongly and proactively advocate the Economic Vision 6-point strategies.**

Shape policies, planning efforts and issues to assist local business growth and success. Oppose policies that will be harmful to long-term local economic vitality. Help drive the City's Economic Development Strategic Plan in order to further the Chamber's Economic Vision.

**Nurture effective and collaborative relationships.** Enhance collaboration and cooperation between organizations to achieve a healthy and robust climate for businesses of all sizes. Work with other organizations and chambers to help further our mission and vision.

**Be the go-to resource for local business information.** Develop new business growth programs to educate and inspire members. Enhance and update Chamber websites with new online tools and beneficial data.

**Develop and support business networking.** Identify varied and specialized opportunities to engage executives from businesses and industries the

Chamber has difficulty reaching, as well as from companies that are active Chamber members.

**Support needed infrastructure to help high-growth companies expand locally.** Promote the need for adequate infrastructure and resources. Identify and advocate for new financing strategies to meet community needs and priorities and more equitable distribution of the cost of these improvements. Encourage private-public partnerships to achieve economic development goals.

**Drive initiatives to enhance entrepreneurial environment.** Grow local entrepreneurial economies through support of regional clusters of opportunity. Identify opportunities to support existing and new efforts with Cuesta College and Cal Poly including proactive engagement in the success of the SLO Hothouse. Leverage regional assets to connect with encore entrepreneurs. Market our success stories to focus our community branding as a business growth region.

## LEGISLATIVE

The Chamber has a long track record of successful local legislative activity, which has historically centered on the city of San Luis Obispo. The goal has been to influence issues that are most relevant to Chamber members and where the organization could have the greatest impact. Going forward, the Chamber will widen its view to more closely engage on county issues and strategically address state and federal legislation.

### PRIORITY 2

Grow legislative influence in the region.

**Be a watchdog for issues affecting our membership.** Identify city, county, state and federal issues that will impact member businesses and determine effective advocacy efforts and communication methods. Strategically grow focus on county and state issues.

**Educate membership.** Empower members to act on issues that impact business. Provide tools to connect members to decision-makers.

**Foster relationships with decision makers.** Numerous leadership transitions in both public and private organizations and government entities throughout the county drive a need for greater relationship building to ensure productive dialogue. Continue building upon these relationships and collaborating with other organizations and chambers on mutually relevant issues to be more effective.

**Capitalize on legislative successes.** Connect Chamber role to legislative outcomes. Determine more effective communication strategy on past and current legislative activities.

**Engage in political action.** Be proactive to influence change that will promote a prosperous, balanced community. Encourage greater participation from the business community in political leadership.



## MEMBERSHIP

As a member-driven organization, the Chamber's strength is predicated on how effectively it is able to attract and remain relevant to the greater business community. In order to achieve manageable, healthy growth, the Chamber will focus its efforts on creating greater value for its membership.

### PRIORITY 3

Sustainably grow membership base that is engaged and reflects the diversity of the business community and maximize the member experience.

**Support and retain existing membership base.** Enhance the experience of businesses that are investing in the Chamber. Develop innovative membership outreach tools. Explore techniques for onboarding members. Seek new avenues to connect with longer-term members.

**Strategically expand membership – size, industry and geographic location.** Identify segments of the regional business community that would enrich the existing membership base and further the Chamber's mission.

**Utilize member database to better serve membership and deliver on strategy.** Capture more information to better manage and serve membership. Improve the member experience.

**Attract new generation of business leaders.** Enhance the value proposition to future-oriented companies throughout the region.

## OPERATIONS

Maintaining a well-managed operation of the Chamber involves engaging its Board of Directors, professional staff and members. Day-to-day operations are managed by the professional staff, which is directed by the President/CEO.

### PRIORITY 4

Enhance Chamber operations to increase effectiveness and long-term success.

**Align internal structure and external programs to deliver on mission and economic vision.** Ensure that the Chamber's work is structured to maximize member-driven needs and expectations while maintaining brand quality.

**Diversify revenue base.** Maintain a strong financial position. Identify and seek new opportunities to broaden the investment support of the Chamber in order to fund new and existing programs and improve member services and resources.

**Create office environment and culture that reflects values, vision and strategy.** Continue to develop a strong, stable professional staff. Provide a business environment that enhances the Chamber's image and member experience and meets future staffing needs and functionality. Consistently invest in appropriate technology.

**Engage new generation of business leaders.** Cultivate meaningful relationships with emerging business and community leadership to strengthen future participation in leadership of the organization.

## COMMUNICATIONS

The Chamber's communication efforts underpin all Chamber programs. assist business connection and growth. Member engagement and advocacy success is tied to the Chamber's abilities to effectively tell its story. In recent years, the channels to reach members have expanded significantly. This changing landscape presents both challenges and opportunities for the Chamber to navigate in order to be as effective as possible.

### PRIORITY 5

Develop cohesive and effective communications, branding, and marketing effort with membership and community.

**Facilitate member-to-member communications.** Provide expanded opportunities for members to do business with other businesses and consumers.

**Be seen as the information hub.** Utilize network of members and community relationships to enhance reputation as the go-to place for local information and relationship connectivity. Explore new and existing Chamber tools and resources for business community information.

**Identify appropriate methods to disseminate information and communicate with members and the community.** Target member communications for greater effectiveness. Explore more traditional methods to connect with members. Maximize use of technology to engage members.

**Evolve and elevate the strength of the Chamber brand to increase value and relevance.** Create authentic, consistent effort to deepen Chamber connection to its members and the community. Deliver high-quality communications across all platforms that further our mission and promise to members. Establish more proactive public relations effort for Chamber accomplishments on behalf of its members.

## KEY MEASUREMENTS

- Member satisfaction of Chamber performance through annual membership survey
- Revenue from Chamber members? Size to revenue? Total revenue including attending events, ad buys, sponsorships, etc.
- Number of total Chamber members and what the percentage is in the City of San Luis Obispo compared to the whole? What percentage in the County?
- Number of business licenses in the City? In the County? Number of jobs? Average salary?
- Legislative success track record
- Community satisfaction survey

### **The remainder of this document covers:**

- A. Initial Strategic Action Plans by function and by time period
- B. 2011 baseline on Top 5 key measurements
- C. Financial Overview
- D. Supporting Documents