

Executive Committee Meeting

Virtual by Zoom Conference

April 9, 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 & Retention
- Industry Cluster Strategy
- CA Legislative Session
- JobsFirst Completion
- AP Business Course Development
- GrowthZone Utilization
- Further Operating Efficiencies
- Rewrite Organizational Bylaws

Economic Development

Committee Leadership

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

Key Updates & Priorities

- On Site Economic Development Committee Meetings
- MedTech Cluster
- International Business Attraction

Workforce

Committee Leadership

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

Key Updates & Priorities

- County of Orange Workforce Development Grant
- Grant Opportunities through the U.S. Chamber Foundation
- LEA Podcasts Recorded
- HR Forum

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

- **May Housing Committee Meeting**
- **Connections Event with Orange County United Way**

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

- April Infrastructure Committee Meeting
- Joint Meetings with Economic Development

OCBC Connections Topics

Upcoming Schedule for 2026:

- April- Affordable Housing Access Platform
- April- Housing Roundtable with Rep. Dave Min
- May- Charter Schools: Workforce Future
- June- AI Training for Businesses with Rancho Santiago Community College District
- Pending- Economics of Air Mobility

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 Legislative Session
 - AB 1776(Aguiar-Curry) - Antitrust - **Oppose**
 - AB 1790(Connolly) - Taxation - **Oppose**
 - AB 2418(Gonzalez) - Permitting - **Support**
 - SB 1075(Reyes) - Air Quality - **Oppose**
- March Sacramento Advocacy Trip
- County Climate Action Plan Update
 - Influenced removal of Chapter 4
- Government Affairs Committee:
 - April 10th – Supervisor Katrina Foley
 - *Subject to change based on availability*
- Gubernatorial Candidate Meetings

BizPAC

Recent Actions

- Contributions:
 - Tony Strickland, SD-36
 - Laurie Davies, AD-74
 - Cottie Petrie-Norris, AD-73
 - David Penaloza, AD-68
 - Avelino Valencia, SD-34
- Endorsements:
 - Josh Newman, SPI
 - Young Kim, CD-40
 - Avelino Valencia, SD-34
 - David Penaloza, AD-68

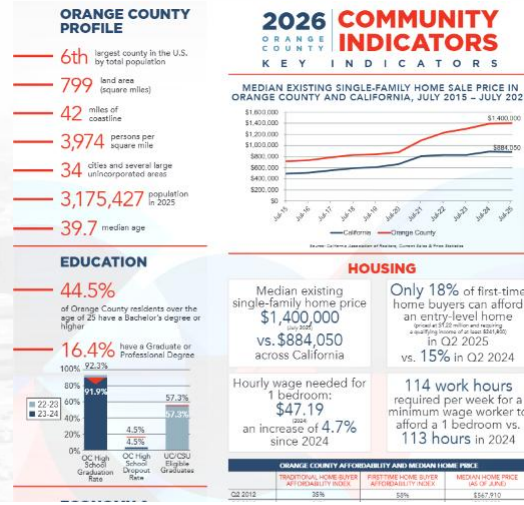
- Unrestricted \$83,219.93
- Restricted \$23,361.33
- Total \$106,581.26

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



Key Updates & Priorities

- JobsFirst Support
- Community Indicators Report
 - Theme being Finalized
 - Sponsorship Growth
 - Release date November, 2026
- Special Research Projects

Events



Key Updates & Priorities

- Annual Dinner & Sac Trip Recap
- Health Care Forum (May 6)
- Save the Dates:
 - Legislative Day (July 21)
 - First Responders (Sept 16)
 - Economic Forecast (Oct 22)
- Full Event Sponsorship Listing Page

Public Affairs

Committee Leadership

- Chair
 - Abigail Lovell
Experian

Key Updates & Priorities

- Expanded Digital Reach
- 2026 Annual Dinner & Board Installation
- Annual Report -> Impact Report
- Media Placement
 - State of the Union
 - Brea Costco Development
- Weekly Insights Growth & Engagement
- OCBC Policy Newsroom Launch

Investor Relations

Committee Leadership

- Chair
 - Eric Morgan
FivePoint Holdings

Key Updates & Priorities

- Q1 2026 Revenue Update
- Receivables Update
- 2026 Strategy for New Business
- Current Prospective Investors

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



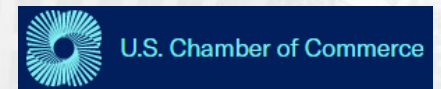
Coalition Partners

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
- U.S. Chamber Meetings

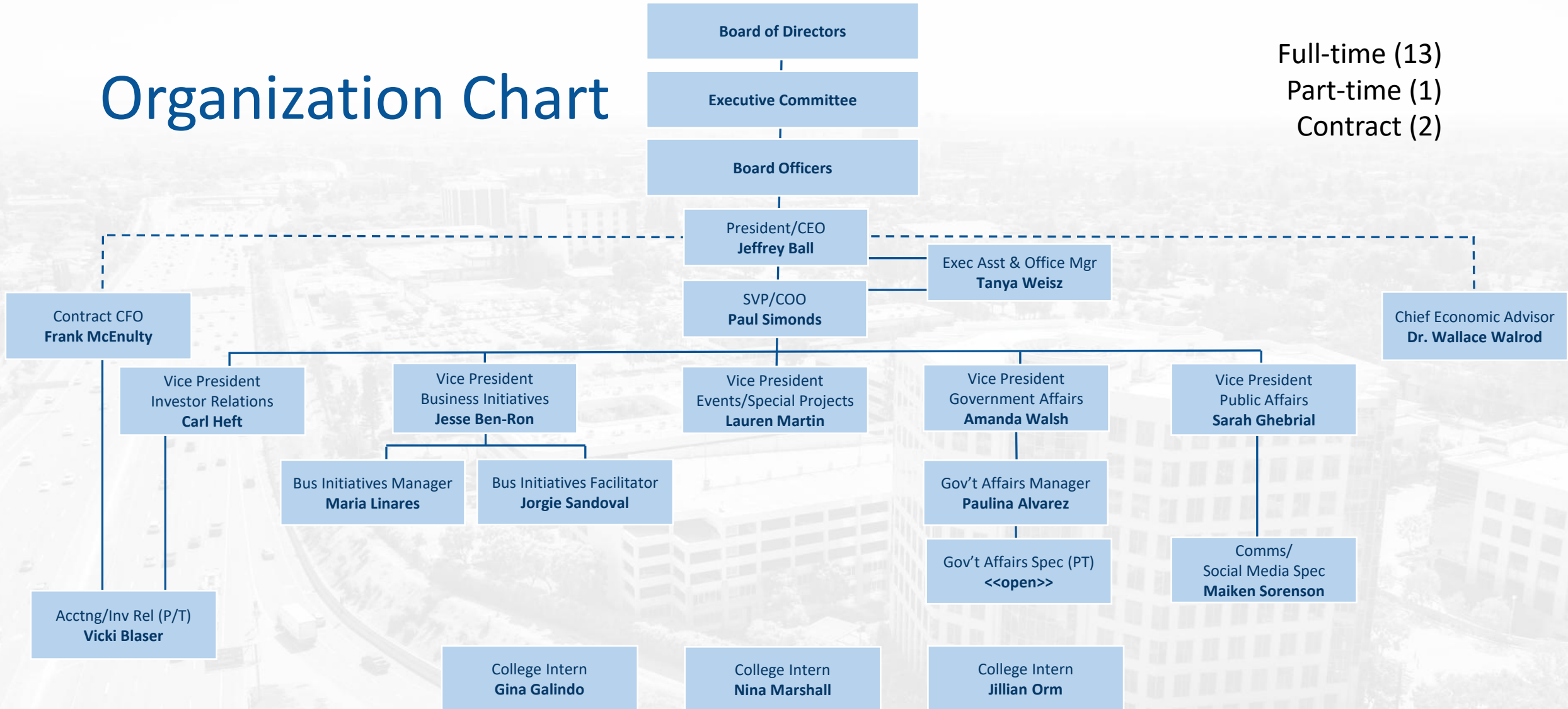


Financial Update

- YTD Financials (through February, 2026) (Exhibits C & D)
 - Investment Revenue is 15% ahead of budget
 - Total Revenue is 5% over budget
 - Expenses are 5% under budget
 - Net Change in Assets is 12% over budget
- Balance Sheet remains strong
 - Strong cash position and no debt
- Financial Audit Update
 - On track to have completed by May Board Meeting

Organization Chart

Full-time (13)
Part-time (1)
Contract (2)



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 status
 - Current Use
 - All invoicing; Business Connections and Committee registration, communication and lists; centralized location to view all active and inactive investors, contacts and prospects; event and meeting surveys
 - Next Steps
 - Held until after website updates – event pages, automated modules like the investor listing page on OCBC website

2026 Priorities

- Investor Growth & Retention
- Industry Cluster Strategy
- CA Legislative Session
- JobsFirst Completion
- AP Business Course Development
- GrowthZone Utilization
- Further Operating Efficiencies
- Rewrite Organizational Bylaws

Thank you
for your
Leadership
&
Support!

