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# STRATEGIC PLAN

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2017

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2022

Angel Robertson, Chairman of the Board, 2017

Chris Shaver, Chair Elect

Matthew Midura, Chair Emeritus

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## Summary of Overall Strategic Goals and Tactics Grouped by their Relationship to the Chamber's Core Competencies

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### 1. Supporting a Sustainable Future

- Focus on membership retention and a reasonable pace of membership growth through meaningful programs, events, seminars, networking opportunities and partnerships.
- Increase value-added products, services and partnerships for our members.
- Increase the value of overnight stays in our local hotels through operation of the Conejo Valley Tourism Improvement District (CVTID).
- Increase the number of visitors to the Greater Conejo Valley.
- Ensure the financial stability of the Chamber as a result of conservative budgeting and aggressive capture of new revenue streams for all programs.
- Enhance our Marketing & Communications program to effectively promote benefits of membership to investors.
- Create additional opportunities for non-member participation.
- Facilitate efforts to ensure a clean and healthy community in which to work and play.
- Protect and conserve natural resources recognizing that the stewardship of the environment is essential to the economy.
- Utilize cutting edge technology for enhancement of Chamber programs and services.

### 2. Creating a Strong Local Economy

- Create avenues through which members can expand their businesses and careers through Business to Business, Business to Consumer and People to People connections.
- Actively engage the business community in programs and events that contribute to the development of a positive business climate.
- Provide an environment where educators and business work together to ensure a qualified workforce.
- Develop future community leaders.
- Serve as a leader and extension of local economic development entities.
- Manage data collection, lead fulfillment and targeted marketing activities to draw desirable businesses to relocate in the Greater Conejo Valley.

### 3. Promoting Community & Providing Networking Opportunities

- Strengthen the Chamber's profile as an organization committed to the successful growth and development of its members.
- Effectively present a positive image to the community regarding the programs, policies and issues supported by the leadership of the Chamber.
- Provide means of communication through which the Greater Conejo Valley can celebrate local strengths and successes.
- Make a vital impact through community service-related projects including enhanced utilization of the Greater Conejo Valley Community Foundation.

## 4. Representing the Interests of Business with Government & Taking Political Action.

- Participate in public/private partnerships.
- Create a pro-business environment through informative government initiatives.
- Be a leader in building coalitions throughout the region.
- Serve as a conduit to provide timely information on legislative and governmental issues impacting business.

### The Mission

The Greater Conejo Valley Chamber of Commerce enhances the profitability of businesses in the cities of Thousand Oaks, Westlake Village and Agoura Hills through leadership, political action and dynamic programs to promote economic vitality for our members and community.

### The Vision

The Greater Conejo Valley Chamber of Commerce strives to be recognized as the premier business advocacy organization encompassing the Conejo Valley, surrounding communities and all spheres of influence in the region.

### The Values

The Greater Conejo Valley Chamber of Commerce values are to:

- **Serve** the businesses of the Conejo Valley
- Promote economic **vitality**
- Create **value** for our members by building relationships, partnerships and networks
- Be **accountable** in offering innovative and effective programs for members and the community at large.

### Core Competencies

The Chamber creates opportunities for business success by:

- Creating a strong local economy/Healthy growth
- Promoting community/Integrity
- Providing networking opportunities/Commitment
- Representing the interests of business with government/Unity
- Taking political action/Advocacy
- Supporting a sustainable future/Innovation

These core competencies are ranked in order of importance as a result of surveys with our members and the members of the statewide California Chamber of Commerce.

## About the Greater Conejo Valley Chamber of Commerce: A High-Level View

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The Greater Conejo Valley Chamber of Commerce is a member-driven, professionally staffed 501©6 not-for-profit organization dedicated to supporting the regional business community of the Conejo Valley including the cities of Thousand Oaks, which is inclusive of the community of Newbury Park, Westlake Village and Agoura Hills and unincorporated Oak Park. The Chamber has been creating opportunities for business success in the greater Conejo Valley region since 1939 and celebrated its 75<sup>th</sup> anniversary in 2014. It is one of the largest chambers of commerce in the western United States and is one of only six 5-star chambers of commerce in the state of California as rated by the accreditation arm of the United States Chamber of Commerce. The highest ranking available, the 5-Stars, places the Chamber in the top 1% of the more than 7,000 chambers of commerce, nationwide. The Chamber was re-accredited for the 2<sup>nd</sup> time with a 5-Star rating in November, 2016 which extends its accreditation through November, 2021. The Chamber also holds the unique distinction of retaining contracts with and representing three cities as their official chamber, one of very few in the country to do so.

The Chamber offers many opportunities, benefits, services and resources created and executed by a talented and experienced professional staff to help business prosper. Among the menu of membership advantages are Chairman's Club participation, business promotion, targeted advertising and publicity, education, advocacy, legislative representation and access to resources, information and influence. The Chamber shines a spotlight on business and tells its story in real time.

The Chamber provides monthly Networking @ Night mixers, breakfasts and Emerging Leaders events for young professionals under 40 years of age. It also provides committees, forums, a Mixpo and sophisticated special events including Taste of Conejo and the Gala. The Chamber provides thousands of referrals, annually, and welcomes visitors to call, click or come on in to our 5,000 square foot offices, our website with over 10,000 visits per month, on-line directory, re-designed e-newsletter, the Weekly View and the quarterly glossy business magazine, Conejo View, distributed at 70+ locations throughout the Conejo Valley. The Chamber underwent a comprehensive re-brand in 2013 providing a modern, sophisticated, welcoming vibe reflective of the Chamber's image, reputation and goals and will be rebuilding its website in 2017.

The Chamber is the executing organization for the Greater Conejo Valley Community Foundation, a 501©3 non-profit formed in 2003 and the Conejo Valley Tourism Improvement District, formed for the benefit of our local hotel partners in 2013. Each entity has its own Board of Directors with ultimate oversight by the Board of Directors of the Chamber.

### Competition

The Chamber serves the area of southeastern Ventura County and a portion of northwestern Los Angeles County. No other chambers of commerce, conference and visitors bureaus or similar organizations lie within this area. The Chamber has an excellent collegial relationship with surrounding chambers of commerce and enjoys a reputation as a collaborative, go-to organization for best practices and partnerships. The Chamber is an active member of the Chambers of Commerce Alliance of Ventura & Santa Barbara Counties. Businesses with a regional reach are often members of multiple chambers.

The Greater Conejo Valley Chamber is the largest in the region in terms of both membership (approximately 1,000) and staff (10). From a business member's viewpoint, the Chamber sometimes competes with independent and for-profit networking organizations including Provisors and ACG. The Chamber has four networking groups, currently, plus Emerging Leaders for professionals under 40, and Conejo Senior Resource Network (CSRN), a group for businesses who's target market is the senior community.

## Our Audience

- Current Chamber members
- Non-member businesses in the market area
- Government / Local / State / Federal
- Community at Large (residential and commuter employees)
- Visitors (tourism)

## Current Members

The Chamber's current membership fluctuates between approximately 900 – 1,000 members. The breakdown of membership by the number of employees is:

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|-----------|-----|
| ➤ 0-5     | 62% |
| ➤ 6-10    | 17% |
| ➤ 11-50   | 16% |
| ➤ 51-100  | 2%  |
| ➤ 101-500 | 2%  |
| ➤ 500 +   | .5% |

There are an estimated 11,000 businesses in the Conejo Valley; approximately 10% are members. The top business sectors represented in Chamber membership are:

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|--|-----|
| ➤ Professional services (CPA's, attorneys) | 14% |
| ➤ Hospitality (hotels, restaurants)        | 7%  |
| ➤ Medical services                         | 6%  |

The community at large is composed of the following populations:

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|--------------------|----------|
| ➤ Thousand Oaks    | 126, 091 |
| ➤ Westlake Village | 8,469    |
| ➤ Agoura Hills     | 22, 283  |

## Research

The Greater Conejo Valley Chamber of Commerce conducts periodic membership surveys in cooperation with the Western Association of Chamber Executives (W.A.C.E.) via email. Member surveys are also conducted throughout the year on specific topics on an as-need basis. Examples of recent surveys and focus groups are the 2016 comprehensive Western Association of Chamber Executives (WACE) survey conducted by the California Chamber of Commerce and 2016 Chamber travel surveys.

## Our Goals

The Greater Conejo Valley Chamber of Commerce will pursue a reasonable pace of growth and a conservative fiscal strategy fueled by increasing new membership and retention of existing members. The Chamber goals also include the increase of non-dues revenues through all avenues including Chairman's Club, sponsorships, advertising, e - Certify, room rentals, city and other partnership contracts for services and an organic awareness of opportunities that are a good fit for the Chamber's Mission.

The Chamber's critical goals also include a laser- focus on the advancement of the region's economy, with a specific focus on the successful ROI for the participating hotels in the CVTID in terms of overnight stays and use of other facilities including their restaurants, business and celebration facilities.

The Chamber will continue to enhance our member's success by evaluating and providing targeted products, services, events and programs.

The Chamber also sets a goal of continuous organizational improvement to position the organization for long term success.

## Strategy

To achieve its goals, the Chamber will focus on the following Areas of Concentration:

- Membership
- Revenue
- Tourism
- Business enhancement (local economy, events, programs, etc.)
- Government/ Education
- Marketing/Events
- Technology

## Membership

- Develop tiered pricing program to provide potential members with a menu of options from which to choose and pay for the services they want. This program will phase in over at least one year, beginning with new members, and will ultimately replace the current dues structure based on number of employees.
- Increase number of new members to a measurable result of 25-30 new members per month using the Chamber's marketing tools (new website, branding, ConejoView, etc.) and with in-person visits, effective high-touch connections and sound sales techniques.
- To help retain new members beyond their first year, continue execution of Touch Call phone program, with the Operations Coordinator making approximately 12 calls per week.
- Continue Ambassador growth to help with membership retention.
- Educate potential and renewing members on the "value without involvement" strategy in response to those who say they "don't have time to participate." Educate them on the benefits received without going to breakfasts, mixers, etc. (The 24/7 or "While You Were Working, Your Chamber is Working for You") proof of value.

- Continue connecting members with each other through involvement with the Ambassador program and networking groups, increasing their visibility in the community.
- Provide them with the information on additional marketing opportunities for them on the Chamber website, in the Weekly View and ConejoView and by taking advantage of sponsorship and Chairman's Club opportunities.
- Promote leadership opportunities to consider such as Leadership Conejo, chairing of committees and running for the Board of Directors.

## Revenue

- Ensure the financial stability of the Chamber as a result of conservative budgeting and analytic evaluation for all programs. Improve overall fiscal results through a variety of methods including:
- Working with the Budget Task Force/Finance Committee to continue to achieve a profitable budget, a comprehensive and safe investment plan for the Chamber's reserves, accurate forecasting and budgeting and execution of a long term financial plan for the Chamber.
- Increase the number and value of Chairman's Club memberships (currently valued at approximately \$200,000) and overall sponsorship revenue.
- Increase the partnership in the CVTID by adding the remaining three hotels in Westlake Village and four hotels in Malibu. As with many items, this one fits under more than one category and will also play a key role in the Chamber's business enhancement goals.
- Hit new member and membership retention goals.
- Set goals for enhanced revenue through website and Weekly View ad sales.
- Implement tiered pricing.
- Continue executing sponsorship packages for non-traditional Chamber offerings such as Leadership Conejo, committees and seminars.
- Continue to control costs through thorough negotiations with vendors, leveraging of win-win partnerships and freeze on overtime by hourly staff.

## Tourism

The strategic priority for the Conejo Valley Tourism Improvement District (it began funding on August 1, 2013) continues to be to develop and execution a sophisticated marketing strategy that promotes the participating hotels and their facilities to the sports, family, business, international, arts, celebratory and leisure sectors of the market who are now choosing Los Angeles, Santa Barbara and other competitive markets for many of these needs.

- This will be achieved by a continued partnership with our award-winning destination marketing agency, Augustine, to continue to increase proven results in ROI, REVPAR (revenue per available room) and transient occupancy tax (TOT).
- Comprehensive brand analysis and design.
- Participation with tourism promotion agencies such as Visit California, Western Association of Convention & Visitors Bureaus and Brand USA.
- Re-design of CVTID's award-winning website to continue successful attraction of our target markets to hold their sporting events, seminars, weddings and get-a-way's at the participating hotels and to return, often.



- Advertise in regional and national publications (Sunset, Successful Meetings, Pinnacle), on line and off line to provide information for meeting and event planners and tour operators to highlight the varied pricing, central location and many desirable attractions accessible from our hotels.
- Assist with a variety of events which showcase our hotels and community and contribute to the profit of our hotels and business community, including the Amgen Tour of California.
- Advance partnerships with Pepperdine, California Lutheran University, National Parks Service, Conejo Recreation & Park District, the Ronald Reagan Presidential Library and other interested parties to determine resources and strategy.
- Continue to distribute media kit and send press releases to local, regional and national publications.
- Execute comprehensive social media campaign.
- Manage the marketing agency to ensure full, timely and high-level execution of deliverables including print, branding, budgeting, on line and offline marketing, social media, leveraging of partnerships, etc.
- Ensure high-level governance, administration and accounting of CVTID.

## Business Enhancement (Local Economy, Events & Programs)

Build a strong local economy and promote our community through a variety of tactics including:

- Continue deep current menu of program, product, service and event offerings (see organizational chart). Continue to rigorously evaluate the effectiveness of all offerings at least annually and assess value to membership and Chamber.
- Continue adding relevant speakers to enhance seminars, committees and forums.
- Consider potential partnership with new business incubator group to participate with new-economy businesses including web-based and bio technology start-ups.
- Continue to explore and utilize new media including Instagram and YouTube.
- Focus on increasing participation and awareness in the Chamber's affinity programs including Office Depot.
- Work with the Foundation Board to promote more diverse participation in Leadership Conejo.

## Government/Education

- Represent business interests to government at the local, state and federal levels.
- Establish business education offerings to help members improve their businesses.
- Conduct government relations meetings to discuss and review legislation that impacts business; communicate the Chamber's positions.
- Continue to educate members on the benefits of a PAC.
- Maintain excellent communications with elected officials and their staff.
- Utilize conference calls and legislative visits to stay abreast of imminent issues.
- Coordinate and host candidate forums.
- Participate with other chambers in regional legislative events.
- Poll members on legislation pertinent to business
- Continue to position the Chamber as a consensus builder and mobilizer of resources for the purpose of strengthening businesses influence and growth.
- Educate membership on the governmental process and how they can participate.

- Identify common goals between city and county government and the business community to ensure a proactive approach at all levels, locally.
- Assist employers who wish to recruit and retain the best quality employees in a changing labor market; partner with local universities and their career centers.
- Expand internship program with CLU and the City of Thousand Oaks.
- Expand Business Recognition Program with the City of Westlake Village
- Encourage more participation in the Education & Work Force Committee; involve that committee in achieving Foundation goals (increased scholarships, grants and awareness).
- Serve as a resource and support system to our local school districts and private school partners, at all levels.
- Expand Teacher of the Month program to include the Oak Park School District.
- Continue to expand partnerships with California Lutheran University, Cal State Channel Islands and Pepperdine.
- Create an online business library that increases the number and access of business-oriented forms and data for our members including applications for business licenses, white papers by area professionals, Best Practices on timely subjects, etc.
- Create a culture of lifelong learning.

## Marketing and Events

- Continue to innovate to promote the Chamber, businesses and the community at large.
- Expand current partnerships with local media including *Ventura County Star*, *The Acorn*, *San Fernando Valley Business Journal*, *Society Social Calendar*, *805 Living* and others.
- Continue high quality of *Conejo View*, *Weekly View* and the Chamber's website.
- Continue high quality of Chamber events including monthly Jumpstart Breakfasts, Networking at Night mixers, and special events including Gala, Taste of Conejo, 40 Under Forty, Mixpo, Economic Forecast, etc.
- Increase awareness, participation and sponsorship of these events through press releases, social media and requesting that event partners contribute to the creation of awareness for the events by leveraging their website, social media and sending out press releases, as well.
- Create a year of celebrations of different kinds surrounding the Chamber's 80<sup>th</sup> birthday in 2019.

## Technology

The Chamber will prioritize keeping pace with current technology, making upgrades and changes in a timely manner based on the need, longevity of the technology and return on investment.

- The Chamber will continue to implement its current technology plan including our partnership with ABI for maintenance and regular upgrades of all software and hardware.
- Outdated equipment will be donated or recycled.
- The Chamber will keep abreast of technological innovations and work towards implementing them as needed.

## Short Term and Long Term Goals

In creating this draft Strategic Plan, we have intentionally brought forward goals that build on areas that are currently being executed well but in which we believe there is continuing opportunity for growth. We have also intentionally not included or emphasized parts of the Chamber's program of work that are boiler plate, operating optimally and/or not a "priority/goal" area, at this time.

Having achieved much of the previous strategic plans in a shorter time period than originally planned for, we chose to eliminate that which was no longer relevant or has been completed and focus instead on the goals included here because we believe they will yield the most mission-specific results.

Therefore, work on each of these goals is on-going and measured and evaluated regularly over the short and long terms by Chamber staff, the Executive Committee and the Board of Directors.

This strategic plan is a living document, prepared and executed by the Board of Directors and staff of the Greater Conejo Valley Chamber of Commerce.

