

# 2021 ANNUAL PLAN



**CHARLOTTE**  
REGIONAL BUSINESS  
**ALLIANCE**



## OUR VISION

With **united vision** and **bold action**, we will create the **most vibrant, innovative** and **healthy** economy in the nation.



## OUR MISSION

We enthusiastically collaborate to promote and advance the **Charlotte Region**, creating **opportunity, economic growth, and prosperity for all.**



## OUR PROMISE

**Together**, we are the **voice of business** for the Charlotte Region  
**Together**, we build a **strong economy** where businesses and **people can thrive**  
**Together**, we move forward for all  
**Forward Together**

Dear CLT Alliance Investors, Partners, and Friends,

2020 was an unprecedented year any way you look at it. The Charlotte Region pulled together an incredible response of support, resilience, and new ideas and solutions to overcome challenges facing our community – it's just what we do here. But while we reflect on our collective successes and progress, our work is only beginning.

A year of opportunity is ahead. Covid-19 is no longer a surprise to us, and while we know its effects will still be felt, we're eagerly moving forward. The Charlotte Region remains poised for growth, and we'll work with purpose and a bias toward action to ensure that our growth is regional, sustainable, and equitable.

Our 2021 rallying cry is Forward Together – it anchors our charge of equitable economic growth and the three strategies that will help to get us there:

1. **Accelerate economic revitalization through business growth**
2. **Drive racial equity in the business community**
3. **Launch a Coalition for a Better 2050 and transform the Charlotte Region**

The following pages reflect your input during our fall Leadership Planning Retreat Series, where you affirmed the above strategies and helped outline the unique role of the CLT Alliance. Thank you for shaping this work and ensuring we leverage our collective strength as the Charlotte Region's voice of business and as the connector and convenor for all businesses along the continuum, from entrepreneur to enterprise.

Together, we will make progress and see to it that transformation happens. Thank you for making the commitment to a vibrant, healthy, and innovative economy a priority with us and for your continued engagement and investment in the CLT Alliance. Your unwavering support, even in the most unprecedented times, signals that momentum in the Charlotte Region is unstoppable.

Here's to a brighter and bolder 2021 – Forward Together!



*Carol A. Lovin*

Carol Lovin  
Chairman of the Board



Janet LaBar  
President and CEO



## Amid challenges, we generated notable results

Developed an **integrated COVID-19 response** including **daily/weekly digest** to keep investors apprised; **advocacy for business relief**; research on **economic impacts of pandemic**; **relevant programming** for businesses of all sizes; portal for **PPE supply and demand**

Raised the Charlotte Region's profile, **generating and supporting 66 new projects**, (through November) that represent more than **12,500 jobs** and **\$2.1 billion in investment** in the pipeline

Led the **Vote Yes for Bonds campaign** that succeeded in **winning all three bond referenda** (Streets, Housing, Neighborhoods) on the November 2020 ballot

Engaged **more than 1,000 regional stakeholders** in a **virtual environment** ranging from intimate dialogue and curated conversations to large-scale signature experiences

Facilitated<sup>2</sup> **12 companies** (through November) in relocating/expanding to the Charlotte Region, which will bring **more than 4,600 jobs** and **\$1.2 billion in investment**

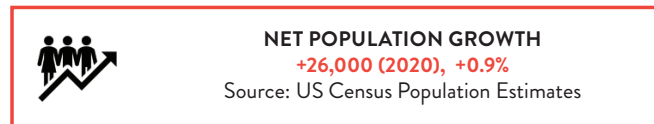
Put Charlotte Region top of mind for site-selectors and corporate real estate execs via **first-ever dedicated, digital news** about expansions, growth, and market activity

<sup>2</sup>Defined as CLT Alliance-generated projects, as well as those where we provided research, consultative, marketing/media, or market connectivity (e.g., peer, HR, or other client-requested) support to the community, states, CLT Alliance investor, or direct to client/project

## Charlotte Region will likely outpace total US; expect modest recovery, inconsistent across industries

### KEY TAKEAWAYS:

- Employment in leisure and hospitality sectors should pick up in 2021, though employment will likely remain under 2019 levels in the Charlotte Region and nationally. While some business and leisure travel will return, confidence levels with large-scale indoor meetings will depend on virus case levels.
- Government payrolls will be affected by loss of sales tax through 2022.
- Migration overall will slow population growth as has been the rule in past recessions. Still, the region will continue to add newcomers, particularly from metro areas in the Northeast.
- The return of supply chains and higher demand for automotive parts will help exports begin to recover in 2021.
- The Charlotte Region's financial and professional services sector – and its technology-based spinoffs – are poised for continued growth.
- Realignment of supply chains for ecommerce and home delivery presents opportunities for last-mile industrial real estate.



### Outperform

| Industry                     | Drivers  |
|------------------------------|--|
| Finance                      | Charlotte could benefit from move away from high-cost markets like New York                  |
| Tech                         | Mobile experience developers are expected to continue expanding; upside for payments/FinTech |
| Warehousing and Distribution | Ecommerce gains will lead to a boom in warehousing opportunities                             |

### Underperform

| Industry                | Drivers   |
|-------------------------|---|
| Transportation          | Air travel will remain constrained through 2021 as employers cut down on business travel  |
| Leisure and Hospitality | While the region will see some small events return, larger-scale travel is unlikely to return to pre-pandemic levels until 2022 |

## Three strategies that focus on the Charlotte Region's most valuable assets—business, people, place



With support and input gathered from investors at our Leadership Planning Retreat series, we're rolling up our sleeves to work on strategies that will advance equitable economic growth for the Charlotte Region.

These strategies leverage our strengths as a convener and connector and most importantly, align with what we do:

- Grow the economy
- Position the region to compete
- Connect through shared purpose and move forward together

# BUSINESS: ACCELERATE ECONOMIC REVITALIZATION THROUGH BUSINESS GROWTH

Both a continuation of Covid-19 cases and the acceleration of vaccine distribution will impact economic recovery, as will a federal-level response to new economic policies. Still, we're poised for growth and will capitalize on a diverse industry set while exploring niche industry opportunities. We play the unique role of marketing the Charlotte Region for business investment, facilitating new business investment, and supporting growth of existing companies.

## CLT ALLIANCE DIFFERENTIATED ROLE

**Build awareness of the Charlotte Region to attract new business**

**Key Initiatives**

- Generate 3.5M media impressions for the Charlotte Region in NY/NJ, Chicago SF, LA, Montreal and Toronto with new regional campaign
- Use website and Select CLT to provide relevant regional information to site selectors, C-Suite decision makers and commercial real estate executives

**Get the Charlotte Region on the short list**

**Key Initiatives**

- Generate 80 new domestic and international projects from high-growth companies considering expansion or relocation
- Support regional partners (e.g., City of Charlotte and 15 counties) as projects narrow within the region – and in our role as connector, convener and voice of business, lead the integration of new companies into the Charlotte Region's business community
- Leverage CLT Alliance international expertise (market intelligence, relationships, foreign policy research) to win more foreign direct investment (FDI) projects
- Continue benchmarking peer metros to better understand and improve our competitive position for business

**Retain and grow existing businesses in the region**

**Key Initiatives**

- Launch a regional Business Retention & Expansion strategy by addressing needs and concerns of businesses operating in the region
- Develop deeper relationships with 15 organizations that support international companies to strengthen our FDI efforts
- Advocate for policies that spur economic revitalization: business reinvestment, clean-slate reform, innovation within higher education, federal stimulus legislation, and comprehensive infrastructure package

## Supported by Investor Input

- Tell our story as one voice for the region, to market to external businesses for recruitment
- Recruit a greater diversity of businesses to the region and create more jobs to reduce unemployment
- Lead initiatives around economic mobility
- Focus on infrastructure and transportation to better connect the region
- Support hospitality and tourism industry, and small businesses for growth and recovery

| Initiative   | Metric                          | Goal       |
|--|---------------------------------|------------|
| Develop and launch a regional campaign   | Launch date/effectiveness       | March 2021 |
| Drive awareness and consideration for Charlotte Region                         | Impressions - Paid & Earned     | 5 million  |
| Leverage website and Select CLT  | Refresh date/# of issues        | June 2021  |
| Proactively identify high growth companies considering expansion or relocation | # of Alliance generate projects | 80         |
| Target cluster report  | Comprehensive report            | April 2021 |
| Regional indicators project  | Dashboard                       | May 2021   |
| Legislative success  | Passed legislation              | 2          |

# PEOPLE: DRIVE RACIAL EQUITY IN THE BUSINESS COMMUNITY

Investing in people is a tried-and-true belief embraced by companies in the Charlotte Region. Whether it's in the form of entrepreneurship, on-the-job training, or leadership development, businesses and employers here support career progression for talent who want to grow and succeed—it's good business. Being intentional with these investments in our racially diverse populations is better business. We play the unique role of tracking progress, being a go-to resource, and connecting dots for more equitable outcomes.

## CLT ALLIANCE DIFFERENTIATED ROLE

Measure inclusion to know that we are changing the outcomes

### Key Initiatives

- Deepen understanding of racial gaps in business ownership and talent within key industries and occupations through qualitative and quantitative research analysis and interviews
- Conduct discovery and inventory of racial equity programs and metrics among employers through Mayor Lyles' Public-Private Partnership for Racial Equity with Charlotte Executive Leadership Council; share best practices with region's business community
- Engage and educate lawmakers on the challenge, the opportunity and solutions to create a more equitable business community

Be the region's go-to for business leaders, employers, and employees

### Key Initiatives

- Convene and create space for racial equity dialogue within Charlotte Region's business community; co-lead with Charlotte Executive Leadership Council and EY Mayor Lyles' Public-Private Partnership for Racial Equity
- Lead vision for long-term competitiveness agenda for Charlotte Region, and provide foundational information to local and state elected officials on importance of equitable economic growth
- Engage employers in hiring from region's higher education institutions and talent resource/workforce development providers to retain our diverse, skilled and educated talent (Foundation)
- Leverage CLT Alliance's business reach to deliver programming that focuses on fortifying the social capital for underrepresented communities (Foundation)

Build regional capacity to scale diverse small businesses

### Key Initiatives

- Map entrepreneurial ecosystem to understand gaps/opportunities for Black and Brown-owned businesses and entrepreneurs of color (Foundation)
- Build on Mayor Lyles' Private-Public Partnership for Racial Equity with Charlotte Executive Leadership Council to connect entrepreneurs with enterprises and increase access to capital, innovation, supplier diversity, social capital, and advisory/consulting support (Foundation)
- Create and strengthen collaborations with immigrant-based organizations to support minority immigrant business community
- Increase number of diverse, growth-oriented, and early stage entrepreneurs through experiential and educational learning to accelerate and scale their business (Foundation)

## Supported by Investor Input

- Use research and metrics to understand and communicate our region's current and aspirational position
- Lead initiatives around economic mobility
- Partner with institutions (e.g., JCSU, CPCC and CMS) to create mentorship opportunities and develop diverse talent
- Advocate for affordable healthcare, housing, and equitable education
- Market the region for diverse companies and talent
- Encourage diverse leadership – lead by example
- Develop and encourage the use of minority suppliers
- Connect small businesses to large corporations to encourage vendor relationships

| Initiative   | Metric   | Goal       |
|--|--|------------|
| Deepen understanding of racial gaps in business ownership and talent within key industries and occupations through quantitative and qualitative research analysis and interviews                                     | Tracking of racial/ethnic disparities in target industries | March 2021 |
| Conduct discovery and inventory of racial equity programs and metrics among employers through Mayor  | # of employers interviewed                                 | 20         |
| Engage and educate lawmakers on the challenge, the opportunity, and solutions to create a more equitable business community  | # of lawmakers educated                                    | 30         |
| Create equitable communications and messaging that represent diverse groups - when working with investors capturing their thoughts and ideas surrounding diversity and inclusion, implementing and highlighting them | % of posts on social platforms                             | 15%        |
| Make sure we have diverse group of investors and leaders within CLT Alliance committees  | % on nominated boards                                      | 30%        |
| Create and strengthen collaborations with immigrant-based organizations to support minority immigrant business community   | # of partnerships created                                  | 10         |
| Increase number of diverse, growth-oriented, and early-stage entrepreneurs through experiential and educational learning to accelerate and scale their business (Foundation)   | # of entrepreneurs   | 10         |

# PLACE: LAUNCH COALITION FOR A BETTER 2050 AND TRANSFORM THE CHARLOTTE REGION

Our region is expected to grow 50% to 4.6M people by 2050. This type of growth will require us to be planful and intentional today so that we can not only maintain but improve the quality of life in the Charlotte Region. Our focus on place will include efforts in transportation, infrastructure, education and innovation. Gathering input from public and private organizations in the region and encouraging collaboration on those truly transformational projects that will create opportunities for all.

## CLT ALLIANCE DIFFERENTIATED ROLE

Advocate for priorities that transform the CLT region by 2050

### Key Initiatives

- Champion CLT Alliance 2021 legislative agenda in DC, Raleigh and Columbia, and create engagement strategy for investors to advocate for regional priorities
- Lead business community support for Charlotte Moves and legislation that provides dedicated, stable, and permanent sources of revenue for state, regional and local public transportation, roadway, bicycle, pedestrian, passenger rail and safety projects
- Expand regional reach of Research Collaborative to drive long-term planning

Study future trends to shape decisions on equitable economic growth

### Key Initiatives

- Drive near/mid/long-term legislative agenda initiatives through data-driven analysis of demographics, population and business growth
- Conduct studies on growth, economic development, business competitiveness, and talent-focused trends to inform decision on place-based investments and wealth-building mechanisms (Foundation)

## Supported by Investor Input

- Convene to create a plan; role of the CLT Alliance is convener. Aggregator, and leader to initiate compelling plans for the community
- Be the leader in advocacy/public policy voice specific to placemaking/transportation
- Make sure the plan has widespread buy-in from the broader community, is communicated to all, and reinforced on an on-going basis
- Support greater transportation connectivity among communities and neighborhoods
- Create a comprehensive strategic plan addressing mobility as supported by government, industry, and community

| Initiative   | Metric                   | Goal   |
|--|--------------------------|--|
| Champion CLT Alliance 2021 legislative agenda in DC, Raleigh, and Columbia, and create engagement strategy for investors to advocate for regional priorities   | Legislative Success      | 80%  |
| Expanding regional reach of the Research Collaborative to drive long-term planning   | # of annual meetings     | 6  |
| Lead business community support for Charlotte Moves and legislation that provides dedicated, stable, and permanent sources of revenues for State, regional and local public transportation, roadway, bicycle, pedestrian, passenger rail and safety projects | Lead and launch campaign | Sufficient funding raised for effective delivery of a campaign that garners favorable public support |
| Drive near/mid/long-term legislative agenda initiatives through data-driven analysis of demographics, population and business growth.  | # of policy initiatives  | 2  |
| Conduct studies on growth, economic development, business competitiveness, and talent-focused trends to inform decisions on place-based investments and wealth-building mechanisms (Foundation)  | # of studies             | 1-2  |

# 2021 ANNUAL PLAN METRICS

| METRIC  | THRESHOLD  | TARGET | STRETCH | 2020 RESULT |
|---|--|--------|---------|-------------|
| <b>BUSINESS: Accelerate Economic Revitalization</b>   |  |        |         |             |
| <b>PAID AND EARNED MEDIA IMPRESSIONS</b><br>Generate awareness of Charlotte Region nationally and internationally across print and digital platforms  | 3.5M   | 5M     | 7M      | New         |
| <b>NEW QUALIFIED PROJECTS</b><br>Proactively identify and generate leads of high-growth companies considering expansion or relocation   | 65   | 80     | 90      | 42          |
| <b>BENCHMARKING</b><br>Report on region's target clusters and business and economic indicators  | --   | --     | --      | New         |
| <b>LEGISLATIVE SUCCESS</b><br>Advocate for policies that spur economic revitalization   | 1  | 2      | 3       | 4           |
| <b>PEOPLE: Drive racial equity in the business community</b>  |  |        |         |             |
| <b>CONVENE &amp; CREATE OPPORTUNITIES FOR SOLUTIONS</b><br>Convene and create space for racial equity dialogue within Charlotte Region's business community; co-lead with CELC and EY Mayor Lyles' public-private partnership for racial equity   | 4  | 5      | 6       | New         |
| <b>SHARE BEST PRACTICES</b><br>Conduct discovery and inventory of racial equity programs and metrics among employers  | 15   | 20     | 25      | New         |
| <b>DRIVE POLICY ACTION</b><br>Engage and educate lawmakers on the challenge, the opportunity, and solutions to create a more equitable business community   | 20   | 30     | 40      | New         |
| <b>SCALE DIVERSE SMALL BUSINESS</b><br>Increase number of diverse, growth-oriented, and early-stage entrepreneurs through experiential and educational learning to accelerate and scale their business  | 5  | 10     | 15      | New         |
| <b>PLACE: Launch Coalition for a Better 2050 and Transform the Charlotte Region</b>   |  |        |         |             |
| <b>LEGISLATIVE SUCCESS</b><br>Champion legislative agenda in DC, Raleigh, and Columbia  | 75%  | 80%    | 90%     | New         |
| <b>CONVENING A REGIONAL VOICE</b><br>Expanding regional reach of the Research Collaborative to drive long-term planning   | 6  | 8      | 10      | New         |
| <b>LEAD AND LAUNCH CAMPAIGN</b><br>Lead business community support for Charlotte Moves and legislation that provides dedicated, stable, and permanent sources of revenues for state, regional, and local public transportation, roadway, bicycle, pedestrian, passenger rail, and safety projects | Sufficient funding raised for effective delivery of a campaign that garners favorable public support |        |         | New         |

# 2021 BUDGET

\$US 000s

## REVENUE

Dues Revenue  
Other Revenue  
Foundation  
Project Revenue

## TOTAL REVENUE

## EXPENSES

Property and Building  
Personnel  
General & Operating  
Project Expense  
Foundation Expense

## TOTAL EXPENSES

## NET RESULT

|                       | 2020 Forecast  | 2021 Budget  | Variance \$  | 2021/20 %   |
|-----------------------|----------------|--------------|--------------|-------------|
| <b>REVENUE</b>        |                |              |              |             |
| Dues Revenue          | 3,278          | 5,931        | 2,653        | 80.9        |
| Other Revenue         | 354            | 54           | (300)        | (84.7)      |
| Foundation            | 69             | 497          | 428          | 620.3       |
| Project Revenue       | 2,405          | 2,327        | (78)         | (3.2)       |
| <b>TOTAL REVENUE</b>  | <b>6,106</b>   | <b>8,809</b> | <b>2,703</b> | <b>44.3</b> |
| <b>EXPENSES</b>       |                |              |              |             |
| Property and Building | 1,006          | 931          | (75)         | (7.5)       |
| Personnel             | 4,607          | 4,666        | 59           | 1.3         |
| General & Operating   | 714            | 757          | 43           | 6.0         |
| Project Expense       | 1,120          | 2,109        | 989          | 88.3        |
| Foundation Expense    | 41             | 334          | 303          | 739.0       |
| <b>TOTAL EXPENSES</b> | <b>7,488</b>   | <b>8,807</b> | <b>1,319</b> | <b>17.6</b> |
| <b>NET RESULT</b>     | <b>(1,382)</b> | <b>2</b>     | <b>1,384</b> |             |



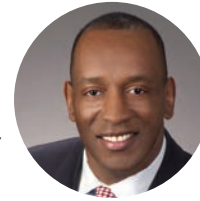
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