

Scheduled Meeting of Executive Committee

Virtual by Zoom Meeting

January 8, 2026



Our Mission Statement

The Orange County Business Council represents and promotes the business community, working with government and academia, **to enhance Orange County's economic development and prosperity in order to preserve a high quality of life.**

Foundational Basis

- **We must grow our economy to preserve and enhance the quality of life we enjoy in Orange County**
 - Retraction and no-growth strategies are not viable options
 - Involves private sector, public sector, non-profits
 - Opportunity for ALL segments of Orange County
- **Private capital provides the basis for economic prosperity**
 - Public policy must provide the optimal environment to inspire private investment
 - Tax revenue and non-profit fundraising are dependent upon private sector
- **Everything centers around economic development**

Organization

Board Leadership

- Chair
 - Larry Chung (SoCal Edison)
- Chair Elect
 - Nicole Suydam (Goodwill OC)
- Treasurer
 - Payman Roshan (Kaiser)
- Immediate Past Chair
 - Rebecca Hall (Idea Hall)

Key Updates & Priorities

- Investor Growth & Collections
- Industry Cluster Strategy
- OCBC Connections
- AP Business Education Project
- GrowthZone Implementation
- Focus on Effectiveness
- Board Meeting Format Changes

Economic Development

Committee Leadership

- Chair
 - Enrique Perez
RSCCD
- Vice Chair
 - Jessica Fernandez
SoCal Edison

Key Updates & Priorities

- California Jobs First Implementation Grant Round 2
- Foreign Direct Investment
- MedTech Cluster
- Jobs First Sector Activation Plans
- Chamber Relationships

Workforce

Committee Leadership

- Co-Chairs
 - Julianna Barnes
SOCCCD
 - Shari Battle
Bank of America

Key Updates & Priorities

- Workforce Committee and College Board Grant

Housing

Committee Leadership

- Co-Chairs
 - Susan Hori
Manatt, Phelps & Phillips, LLP
 - Ben Rubin
Nossaman LLP
- Vice Chair
 - Steven Oh
Related California
 - Bill Shopoff
Shopoff Realty Investments

Key Updates & Priorities

- Housing Committee for 2026
- February Housing Committee Meeting

Infrastructure

Committee Leadership

- Co-Chairs
 - Felipe Monroig
Charter Communications
 - Cedric Williams
SoCal Gas
- Vice Chairs
 - Darrell Johnson
Orange County Transportation Authority
 - Dave Warner
HNTB

Key Updates & Priorities

- Infrastructure Committee Meetings for 2026
- February Infrastructure Committee Meeting

Quality of Life – preserving our strengths as we grow

- Access to quality healthcare
- First responders
- Equal Opportunity
- Environmental responsibility
- Trends in regional homelessness

OCBC Connections Topics

Tentative Schedule for 2026:

- January- Prop 36
- March- Affordable Housing Access Platform
- March- Slalom Healthcare Innovation
- April- Future Workforce with Senator (Ret.) Josh Newman
- June- Electricity Modernization, Reliability and Affordability

Government Affairs

Committee Leadership

- Co-Chairs
 - Diana Kot
SchoolsFirst Federal Credit Union
 - Cathi Killian
The Disneyland Resort
- Vice Chairs
 - Steve Finnegan
Automobile Club of Southern California
 - Larry Labrado
Disneyland Resort

Key Updates & Priorities

- 2026 Priorities
- January 13: Sacramento Fly In
- Prep for March Sac Advocacy Trip
- PAGA/SB130
- BACA Ballot Initiative
- GAC:
 - January 9th – Supervisor Wagner
 - February – Senator Blakespear
 - March – Assemblywoman Dixon
 - *Subject to change based on availability*

BizPAC

Recent Actions

- Contributions:
 - None
- Endorsements:
 - Josh Newman, SPI
 - Avelino Valencia, SD-34
 - Young Kim, CD-40
- Unrestricted \$88,219.93
- Restricted \$21,273.79

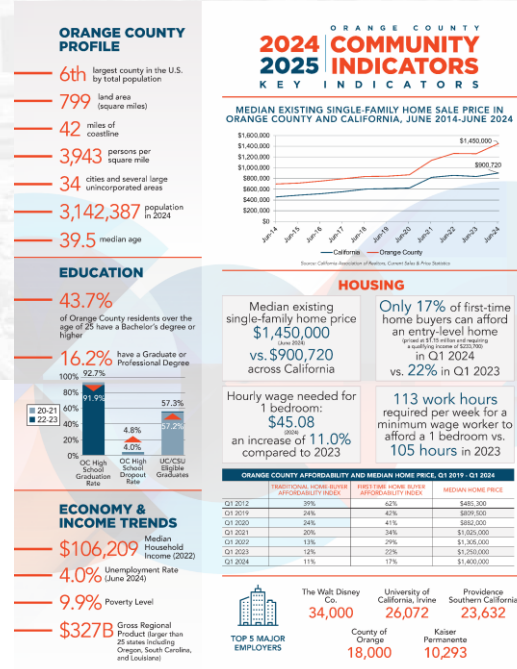
Key Updates & Priorities

- Need to Increase participation
- Fundraisers
- Ensure business focus
- Coalition alignment
- Consider out-of-region

* Please note that BizPAC is a sponsored PAC with its own Governance Structure. This information is being provided for informational purposes only.

Research

2024 ORANGE COUNTY COMMUNITY INDICATORS



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Key Updates & Priorities

- Catalyst Support
- Community Indicators Report
 - Theme: OC Innovation
 - Sponsorship Growth
 - Released November 13, 2025
- Special Research Projects

Events



Key Updates & Priorities

- Annual Dinner (Feb 26)
 - Board secure table/sponsorship
- Sacramento Trip (Mar 23-24)
- Save the Dates:
 - Health Care Forum (May 6)
 - Legislative Day (July 21)
 - First Responders (Sept 16)
- Full Event Sponsorship Listing Page

Public Affairs

Committee Leadership

- Chair
 - Abigail Lovell
Experian

Key Updates & Priorities

- Social Media Engagement, Strategy
- OCBC Sizzle Reel
- Website Refinement Continues
- Expanded Marketing, Digital Engagement
- Proactive Media Relations Efforts
- Strengthen OCBC's Brand Presence

Investor Relations

Committee Leadership

- Chair
 - Eric Morgan
FivePoint Holdings

Key Updates & Priorities

- 2025 Annual Revenue update
- 2025 Receivables update
- Key Prospect Development
- Current Prospective Investors
- Use of OCBC Meetings & Events

Strategic Partners

Organizations that share in OCBC's common goals of economic development and opportunities for all...

- Local Non-Profits
- Local Chambers
- Ethnic Chambers
- Public Agencies

Key Updates & Priorities

- Chamber Leadership Lunches
- Presentations to Chambers
- Community Indicators Report



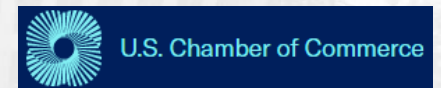
Coalition Partners

Advocacy organizations across the state and country which share in our common goal of economic development and opportunities for all...

- Other Regional Business Organizations
- United States Chamber of Commerce
- California Chamber of Commerce
- Industry Associations

Key Updates & Priorities

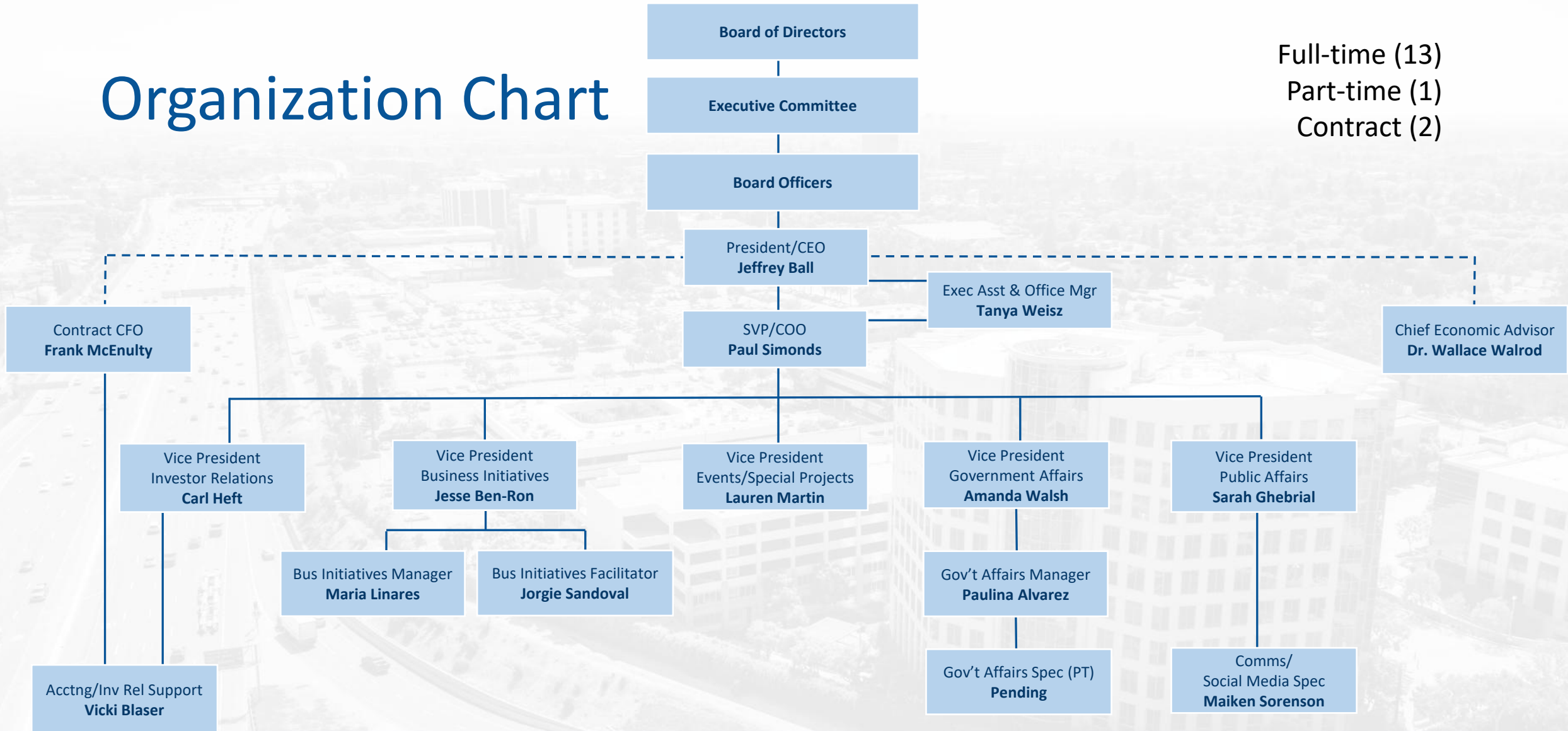
- Industry Association Partners
- CA Business Leaders Alliance
- Mod Dem Caucus Meetings
- Coalition with LA, IE, San Diego



Financial Update

- YTD Financials (through November, 2025) (Exhibits C & D)
 - Projected break-even for 2025
 - Surplus of \$454k going into December
 - Minimal Revenue in December
 - Projected \$200k in expenses for December
 - Projected \$250k for Receivables Write-off
 - Includes \$173,000 in ERC Credits
- Balance Sheet remains strong
 - Strong cash position and no debt
- Integration of GrowthZone with Quickbooks
- Continued Operational Efficiencies and Cost Controls

Organization Chart



GrowthZone CRM Update

- Serves Membership, Events, and Communications management
- Strategic Benefits:
 - Centralized database accessible to all departments in real time
 - Enhanced investor, sponsor, and prospect tracking/managing
- Current implementation plan and status
 - Completed:
 - Initial Onboarding, Basic Setup and Training Modules
 - Next steps:
 - Staff Training, importing lists/committees, building events
 - Timeline for staff training: 30 days. Full implementation: 60 days

2026 Priorities

- Investor Growth & Retention
- Industry Cluster Strategy
- Catalyst Completion
- Public Affairs Strategy
- AP Business Course Development
- GrowthZone Implementation
- Further Operating Efficiencies
- Board Meeting Format Changes

Thank you
for your
Leadership
&
Support!

