

CELEBRATING



PLANO CHAMBER OF COMMERCE



SCAN ME

AGENDA

- 8:00 AM: Welcome by Board Chair Kristen Lollar and Chair Elect Amanda Rockow
Structured Introductions by Charmaine Solomon
- 8:30 AM: Board Overview & 80th Anniversary Preview by Kelle Marsalis
- 9:15 AM: Board Photo & Break
- 9:45 AM: 2026 Planning & Goal Setting Session
- 11:30 AM: Wrap Up



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PLANO CHAMBER OF COMMERCE



AMANDA ROCKOW
UT DALLAS
2026 PLANO CHAMBER BOARD CHAIR

KRISTEN LOLLAR
WHITLEY PENN
2025 PLANO CHAMBER BOARD CHAIR

PROFESSIONAL STAFF



Kelle Marsalis
President/CEO



Jennifer Ruhman
Director of Finance



Ryan Minter
Director of Engagement



LaChaya Terry
Director of Comm's
& Marketing



Jenny Avis
Director of Investor Relations



Leah White
Foundation Director



Krystal Kunz
Engagement Manager



Jillian Hiris
Membership Specialist



Judy Webster
Business Center
Coordinator



Namrata Sood
Special Projects
Coordinator



Charmaine Solomon
Director of Leadership
Plano



Kelly Fanelli
Membership Consultant

LEADERSHIP EXPECTATIONS



- Board members must be a **member in good standing**
- Board members will **serve on a committee** or designate a representative to serve as needed
- Board members' companies will **invest in the Chamber**
- A board member will **recruit 2 new members** annually
- Board membership will **encourage diversity** and be reflective of the Plano business community
- A board member will **not miss 3 consecutive meetings**
- A board member should make a **personal or company contribution** to the Chamber's Plano Works Leadership Foundation



850 MEMBERS

165,000 EMPLOYEES

28 BOARD MEMBERS

11 PROFESSIONAL STAFF

BUDGET: \$1.6 MILLION

★★★★★ ACCREDITED

2018 CHAMBER OF THE YEAR (ACCE)



2026 Board of Directors and Leadership

OFFICERS

2026 CHAIR OF THE BOARD
2027 CHAIR – ELECT
IMM. PAST CHAIR
VICE-CHAIR
SECRETARY
TREASURER
AT-LARGE
PUBLIC POLICY CHAIR
PRESIDENT & CEO

AMANDA ROCKOW | UT DALLAS
RUSSEL DUBREE | PERFORMANCE FACTION
KRISTEN LOLLAR | WHITLEY PENN
RUSS BURCH | FROST BANK
VINCENT ALLEN | CARSTEN, ALLEN & GOURLEY
JOSH KETTLER | ARMANINO
DENISE RODEWALD-BATES | CHILDREN'S HEALTH
PAUL HERNANDEZ | ONCOR
KELLE MARSALIS | PLANO CHAMBER

STAFF

FINANCE DIRECTOR
MARKETING DIRECTOR
ENGAGEMENT DIRECTOR
DEVELOPMENT DIRECTOR
FOUNDATION DIRECTOR
ENGAGEMENT MANAGER
DEVELOPMENT MANAGER
BUSINESS CTR COORDINATOR
PROJECT COORDINATOR

JENNIFER RUHMAN | JENNIFERR@PLANOCHAMBER.ORG
LACHAYA TERRY | LACHAYAT@PLANOCHAMBER.ORG
RYAN MINTER | RYANM@PLANOCHAMBER.ORG
JENNY AVIS | JENNYA@PLANOCHAMBER.ORG
LEAH WHITE | LEAHW@PLANOCHAMBER.ORG
KRYSTAL KUNZ | KRYSTALK@PLANOCHAMBER.ORG
JILLIAN HIRIS | JILLIANH@PLANOCHAMBER.ORG
JUDY WEBSTER | JUDYW@PLANOCHAMBER.ORG
NAMRATA SOOD | NAMRATAS@PLANOCHAMBER.ORG

DIRECTORS

DIONE BEILGARD | BERKSHIRE HATHAWAY REALTY
CLAIRE BOWEN | YPP CHAIR (CHILDREN'S HEALTH)
SHARON BRADLEY | LP CHAIR (RESTORATIVE FLO)
CATHERINE BYWATERS | THR PRESBYTERIAN PLANO
BEN COOGAN | MEDICAL CITY PLANO
KELBI CULWELL | THE BOEING COMPANY
ERIC DANIELSON | NEXPOINT
DEANNA EASLEY | LIFEPAH SYSTEMS
JULISSA ESTRADA | THE LOCAL GOOD COLLECTIVE
TIFFANY FERRIS | HAYNES BOONE, LLP
KATIE HERTEL | OLSSON
MISTY HOYT | PHOTOGRAPHY BY MISTY
CANDICE LOTT | AMERICAN HEART ASSOCIATION
ASSIA MAHMOOD | WD CHAIR (WINDHAVEN ACADEMY)
MANISH MANGAL | TECH MAHINDRA
GRAHAM PERRY | JPMORGAN CHASE
JOLENE RISCH | RISCH RESULTS
KELSEL THOMPSON | PAUL QUINN COLLEGE
CHRISTOPHER WALKER | FRITO-LAY
PAMELA ZIEGLER-PETTY | PZP BIZCONNECT



Advisory & Key Partners

COMMUNITY PARTNERS & FORMER CHAIRS

PARTNER	GRACIELA KATZER PLANO INTERNATIONAL FESTIVAL
PARTNER	DR. THERESA WILLIAMS PLANO ISD
PARTNER	SHAWN WHITLOCK COLLIN CO BLACK CHAMBER
PARTNER	MONICA SHORTINO CCBA
2024 CHAIR OF THE BOARD	DAVID DOWNS DOWNS FISCHER FINANCIAL
2022 CHAIR OF THE BOARD	EMILY ZOOG HUNTINGTON BANK
2023 CHAIR OF THE BOARD	MICHAEL LAWSON THE BOEING COMPANY
2018 CHAIR OF THE BOARD	JEFF BECKLEY BECKLEY & ASSOCIATES PLLC



ADVISORY DIRECTORS

EX-OFFICIO	GARRY EVANS COLLIN COLLEGE
EX-OFFICIO	MARK ISRAELSON CITY OF PLANO
EX-OFFICIO	DOUG MCDONALD CITY OF PLANO



CONTRACT STAFF

LEADERSHIP PLANO DIRECTOR	CHARMAINE SOLOMON LEADERSHIPPLANO@PLANOCHAMBER.ORG
DEVELOPMENT CONSULTANT	KELLY FANELLI KELLYF@PLANOCHAMBER.ORG
ADVOCACY CONSULTANT/LOBBYIST	TBD TBD



U.S. Chamber of Commerce

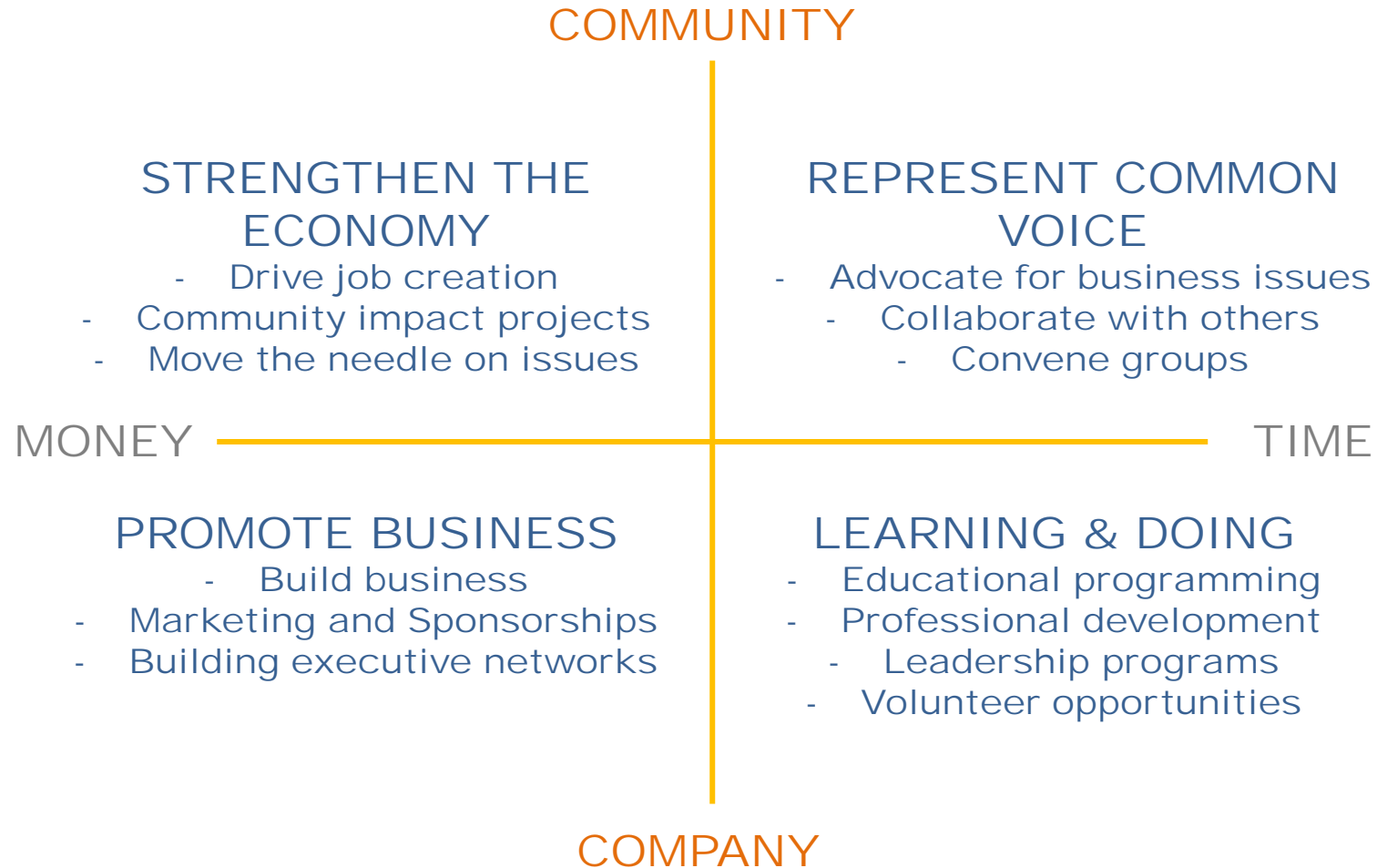


ASSOCIATION OF CHAMBER OF COMMERCE EXECUTIVES



WHAT DOES A CHAMBER DO?

HOW DO MEMBERS ENGAGE?





Chamber Membership = Access and Information

Your membership in **The Plano Chamber** supports our goals to be a resource for area businesses and organizations of all sizes, and to amplify the business voice as we seek to foster a healthy business climate.

- Bring the tools, resources and connections you need to grow your business today and prepare you for tomorrow
- Networking + professional development
- Support local and state business advocacy
- Exclusive access to high-quality programming, events and officials.



Plano Works Foundation Investment = Community Impact

An investment in the **Plano Works Foundation Fund, a 501(c)3**, **significantly** elevates The Plano Chamber's ability to proactively address opportunities and challenges impacting our business community by directly funding key initiatives related to:

- Strengthening coordination and collaboration among private and public sector leaders on community advancement issues
- Talent and workforce development
- Supporting women, minority, and veteran owned companies

2025-2026 PLANO CHAMBER STRATEGIC PLAN OF WORK



WHAT IS THE MEMBER EXPERIENCE?

- ❖ Advocacy & IMPACT
- ❖ Talent, Workforce & Leadership
- ❖ Business Growth
- ❖ Telling the Plano Story

ADVOCACY

Champion pro-business policy, civic engagement and informed participation

- Foster relationships with public officials
- Advocate for pro-business policy
- Encourage civic participation and leadership
- Increase voter engagement

TALENT

Strengthen the regional talent pipeline and elevate community leadership

- Build a coordinated Talent Pipeline
- Expand career awareness, work-based learning and youth development
- Grow upskilling, reskilling and adult talent advancement
- Advocate for education & workforce excellence
- Deliver leadership development programs

GROWTH

Drive economic vitality through business support, engagement and connection

- Provide relevant and accessible learning to build business growth
- Deliver excellent customer service & experiences
- Strengthen business connections
- Promote member success

STORYTELLING

Amplify Plano's identity, strengths and leadership on local, regional and national stages

- Build a unified "Plano Story"
- Launch multi-channel storytelling campaigns
- Position Plano as THE regional thought leader
- Build community consensus through experience



#CollinCountyVotes

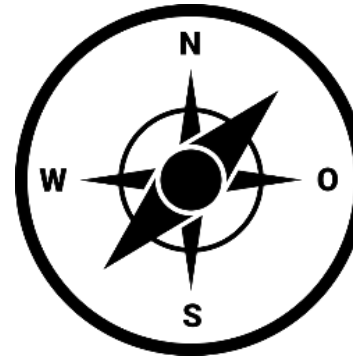




Your responsibility as a Board Member

What you DO as a board member.... **Navigate (governance)**

- Establish policies and priorities and monitor for effectiveness
- Approve legislative priorities
- Approve the budget
- Hire and/or evaluate the President & CEO (led by Board Chair)
- Exert your influence with the Board for approval of actions
- Represent the membership
- Advise the staff when asked by the CEO
- Support and understand the strategic plan



What you do NOT DO as a board member.... **Drive (management)**

- Get involved in personnel decisions outside of the CEO
- Dictate specific procedures and programming
- Function in an administrative role
- Make decisions or speak on behalf of the Chamber outside our stated policies and positions
- Commit the Chamber to a financial responsibility



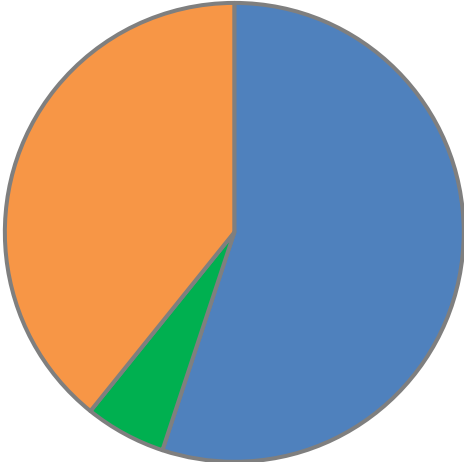
FINANCIAL OVERVIEW

The Plano Chamber of Commerce and Plano Works Leadership Foundation has a combined revenue of approximately **\$1.5M** annually and strives to maintain a balanced budget. The financial statements of the PCOC are reviewed and approved by the Finance Committee and reported to the Board of Directors.

The PCOC has NET ASSETS of approximately **\$1.2M** that provide financial liquidity and a safety net for extraordinary items. It is the Chambers policy to maintain **3 months** of operating revenue in cash operating accounts. All financial policies are available to Board Members and are reviewed annually by the Finance Committee.

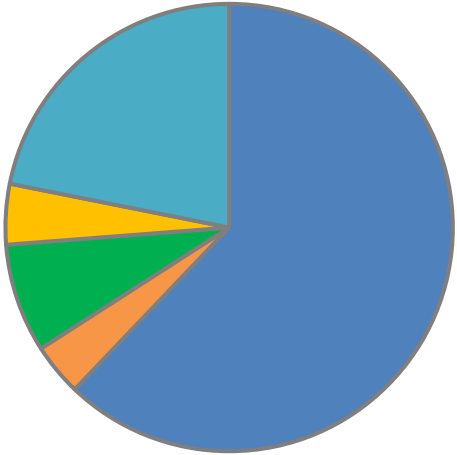
OPERATING BUDGET

Operating Income



■ Dues ■ Non-Dues ■ Programs & Events

Operating Expense



■ Administrative ■ Facilities
■ Operations ■ Membership
■ Programs & Events

QUESTIONS?



SCAN ME

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PLANO CHAMBER OF COMMERCE



80 YEARS OF IMPACT IN PLANO AND BEYOND

- **80 years of impact:** Economic growth, leadership development, business advocacy.
- **Community pride:** Chance to honor the Chamber's role in Plano's success story.
- **Future focus:** Positioning the Chamber as a continued leader for the next 80 years.

CELEBRATING 80 YEARS

PLANO CHAMBER

OF COMMERCE

1946-2026

ANNIVERSARY ROLLOUT

- Theme: **Honoring the Past, Leading Forward.**
- 80th anniversary logo launch: January 2026
- Integration into events, marketing, and sponsorships
- Special branding across collateral

CELEBRATING



PLANO CHAMBER OF COMMERCE

MEMBER RECOGNITION

ANNIVERSARY BRANDING & BACKDROPS

MERCHANDISE & COLLATERAL

PROGRAM & EVENTS

STORYTELLING & MEDIA

CELEBRATING



PLANO CHAMBER OF COMMERCE

CELEBRATING



SPONSORSHIP OPPORTUNITIES

- **Presenting Sponsor:** year-long branding across all 80th materials
- **Event-specific sponsorships:** Annual Meeting, Luncheon, Golf, BOP
- **Marketing sponsorships:** backdrops, signage, merchandise, podcast/video series
- **Visibility:** recognition in press release, website, email, social, event programs

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ADVOCACY

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Amplify Plano's identity, strengths and leadership on local, regional and national stages

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2025-2026

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ACTIVITIES

- Monthly / Weekly news updates on issues
- Monthly Public Policy Committee meetings
- Special committees on key issues like infrastructure
- Austin & DC Fly-ins
- Foster relationships with public officials
 - Develop relationships with elected delegations at the local, state and federal levels
 - Provide members access to elected officials
- Advocate for pro-business policy
 - Create and develop priorities for state sessions
 - Consider positions on local and federal issues
 - Represent business community during challenging policy questions and share information about issues
- Encourage civic participation and leadership
 - Candidate Schools
 - Explore creation of Center for Civic Engagement
- Increase voter engagement
 - Election notifications, ballot tools & voting resources
 - Access to candidates

2025-2026

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TALENT

Strengthen the regional talent pipeline and elevate community leadership

ACTIVITIES

- Talent Advancement Network meetings and gatherings
- Talent Advancement Network website tools
- Regular e-news and updates
- Job seeker data collection to share with employers
- Workforce/Skills Summit
- Build a coordinated Talent Pipeline
 - Initiate TAN community to centralize efforts in Talent & WF
 - Create TAN Website
 - Co-sponsor Jobs for the Future report focusing on Collin County to identify key industry gaps, then create sector-based employee councils to provide pathways to fill gaps through partnership and tools
- Expand career awareness, work-based learning and youth development
 - Build internship experience (college) and partner with City
 - Partner with PISD on career explorer and industry days
 - Train employers to onboard and mentor young workers
 - Create digital pathways portal, highlighting local job clusters, wages and training routes

2025-2026

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- Regular e-news and updates
- Job seeker data collection to share with employers
- Workforce/Skills Summit
- Grow upskilling, reskilling and adult talent advancement
 - Develop micro-credentials, badges and partner on short-term training offerings with partners
 - Host annual “Skills Summit” for employers, educators and workforce agencies
 - Convene trainings for small business owners and employees to align skills
- Advocate for education & workforce excellence
 - Promote pro-business education partnerships
 - Use Chamber’s policy platform to advocate for long-term talent competitiveness
 - Leverage data to inform city, state and federal policy makers
- Deliver leadership development programs
 - Leadership Plano, YPP, Women’s Division
 - Propel, Next Gen Leadership

2025-2026

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GROWTH

Drive economic vitality through business support, engagement and connection

ACTIVITIES

- Chamber Champions
- Networking events
- Content expert access
- Small Business Initiative
- Business tools, resources and key partnerships
- Provide relevant and accessible learning to build business growth
 - Small business learning opportunities
 - Networking and community building events
 - Access to information via web tools and social media channels
- Deliver excellent customer service & experiences
 - Prosperity Business Center
 - Innovative and informative event opportunities
 - Trending business topics
- Strengthen business connections
 - Member to member vendor opportunities
 - Leads generation, office hours
- Promote member success
 - Sponsorship opportunities, branding tools, company recognitions, provide partnership access

2025-2026 PLANO CHAMBER STRATEGIC PLAN OF WORK



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STORYTELLING

Amplify Plano's identity, strengths and leadership on local, regional and national stages

ACTIVITIES

- Weekly newsletter & content sharing
- Enhanced social channels and member promotions
- Innovative website tools
 - Partnerships
- Branding, promotions and company profiles
- Build a unified "Plano Story"
 - Create core story pillars
 - Create a digital story toolkit for partners that includes logos, fact-sheets, talking points, data, etc...
 - Create short-form story-telling videos featuring CEOs, small business owners, rising talent and civic leaders
 - Create a data-backed "state of Plano" fact sheet
- Launch multi-channel storytelling campaigns
 - 80th Anniversary Campaign
 - Monthly profiles and social campaigns
 - Elevate profile of podcast
 - Chamber-produced micro-docs on Plano legacy companies, new investments and revitalization... "why Plano is different"

2025-2026

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ACTIVITIES

- Weekly newsletter & content sharing
- Enhanced social channels and member promotions
- Innovative website tools
 - Partnerships
- Branding, promotions and company profiles
- Position Plano as THE regional thought leader
 - Public data-backed reports
 - Host signature thought-leadership programs like State of AI, Policy Forums, etc...
 - Elevate Chamber staff and volunteer leadership (YOU) in regional media as experts in business, workforce and economic topics
 - Lead programs like Collin County Days and the 80th Celebration to showcase Plano's strength isn't going anywhere
- Build community consensus through experience
 - Create branded merch and digital badges for companies and community groups to use
 - Launch community storytelling challenge
 - Host immersive pop-up events, workplace tours and spotlights on specific sectors
 - Develop 80th Anniversary digital timeline of defining Plano moments to highlight as year progresses

PLANNING SESSION

CREATING A SHARED DEFINITION OF SUCCESS FOR 2026

ACTIVITY 1 (15 MINUTES): The “Year in Headlines”

Imagine it is December 2026 and local media, business leaders and regional partners are praising the Plano Chamber. Write a headline that captures our biggest accomplishment.

Examples:

- “Plano Chamber’s Talent Advancement Network becomes blueprint for North Texas workforce strategy.”
- “Plano Chamber celebrates 80 years of business leadership with record membership growth.”

PLANNING SESSION

CREATING A SHARED DEFINITION OF SUCCESS FOR 2026

ACTIVITY 2 (45 MINUTES): Success Indicators Gallery

In groups, discuss and identify success indicators in each of our four strategic program of work areas. Table facilitators will ask key questions on worksheets to help narrow down indicators.

Output GOAL:

- Reach Indicator (aspirational)
- Essential Indicator (must-have)
- Quick Wins (early 2026 momentum)

Community Impact & Advocacy

What specific policy wins, access points or influence should be visible?

How should members be able to describe our role in legislative clarity and pro-business advocacy?

What defines successful election engagement this year?

Talent, Workforce & Leadership

What measurable progress should exist in the regional talent pipeline?

What outputs should TAN produce?

What must Leadership Plano achieve to strengthen the leadership bench?

What measurables can YPP, Propel or Women's Division achieve?

Growth & Member Experience

What improvements in member experience need to be tangible?

What should member companies say about the Chamber's support and value?

How should learning, networking and retention evolve?

What is one new innovative idea the Chamber could consider as a member service?

Telling the Plano Story

What elements of the unified Plano narrative must be launched by year-end?

How much visibility should Plano have regionally?

What storytelling assets must be used by partners?

PLANNING SESSION

CREATING A SHARED DEFINITION OF SUCCESS FOR 2026

ACTIVITY 3 (15 MINUTES): Baseline – 2026 Goals & Success Indicators Report

Each group will report on their most exciting ideas and goals. Themes and consensus will begin to emerge. The information shared (and collected at each table) will be given to staff to create the Goals & Success Indicators Report Card to be shared at the January Board meeting.

QUESTIONS?

CELEBRATING



PLANO CHAMBER OF COMMERCE



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