

1si Strategic Plan – 2020 and Beyond

Greetings!

On behalf of the board of directors, investors and staff of One Southern Indiana (1si), it is my pleasure to introduce to you our organization's **1si Strategic Plan—2020 and Beyond**. This document was developed to help guide and direct our activities, as well as the allocation of our resources, so that we can provide positive impact to the economy of our communities and the regional economy in which we operate.

1si was formed in 2006 as the chamber of commerce and economic development organization serving Clark and Floyd Counties. Since our last strategic planning effort in 2013, 1si has organized its work around six strategic focus areas to best achieve our mission and create the most impact in our communities. As work toward these strategies continued, two key strategic initiatives emerged – one as an opportunity and one in response to a threat – and we adapted our structure and focus to address them within the framework of our Strategic Plan: Regional Development and Talent Development.

In 2017, the 1si Board of Directors charged forward by asking our stakeholders to look ahead – to 2020 and beyond – to help chart the course for our adaptation to better meet the changing needs of the business community. Throughout the year, members, investors, elected officials, partners and other stakeholders were asked to share their input on the future initiatives of 1si. This document reflects the ideas, concerns and enthusiasm expressed in over 20 facilitated conversations.

We hope that as a supporter of 1si, you will find value in this **1si Strategic Plan—2020 and Beyond** as it sets the path on which we will travel together to improve the economic viability of Southern Indiana. We will continue to deliver annual work plans with action items that will be accomplished and our progress toward our strategic objectives will be tracked quarterly and reported annually.

By working together, we will achieve the mission and vision we have established for our communities.

Sincerely,



Wendy Dant Chesser
President and CEO

History of Organization



In 2005, leaders in both Clark and Floyd counties volunteered their time to discuss the need for a plan that would help ensure a viable future for Southern Indiana. Driven by a desire to implement change that would establish stronger economic growth, a better educated and better paid workforce, and a structure of advocacy within the State of Indiana, the boards of Southern Indiana 2020, the Southern Indiana Chamber of Commerce and the Southern Indiana Economic Development Council came together to form an organization that speaks with one vision and one voice.

The new organization, One Southern Indiana, Inc. (1si), was official on July 1, 2006 and has become a more aggressive resource to the business community and government leaders in building on the strengths and vision of all three predecessor organizations.

Proudly, 1si works with both large and small businesses. We offer services such as new business attraction, retention and expansion of existing business, networking opportunities, workshops and educational programs and events geared for the business professional.

1si is an advocate for the local business community. Through engagement at all levels of government, 1si is building a reputation as the primary advocacy resource for members, for the region and for key decision makers. We support public policy that facilitates high wage/high skill job creation, entrepreneurship, capital investment and existing business retention and expansion. We also support actions that contributes to a strong quality of life that attracts and retains jobs and investment.

To achieve our mission and vision, we collaborate with many partners representing private businesses, not-for-profit organizations, public entities and learning institutions. One primary partner is the OSI Foundation, Inc., which is an Indiana not-for-profit charitable organization established to operate exclusively for the benefit of, or to perform the functions of, or carry out the purposes of economic development. The OSI Foundation is the receiving entity for any grant funds and investments to support economic development activities. The OSI Foundation is a tax-exempt organization and operates under its own Board of Directors.



This **1si Strategic Plan—2020 and Beyond** provides for our organization the necessary components to set our organizational direction, what we will address, and guidelines on how we will operate.

Mission/Vision: The 1si Board of Directors revisited our Mission and Vision statements and updated both to reflect the desired outcomes of our work. Moving forward, 1si will work toward the following Mission and Vision.

Mission: To help businesses thrive in the Southern Indiana and metro area.

Vision: That our Southern Indiana region will be economically strong, and all businesses will flourish; providing viable jobs, prosperity, and quality of place.

Strategic Focus Areas: The **1si Strategic Plan – 2020 and Beyond** for One Southern Indiana consists of six Strategic Focus Areas in which our work will be concentrated, communicated and measured. Staff will develop annual work plans in this framework, which will include action items, contributing partners, target completion dates and metrics of success for each work initiative prioritized for each year.

These Strategic Focus Areas include:

Growth through Economic Development

Economic development is the priority for many 1si investors. The goal of this strategic focus area is to enhance the area's vibrancy by facilitating economic transactions that generate wealth and add to community prosperity. Economic development initiatives build healthy economies and opportunities throughout Southern Indiana that support a stronger community at large, while increasing the overall standard of living of residents throughout the region.

1si will continue to facilitate agreement on annual work strategies and key initiatives, and through collaborative execution, establish metrics and measure our results in the areas of full employment, an expanded tax base and economic self-sufficiency for individuals and communities.

WorkHub: Cracking the Workforce/Talent Code

Since the end of the Great Recession, the Louisville MSA has seen an annualized decline in the unemployment rate. This trend is not unique to our region, and many factors – including strong business growth, a declining workforce participation rate, and retirements of baby boomers – contribute to the tightening labor force. A low unemployment rate is good for area residents, but also concerning for businesses struggling to fill positions or expanding to take advantage of new opportunities.

Through the WorkHub initiative, 1si is working to develop tangible programs centered around needs of the job provider. We strive to be the voice of the demand side – or employer side – of the supply-demand equation. We continue to work with resource providers on the supply side to improve the balance and match the supply side skills with the needs of the demand side. Ensuring business vibrancy in the community cannot be done without a sustainable pipeline of talent for growing businesses.

Serving our Members through Business Resource Services and Programming

Existing businesses create a stable environment by providing jobs for area residents, opportunities for local business-to-business commerce, consumer goods and services, and support of community activities. Notwithstanding these community benefits, local businesses drive wealth creation for the owners and employees. For these many reasons, the business resource team at 1si comprises much of the organization's visible work.

Business resource services at 1si include our education, networking, advertising and promotional activities. The purpose of these activities is to attain, retain and engage members in 1si to help empower our local businesses.

Providing Catalytic Leadership

The role of 1si in promoting a fiscally-stable, business-friendly environment transcends local, regional, state and national issues. Our members and investors support our leadership as a change agent to further our organizational mission. Through our leadership and advocacy initiatives, we promote positive change by serving as the "Champions of Ideas" to achieve economic and business vitality for the region. Additionally, we strive to provide for our investors and members access to policy makers through forums, roundtables and one-on-one meetings.

Collaboration for Regional Prosperity

Collaboratively solving problems of the region enhances the overall attractiveness of our communities, which in turn enhances our economic growth competitiveness. Building this type of culture in Southern Indiana will allow residents from all socio-economic demographics to participate and prosper in our regional economy. 1si will coordinate, facilitate and engage in strategic initiatives to maximize transformative activities throughout the region. We will be responsive to issues that have the potential for positively impacting the Southern Indiana region and our neighboring communities.

Organizational Sustainability

In order to lead our community through our big-picture goals and objectives, 1si performs many day-to-day activities to ensure the effective and efficient operation of our organization to serve our business members and investors, as well as the communities in which we operate. The longevity and ultimate effectiveness of these service activities depends upon successful administrative and fiscal accountabilities.



In addition to reaffirming our mission and vision and developing the strategic focus areas for our work, the Board of Directors approved six Core Values that provide the guidance for our organization's work.

As a non-profit organization that strives to meet the needs of the business community while also serving the greater good for all area stakeholders and residents, the Board of Directors of 1si renewed our commitment to the Core Values that will guide the organization not only in our strategic direction, but also in our day-to-day operations. In our quest for continuous improvement, our activities will be evaluated with these six Core Values to help us meet the expectations of our members, investors and community stakeholders.

The Core Values for our work are defined as follows:

Collaborative – Recognizing that the results we work to achieve have many benefactors, we also recognize that we will see greater success if we work together with our partners toward shared outcomes.

Proactive – As business and community leaders, we will work to initiate change for the betterment of our community rather than reacting to what takes place around us.

Resourceful – To best respond to the needs of our members, investors and stakeholders, we will apply ingenuity, take initiative, and express our capability in maximizing our advantages and overcoming challenges.

Inclusive – 1si creates a stakeholder experience that embraces the entire region – along with its diversity of partners – as individual business members with unique opportunities and distinctions that add to the economic and workforce opportunities for our complete communities.

Integrous – 1si will, as an organization, pride ourselves on our adherence to moral and ethical principles as we achieve our work with integrity. We will insist that our partners operate with the same level of integrity that we expect from ourselves.

Results-oriented – We recognize that the work we do is important. We will focus on the outcomes that result because of our actions. Our circumstances may change, but our adherence to measurable outcomes will not.

Influencing Factors: The Horizon Report



In 2014, the Association of Chamber of Commerce Executives launched the Horizon Initiative, a study focused on determining the top influences that will affect chambers in the next 10 years. The year-long study found eight trends that will change the way businesses interact with their local chambers and offered suggestions on how local associations like 1si may be able to remain relevant forces in business, as well as capitalize on the trends to enhance membership and increase engagement.

The results were published in 2015 in the white paper entitled, *HORIZON INITIATIVE: CHAMBERS 2025; Eight Influences Shaping the Next Decade for Chambers of Commerce*. Since that time, chambers across the country have begun altering their programs, member benefits and services to better address their members' needs, considering the eight factors noted in the report. Those factors include:

Changing attitudes regarding the **Nature of Belonging and Gathering**, especially as it relates to an increasingly diverse population and the entrance of the millennial generation in the workforce, will need to be considered when structuring membership, member benefits and community relations.

The continuous change in **Technology and Communication** will give rise to an expectation of individualized communication of most messages with original content, so chambers can be seen as a viable, trusted resource.

Business needs and success will be driven, in part, by maximization of natural and human resources, whether in **Scarcity or Abundance**.

While the volatility of the global stage will increase over the next 10 years, both business expansion and chamber growth can be driven by the **Globalization** of business and the nearly limitless opportunities occurring around the world.

The inevitability of **Demographic Shifts** in North America, related to race/ethnicity and to generational transition, will significantly affect chambers of commerce in the next decade and beyond. Building a future-focused chamber without an inclusion strategy would be, at best, unwise.

As **Social and Political Fragmentation** continues to divide people, it is within the battle for solutions and the desperate craving for leadership that chambers will find opportunity to embody "sane middle" pragmatism and reason over dogma.

In order to stay relevant, chambers will need to focus on community and regional causes more so than traditional business services, many of which can be found for free via the internet. This will necessitate a **Resource Alignment** so that revenue raised is allocated toward mission goals.

Chambers will need **Catalytic Leadership** - people who can align all their local forces for the benefit of the "business commons." This is a shared recognition that ". . . a skilled workforce, an educated populace, vibrant local suppliers, basic rule of law" matter to companies – as well as communities – and can only be achieved through the cooperative efforts of government, education, business and community.

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1si will continue to facilitate agreement on annual work strategies and key initiatives, and through collaborative execution, establish metrics and measure our results in the areas of full employment, an expanded tax base and economic self-sufficiency for individuals and communities.

Key Elements of our Work in this Area:

- Fostering high wage companies to enhance the quality of life of area residents;
- Retaining commerce by identifying and responding to needs of our existing employers;
- Assisting small businesses;
- Enhancing our existing businesses environment; and
- Marketing to external customers the competitive advantages of our area



Impact of Horizon Influencers

To be a competitive region for business vibrancy, 1si must:

- Move beyond transactional economic development and strive for true transformational priorities in our work;
- Determine the region's value proposition for retention of existing and attracting of future business projects;
- Better define entrepreneurship assistance, what should be accomplished and the expected returns on investment;
- Understand the ties start-up businesses have to quality of place amenities, as well as technology infrastructure;
- Recognize the ebbs and flows of community attractiveness for business growth to proactively identify new opportunities and survey for threats;
- Understand the shifting global realities and the impacts on local businesses.
- Create stronger ties to talent and workforce availability of community;
- Review diversity with inclusion models to ensure millennials to baby boomers have viable employment options; and
- Balance 1si's resource distribution between business attraction and business retention efforts.

What you will Observe from 1si

- To assist **existing companies**:
 - Coordinating the existing Business Retention and Expansion program in which staff conducts visits to at least 230 businesses per year to offer assistance for specific needs and to show appreciation for their dedication to our communities;
 - Facilitating interactions with local governments, which include managing requests for local incentives, coordinating state incentive processes and troubleshooting concerns;
 - Managing, hosting and growing the Metro Manufacturing Alliance, which provides a forum where manufacturing professionals can interact, share best practices, learn of new resources and discuss common issues and solutions;
 - Establishing and coordinating business assistance teams to assist companies in maximizing major opportunities or to help companies in distress; and
 - Assisting businesses in meeting their talent needs through engagement in the 1si WorkHub.
- To attract **new companies**:
 - Serving as the state-recognized Local Economic Development Organization (LEDO) for both Clark and Floyd counties;
 - Managing prospect inquiries, site visits, community tours and detailed requests for information;
 - Coordinating incentive packages (state and local) to ensure economic competitiveness of our area to close deals; and
 - Enhancing development of sites and assisting existing facilities to market a variety of available location options as inventory.
- To assist **small businesses** with resources and access to capital by:
 - Promoting and managing the Horseshoe Foundation of Floyd County Small Business Revolving Loan Fund; and
 - Engaging these companies in educational offerings to help them grow, maintain and protect their businesses;
 - Partnering with entrepreneurial resource providers to enhance the development of start-up companies.

Communicating and Branding our Work

- Participating in local, regional, state and national associations and partnerships with synergistic economic development goals and objectives;
- Defining local workforce impediments to our economic competitiveness and creating solutions-based consortiums on skill development as an imperative to economic development success;
- Facilitating the planning and build-out of infrastructure projects and vital community assets to enhance competitiveness;
- Developing a marketing schedule for targeted industry sectors, based upon sound research;
- Promoting the development and enhancement of state and local incentive programs, including retention of effective incentive tools;
- Purposefully planning, pursuing and securing economic diversification in Clark and Floyd counties; and
- Educating and coordinating local stakeholders to support the economic development strategy to maximize our advantages.

How We Measure Success

- Annual increases in the county average wages, which includes increasing low-to-moderate income levels;
- Increase migration of people into the area and decrease the migration out of the area;
- Ensure that new job creation averages an hourly rate of at least \$20 per hour;
- Increase local business diversity by tallying new or expanding business projects in at least ten (10) different NAICS categories;
- Perform 225 existing business calls and affect the retention of 350 jobs per year with existing employers;
- Secure annual commitments of \$45 million in new taxable capital;
- Close on four new small business loans each year through the Horseshoe Revolving Loan Fund and other capital start-up or growth sources; and
- Maintain MMA membership participation rate of 85%.

WorkHub: Cracking the Workforce/Talent Code



Since the end of the Great Recession, the Louisville MSA has seen an annualized decline in the unemployment rate. This trend is not unique to our region, and many factors – including strong business growth, a declining workforce participation rate, and retirement of baby boomers – contribute to the tightening labor force. A low unemployment rate is good for area residents, but also concerning for businesses struggling to fill positions or expanding to take advantage of new opportunities.

Through the WorkHub initiative, 1si is working to develop tangible programs centered around needs of the job provider. We strive to be the voice of the demand side – or employer side – of the supply-demand equation. We continue to work with resource providers on the supply side to improve the balance and match the supply side skills with the needs of the demand side. Ensuring business vibrancy in the community cannot be done without a sustainable pipeline of talent for growing businesses.

Key Elements of our Work in this Area:

- Engaging existing businesses in understanding talent needs of the region;
- Coordinating initiatives that increase the pipeline of workers interested in industry sectors with the most need;
- Consulting with existing businesses to create key indicators of employee engagement;
- Embracing the rewards associated with lifelong learning through opportunities with educators; and
- Connecting employers with resource providers that can have direct solutions to talent issues and needs.

Impact of Horizon Influencers

To best address workforce needs across the region and help area employers compete for talent, 1si must:

- Recognize the generational differences and its impact on needs in the workplace;
- Define and promote programs and WorkHub messages that attract attention of employers;
- Adjust to the growing trends of W-9 workers expected in future;
- Develop programming that is specific and direct instead of general and vague;
- Research data with analysis to predict future realities our members will face, along with the changing needs of our residents;
- Benchmark successful programs in other communities; and
- Align support, leadership and communication strategies to create sustainable programs.

What you will Observe from 1si

- Convening industry sectors to understand and aggregate their hiring needs;
- Developing programs and alliances with and between employers to address specific training needs;
- Creating a talent development council for sharing ideas and concerns among 1si's membership;
- Creative programming of events, seminars and classes to help employers identify talent and train incumbent workers; and
- Benchmarking of community successes for those that have shown regional workforce successes.

Communicating and Branding our Work

- Establish 1si's WorkHub as the connector for employers facing workforce challenges;
- Develop and update annual reports on employment conditions in Southern Indiana;
- Promote industry-specific best practices for employers;
- Collect and distribute testimonials from employers on the correlation of employee satisfaction to employee retention and company profitability; and
- Tie communications about WorkHub with funding requests.

How we Measure Success

- Increase the relevancy of our work in this area to employers experiencing the greatest need;
- Create a dashboard for employers to measure employee engagement;
- Increase member participation in WorkHub programming;
- Gain feedback from companies assisted by WorkHub;
- Host annual events that enhance the image of skilled careers; and
- Develop long-term metrics for success for the WorkHub, including sustained funding sources.

Serving our Members through Business Resource Services and Programming

Existing businesses create a stable environment by providing jobs for area residents, opportunities for local business-to-business commerce, consumer goods and services, and support of community activities. Notwithstanding these community benefits, local businesses drive wealth creation for the owners and employees. For these many reasons, the business resource team at 1si comprises much of the organization's visible work.



Business resource services at 1si include our education, networking, advertising and promotional activities. The purpose of these activities is to attain, retain and engage members in 1si to help empower our local businesses.

Key Elements of our Work in this Area:

- Hosting events and programs directed to maximize benefit to our members;
- Educating members as to what 1si does to increase the value of their membership;
- Targeting communication of events to maximize networking and educational impact;
- Maintaining and increasing performance metrics for our events and programs to show benefit to our organization, our members and our sponsors; and
- Promoting our member businesses.

Impact of Horizon Influencers

To ensure member participation in our organization, 1si must:

- Recognize that each member chooses to be a member and doesn't view membership as an obligation;
- Give them network opportunities with a theme or purpose;
- Offer options with their membership – find ways to add ala carte benefits;
- Create greater efficiencies in communications through technology;
- Help business leaders cope with the local impacts of global policies;
- Encourage business leaders to engage their next generation of leaders in 1si; and
- Create more targeted groups that fit the regional demographics and focus on topics with universal acceptance.

What you will Observe from 1si

- Providing core business services programming that transcends industry sectors;
- Developing timely educational forums to help business owners make informed business decisions;
- Identifying, implementing and maximizing affinity programs;
- Strengthening business resource services by exploring regional partnership opportunities with regional benefits;
- Establishing direction and results mechanisms to enhance the experiences for volunteer committees, including the 1si Ambassadors;
- Enhancing membership services to maximize value received at different levels within the tiered membership structure;
- Maximizing the value of events as measured from the member point-of-view;
- Cultivating small businesses by showing 1si value adds to their bottom lines;
- Targeting business resource services to business owners who are young or minority; and
- Working with partner merchant associations to strengthen business-to-consumer connections.

Communicating and Branding our Work

- Establishing and improving upon the value proposition that 1si offers our members;
- Distinguishing our brand recognition throughout the region;
- Enhancing communications methods to inform members of services and upcoming events;
- Maximizing social media strategies for member engagement;
- Acquiring and applying member feedback for continuous improvement; and
- Benchmarking 1si's offerings and results with similar organizations, both regionally and nationally.

How we Measure Success

- Maintain the annual membership retention rate at or above the national average reported by peer organizations;
- Track and report that 90% of members participate in 1si activities each year;
- Improve the member feedback system for each event, and achieve satisfactory or higher results from participants;
- Similarly, improve the sponsor feedback system for each event, and achieve satisfactory or higher results from sponsors; and
- Increase potential member prospect activity within existing services offered by 1si.

Providing Catalytic Leadership



The role of 1si in promoting a fiscally-stable, business-friendly environment transcends local, regional, state and national issues. Our members and investors support our leadership as a change agent to further our organizational mission. Through our leadership and advocacy initiatives, we promote positive change by serving as the “Champions of Ideas” to achieve economic and business vitality for the region. Additionally, we strive to provide for our investors and members access to policy makers through forums, roundtables and one-on-one meetings.

Key Elements of our Work in this Area

- Opportunities and access for members and investors to discuss business and leadership issues with their elected officials in local, state and federal positions;
- Development of an annual advocacy agenda that hits key visionary, long-term strategies;
- Enhanced collaborations with regional, state and national partners on issues important to 1si members and investors;
- Partnering with governmental officials to implement projects that add to the “Quality of Place” and enhance our business environment; and
- Establish and build upon our role as a change agent with state and federal agencies and officials.

Impact of Horizon Influencers

- To serve our business community through catalytic leadership, 1si must:
- Identify local independent voices on issues and convene them together around the topics of interest;
- Get out in front of issues by proactively identifying those who are passionate to help;
- Develop faster mechanisms for faster decision making;
- Access information and analytics before taking positions and influencing decisions;
- Encourage public policy to arise through business leaders instead of government; and
- Institute rapid response for negotiations and conflict resolution

What you will Observe from 1si

- Enhancing relationships with local government to ease the path for business vibrancy;
- Establishing dialogue with local policy makers to advance two-way communication on issues;
- Creating regional advocacy alliances to strengthen Southern Indiana’s voice with state policy makers;
- Facilitating discussions with elected officials, business leaders and the public about key policy issues and strategic objectives;
- Adopting an annual Advocacy Agenda as negotiated by the Advocacy Council;
- Recognizing that the positions taken are not based upon popularity, and stand firm towards desired results; and
- Partnering with other local, state and regional organizations on common policy positions.

Communicating and Branding our Work

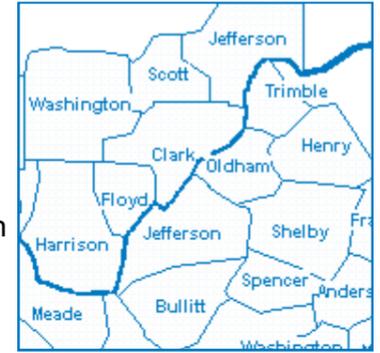
- Brand 1si as a convener and facilitator between businesses with city, county and state governments;
- Distribute a position statement and follow-up report on each idea 1si champions;
- Publicize 1si’s Advocacy Agenda each year;
- Initiate crises intervention action plans for immediate response to negative coverage; and
- Demonstrate relevance as an “expert” with local, regional and state media sources.

How we Measure Success

- Facilitate and assist in one significant community or infrastructure project each year;
- Host at least four advocacy events each year to give members and investors access to elected and appointed officials;
- Conduct at least one educational advocacy event each year for members and investors; and
- Host at least one business roundtable event on advocacy positions each year.

Collaboration for Regional Prosperity

Collaboratively solving problems of the region enhances the overall attractiveness of our communities, which in turn enhances our economic growth competitiveness. Building this type of culture in Southern Indiana will allow residents from all socio-economic demographics to participate and prosper in our regional economy. 1si will coordinate, facilitate and engage in strategic initiatives to maximize transformative active ties throughout the region. We will be responsive to issues that have the potential for positively impacting the Southern Indiana region and our neighboring communities.



Key Elements of our Work in this Area

- Enhancing the initiatives of the Our Southern Indiana Regional Development Authority and other regional planning organizations;
- Convening business leadership and involvement with K-12 educational institutions and the State of Indiana's Pathway graduation criteria;
- Promoting social entrepreneurship by using business concepts and principles to bring about positive change to community concerns; and
- Facilitating government partnerships to maximize consistency and effectiveness of local economic development tools.

Impact of Horizon Influencers

To increase our regional prosperity, 1si must:

- Recognize that the economic vibrancy of our region transcends geographical and political boundaries;
- Understand that greater transparency of decisions leads to accountability and eliminates civic dysfunction;
- Distinguish between real needs and perceived needs;
- Promote that true collaboration is built on trust and respect;
- Preach that Southern Indiana is stronger and more competitive as a region than as a set of individual communities; and
- Show unengaged members of our community a message that attracts and includes them.

What you will Observe from 1si

- Continuing regular dialogue opportunities for our elected officials;
- Supporting business engagement with the Academies of Greater Clark in conjunction with the Ford Next Generation Learning initiative;
- Promoting "quality of place" partnerships to enhance the livability in Southern Indiana;
- Collaborating with local governments on areas of concern to our business members;
- Improving regional infrastructure to better serve residents and businesses;
- Complimenting the regional activities of Align Southern Indiana and other non-profits; and
- Engaging with policy makers to enhance our regional location advantages.

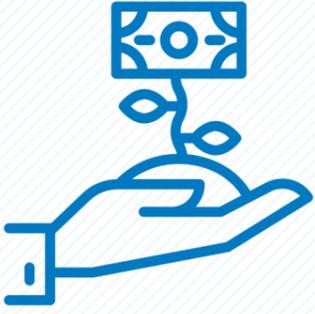
Communicating and Branding our Work

- Create communications guidelines with partners early in collaborative processes;
- Convene stakeholders in planning stages of applicable 1si projects and initiatives;
- Celebrate milestone accomplishments with collaborative partners;
- Promote partnerships that contribute to successful initiatives; and
- Document processes where multiple partners are engaged.

How we Measure Success

- Increase the number of strategic partners with whom 1si engages on strategic work;
- Engage in community dialogues with education partners and business leaders to discuss workforce needs;
- Assert 1si's voice in statewide policy discussions on economic development and other policy-level discussions each year through partner and membership organizations;
- Ensure millennials are included in collaborative work;
- Engage organizational leadership in community benchmarking exercise each year; and
- Participate in at least three pivotal meetings or events each year on collaborative projects.

Organizational Sustainability



In order to lead our community through our big-picture goals and objectives, 1si performs many day-to-day activities to ensure the effective and efficient operation of our organization to serve our business members and investors, as well as the communities in which we operate. The longevity and ultimate effectiveness of these service activities depends upon successful administrative and fiscal accountabilities.

Key Elements of our Work in this Area

- Governing to maximize engagement of various board members, staff, investors, members and other stakeholders in securing investors and members;
- Providing financial oversight of all operations of the organization and our related entities;
- Promoting staff and volunteer development activities;
- Goal-oriented fundraising efforts as spear-headed by our Investor Relations Committee;
- Exploring opportunities and implementing strategies toward organizational sustainability; and
- Holding the Board of Directors and staff to financial accountability for all activities.

Impact of Horizon Influencers

To ensure integrity in our financial and governance processes, 1si must:

- Monetize value propositions for services and activities to show a return on investment to members and the organization;
- Allow members to choose add-on services for which they are willing to pay;
- Build our financial future around serving the next generation of business leaders;
- Invest in technologies that enhance the member experience; and
- Align resources with the needs identified by members.

What you will Observe from 1si

- Good stewardship of resources that are entrusted to us, and annual audits authenticating our successful administration of these funds;
- Continued financial sustainability through increased membership, additional investors and non-dues revenue sources;
- Annual budgets that depend upon return on investment of our activities in addition to fundraising;
- Expansion of the number of investors and members in our organization, with special attention to those companies that have benefited from our economic development services;
- Continued emphasis on staff development, both as individuals and as a team;
- Successful pass-through programs operating zero-balance budgets;
- Organizational governance that is not only responsive to our members and investors, but also efficient and strategic;
- Maximizing the OSI Foundation's role in funding economic development priorities;
- Benchmarking against similar organizations on financial support and member engagement; and
- Exploring the acquisition of appreciating assets for 1si.

Communicating and Branding our Work

- Improved communication and meaningful relationship management with our financial contributors;
- Develop and market a value proposition to identify financial worth and relevance
- Creative engagement for business and community leaders in providing subtle guidance, persuasiveness, influence, and maximizing synergies from our partnerships;
- Report the reviews of 1si's membership dues and investor tiered structures; and
- Thorough communications with the Board of Directors and Executive Committee so that volunteer members are engaged in effective meetings and decision-making processes.

How we Measure Success

- Develop annual budgets that direct activities in accordance with strategic priorities;
- Enhance financial dashboard to chart financial progress month-to-month;
- Develop and promote annual fundraising goals that increase revenues by at least 5% per year;
- Proactive forecasting of accounts receivable/accounts payable and trending of economic status;
- Increase percentage of public funding/fee-for-service to meet national averages for similar organizations; and
- Conduct staff performance reviews annually, to include individual development plans.