

Indiana Chamber Strategic Plan

Goal Area: Finance

STRATEGIC PLAN 2014 - 2016

Continue sound **financial** performance, with reasonable growth, across all entities

| Objectives | Measures | Metrics & Timeframes | Key Strategies | Accountable Staff / Assumptions |
|--|-----------------------------|--|---|---|
| Increase net operating margin of Indiana Chamber and its for-profit entities | Net Operating Margin Growth | Break-even Fiscal Year 2014; 1% of revenue annually Fiscal Years 2015 and 2016 | Increase member/customer revenue by demonstrating value | Entire staff (revenue producing, controlling expenses, member/customer retention) |
| Increase funds raised for the Indiana Chamber Foundation | Funds Raised | \$3,000,000 in Indiana Vision 2025 funds by Fiscal Year 2016 | Further implement a direct giving and planned giving program | Kevin Brinegar and Mark Lawrance |
| Increase funds raised per campaign cycle for Indiana Business for Responsive Government PAC | Funds Raised | \$100,000 increase per election cycle for IBRG and 20% increase per election cycle for Business Impact Fund | Grow revenue by expanding donor base | Kevin Brinegar, Jeff Brantley and Ashton Eller |
| Improve strength of balance sheet | Net Assets (Fund Balance) | \$750,000 by Fiscal Year 2016 | Increase member/customer revenue by demonstrating value | Impacted by pension liability discount rate |
| | Cash Reserves | 5% increase by Fiscal Year 2016 | | Impacted by market value performance of investments |
| | Pension Liability Funded | 110% of required quarterly pension contributions and 100% of plan year-end pension contributions annually through Fiscal Year 2016 | | Assumes that over 40% of active employees are plan participants, as currently required by federal law |
| Asset Protection | AntiVirus and Patch Status | Maintain software/hardware patches/definitions | Patch software and hardware in 14-day cycles | Jeff Hardesty |
| | Intrusion Protection | Monitor, Detect, and Eliminate security vulnerabilities and breaches | Monitor threat reports, firewall and antivirus reporting and logging. | Jeff Hardesty |
| | High Availability | Maintain all critical systems at the availability levels set forth by Senior Staff | Monitor high availability services. Proactively re-allocate resources as needed. Maintain 3 year plan for future resource requirements. | Jeff Hardesty / Greg Wiley |
| | Disaster Recovery | Documentation, Failover Testing, Backup Restore Testing | Maintain documentation on SharePoint Online. Test failover and backup methods on a weekly basis. | Jeff Hardesty |

Indiana Chamber Strategic Plan

Goal Area: Leadership

STRATEGIC PLAN 2014 - 2016

Provide **leadership** in implementing *Indiana Vision 2025* and developing new leaders

| Objectives | Measures | Metrics & Timeframes | Key Strategies | Accountable Staff / Assumptions |
|---|--|---|--|---|
| Lead implementation of Indiana Vision 2025 | Keep plan current | Revise plan during 2015 | Maximize accomplishment of goals in Indiana Vision 2025 | Assumes plan will need revision. Kevin Brinegar, Cam Carter and Mark Lawrance |
| | Buy In - Candidates elected who pledge support | 60% of the people who serve in the General Assembly should be identified as having significant support for the plan after the 2014 and 2016 elections | | Assumes turnover in the legislature. Government Affairs Team |
| | Successful implementation - legislative & executive enactments | 40% of recommendations in Indiana Vision 2025 enacted by legislature or governor by 2016 | | Government Affairs Team |
| | Indiana Vision 2025 recommendations incorporated into the gubernatorial platform for 2016 | 60% of Indiana Vision 2025 recommendations incorporated into the gubernatorial plan for 2016 candidates | | Kevin Brinegar/Mark Lawrance |
| Cultivate pro-business mindset leaders capable of identifying and solving complex problems | Individuals identified engaged with issues within the plan. | 400 individuals (133 per region) by 1/1/2015 | Engage leaders and organizations to drive legislative support of Indiana Vision 2025 | Assumes continuation of regional forums and activities. |
| | Meaningful engagements on issues, including mentoring for future political leadership positions | 80% of total individuals engaged | | Government Affairs Team |
| Facilitate synergy between leaders to influence pro-economy culture | Chamber regional forums and statewide summit conducted enabling improved communication across academic, political, foundation and business interests | 2 sets of regional forums and one statewide summit conducted by 2016 | Leverage convening and leadership role by partnering with state and regional organization leaders to conduct joint sessions. Broaden reach of organizations engaged in plan. | Kevin Brinegar/Mark Lawrance |
| | Engage programmatic stakeholders with specific goals of Indiana Vision 2025 | Detailed plan of action developed for priority issues within IV 2025 | | Government Affairs Team |
| Increase the pool of qualified legislative candidates from both parties | Qualified legislative candidates | At least one qualified candidate in each primary and general election in targeted districts | Use IBRG to aggressively pursue targeted districts to identify and mentor interested citizens | IBRG |

Goal Area: Leadership

STRATEGIC PLAN 2014 - 2016

Provide **leadership** in implementing *Indiana Vision 2025* and developing new leaders

| Objectives | Measures | Metrics & Timeframes | Key Strategies | Accountable Staff / Assumptions |
|--|--------------------------------|---|---|---|
| <p>Increase volunteer and staff leadership capacity</p> | <p>Staff Effectiveness</p> | <p>Development plan in place for each member of staff to increase transferrable knowledge by October 31 each year. Review and enforce operational excellence standards.</p> | <p>Increase Board Member engagement and operational excellence of staff</p> | <p>Assumes the development of additional standards around communications, IT, data protocol, board engagement, membership and financial systems. Senior Staff</p> |
| | <p>Volunteer Effectiveness</p> | <p>Enhance opportunities for board engagement. Establish mentoring for incoming and newer board members.</p> | | <p>Senior Staff</p> |
| | <p>Board Member Engagement</p> | <p>84% by year-end 2014; 88% by year-end 2015; 90% by year-end 2016</p> | | <p>Senior Staff</p> |

Indiana Chamber Strategic Plan

Goal Area: Communication

STRATEGIC PLAN 2014 - 2016

Effectively **communicate** organizational priorities and programs

| Objectives | Measures | Metrics & Timeframes | Key Strategies | Accountable Staff /Assumptions |
|--|--|---|--|---|
| Focus on key strategic priorities | Communications aligned with strategic priorities | 80% of all communications each year | Evaluate each communication prior to/in conjunction with its distribution | Symone Skrzycki |
| | Communications aligned with brand standards | 100% of communications | Evaluate each communication prior to/in conjunction with its distribution | Symone Skrzycki |
| Engage members/constituents through existing communication channels | Enhance value of BizVoice magazine | 10% annual increase in member/customer participation (advertisers, authors, sources); 5% annual growth in positive survey responses on magazine value | Refresh BizVoice brand; survey readers/advertisers; tie in Indiana Chamber connections; cross promote content | Tony Spataro Tom Schuman Charlee Beasor |
| | Increase engagement in legislative communications | 5% annual growth in average Legislative Report readership | Survey readers; increase video/audio links | Rebecca Patrick |
| | Improve social media dialogue | 10% annual growth in blog, Twitter, Facebook interactions | Capture more member/press social media information; enhance our social media content; incorporate contests/other tools to drive interaction | Matt Ottinger |
| | Development of mobile version of Chamber web site | Complete and implement in 2014 | Work with IS and other Chamber teams; develop/execute plan | Tony Spataro |
| Advance understanding and support of Indiana Vision 2025 | Chamber outreach | Coverage in all issues of BizVoice magazine | Engage current stakeholders (forum/summit participants, task force members) and develop new stakeholders through use as subject matter experts | Tom Schuman |
| | | Quarterly communications with stakeholders | Survey stakeholders to determine current awareness/next steps | Tom Schuman |
| | Statewide media coverage | Minimum 15 quality media placements each year; 25 in 2015 (Report Card issued) | Increase stakeholder use as spokespersons; engage in media conversations on topic; minimum three outreaches per year | Rebecca Patrick Tom Schuman |
| Improve understanding/reach of Chamber through statewide media engagement | Outputs to media | Minimum 18 press releases/statements on policy topics; monthly editorial columns; six editorial board visits | Work with GA team to better anticipate news and be prepared with timely releases/statements in conjunction with state/national developments | Rebecca Patrick Charlee Beasor |
| | Collaborations with advocacy coalition/policy partners | 4-6 joint media efforts each year | Identify additional potential partners; build on existing relationships | Rebecca Patrick Charlee Beasor |

Indiana Chamber Strategic Plan

Goal Area: Advocacy

STRATEGIC PLAN 2014 - 2016

Excel in legislative **advocacy** and political efforts at state and federal levels

| Objectives | Measures | Metrics & Timeframes | Key Strategies | Accountable Staff / Assumptions |
|---|---|---|--|--|
| Develop and execute policy solutions to achieve Indiana Vision 2025 goals | Legislation passed in support of Indiana Vision 2025 priorities | 30% by year-end 2016 | Continue regional forums and other outreach to enhance bi-partisan support to achieve goals of Indiana Vision 2025 | Government Affairs Staff, Communications Staff |
| | Non-policy initiatives/partnerships to further Indiana Vision 2025 priorities | 1+ initiative/partnership for each non-policy Indiana Vision 2025 goal by 2015 year-end | Develop and execute plans/partnerships with all and stakeholders' organizations to achieve Indiana Vision 2025 goals | Senior Staff, Government Affairs Staff |
| Elect pro-job, pro-economy legislators | Legislators in the General Assembly with high pro-job, pro-economy vote scores | 60% of Legislators in the House and Senate with LVA scores > 70% or 50% w/ P-Base of 1.3 or higher in 2014 and 2016 | Enhance IBRG candidate recruitment and fundraising processes | Public Affairs Staff |
| | Legislators elected in competitive races (i.e., within 10 point pre- and post-election) endorsed by ICC | 60% success rate in 2014 and 2016 | | Public Affairs Staff |
| | Elected pro-job, pro-economy legislators in General Assembly supported by ICC | 67% of General Assembly in 2014 | | Public Affairs Staff |
| Achieve positive legislative reforms in support of Indiana Vision 2025 goals | Pro-Indiana Vision 2025/pro-job, pro-economy legislation passed | 50% signed vs. total proposed by 2016 | Continue/expand communication and advocacy of Indiana Vision 2025 goals to various stakeholders | Government Affairs Staff |
| | Anti-business legislation defeated | 90% defeated vs. total proposed by 2016 | | Government Affairs Staff |
| | Lowest Business Cost Ranking | Top 10 States in United States | | Government Affairs Staff |
| | D.C. Fly-In participation by delegation members | 9+ delegation members participating in the Fly-In each year | Continue/enhance outreach to Indiana delegation members and staff through GA staff and Congressional Affairs Committee | Cam Carter, Kevin Brinegar, Government Affairs Staff |
| | Collaborative endeavors with members of the Indiana delegation | 2+ collaborative endeavors with delegation members each year | | |
| | Visits to and communications with the Indiana delegation | 3+ visits with each delegation member/office and state advocacy communications each year | | |

Goal Area: Advocacy

STRATEGIC PLAN 2014 - 2016

Excel in legislative **advocacy** and political efforts at state and federal levels

| Objectives | Measures | Metrics & Timeframes | Key Strategies | Accountable Staff / Assumptions |
|--|---|--|---|--|
| <p>Achieve positive federal legislative reforms in support of Indiana Vision 2025 goals</p> | <p>Indiana Congressional delegation vote scores in support of Indiana Vision 2025 Goals</p> | <p>75% positive vote score by at least 8 members of the delegation</p> | <p>Maintain/enhance collaborative relationships with delegation members and staffs for effective federal advocacy</p> | <p>Government Affairs Staff, Congressional Affairs Committee</p> |

Indiana Chamber Strategic Plan

Goal Area: Member/Customer Engagement

STRATEGIC PLAN 2014 - 2016

Develop and engage a strong, diverse **member** and **customer** base

| Objectives | Measures | Metrics & Timeframes | Key Strategies | Accountable Staff / Assumptions |
|---|--|---|--|--|
| Membership Development | Total members at year end | Maintain 4,800 members annually | Increased new member sales through board involvement | Brock Hesler Brett Carrington |
| | Target (Top 200) companies as members at year end | 5% annual increase | Face-to-face visits are imperative to grow relationships | Matt Volk Brett Hulse Jeremy Rust |
| Grow Membership in High-Tech & Advanced Manufacturing | Targeted growth of new members in both markets | 10% growth of new members within targeted markets | Targeted letter campaigns; board member involvement | Brock Hesler Glenn Harkness |
| Improve Member Retention | Total member retention | 88% | Education of ChamberCare accounts despite loss of discount; Value advocacy | Brock Hesler Brett Carrington Jeremy Rust |
| | Total member revenue retention | 90% | Education of ChamberCare accounts despite loss of discount; Value advocacy | Brock Hesler Brett Carrington Jeremy Rust |
| | Top 200 companies member retention | 95% | 50-60 face-to-face meetings per year | Brock Hesler Brett Carrington Jeremy Rust |
| | Top 200 companies member revenue retention | 98% | Grow Cornerstone Partners Program | Brock Hesler Brett Carrington Jeremy Rust |
| New Customer Development | Total customers at year end | 3% increase annually | Leverage across departments the expertise of our new marketing manager | Nick Ostergaard Glenn Harkness |
| Continuously Evaluate and Diversify Programs and Services to Best Meet Member and Customer Needs | Customer satisfaction | Maintain 4.55 average annually | Deliver timely, high-quality programs and services | Kerri Begley Glenn Harkness Lizzie Kallas Matt Ottinger |
| | Programs, products and services - utilization rate | 10% annual increase | Refine use of Real Magnet and eCommerce | Laura Bliss Nick Luchtefeld Nick Ostergaard |
| | Products - repeat purchasers | 12% annual increase | Better utilize member profile data at customer service connect point | Glenn Harkness |
| Increase Customer Revenue | Customer revenue growth | 3% annual increase | Enhance portfolio of relevant products and services | Kerri Begley Glenn Harkness Matt Ottinger |
| Leverage Wellness Council of Indiana to Grow Revenue | Education and development of attractive business culture | 15% increase annually | Market the AchieveWELL process to help build strategies for organizations to manage and sustain a successful workplace wellness initiative | Chuck Gillespie |