

TOGETHER, WITH OUR BUSINESS LEADERS AND COMMUNITY PARTNERS, WE WILL HELP LEAD THE DALLAS REGION TO BECOME THE BEST PLACE IN THE UNITED STATES TO LIVE, WORK, AND DO BUSINESS.



A FEW THOUGHTS FROM OUR CEO

It's hard to believe we are entering the final year of our 5-year strategic plan, "Building Tomorrow Together," which was developed in consultation with more than 60 CEOs and executives, along with the Dallas Regional Chamber leadership team. Working with our Board and Boston Consulting Group, our goal back in 2015 was to determine how to build on the successes our region had experienced, and to better understand the business community's core challenges and opportunities. Upon reflection, our accomplishments, with the help of many great partners, have far surpassed anything we could have imagined.

The Dallas Region has added more than 1 million new residents since 2010, growth fueled by the addition of more than 130 corporate headquarters, hundreds of local company expansions, and the creation of more than 800,000 new jobs. Simply put, we're a job creating machine, the top U.S. metro for job growth in 2018. We are now a region of more than 7.5 million people — and we're projected to surpass 10 million in the next 20 years. We are now home to 24 Fortune 500 headquarters, and we're the only region in the country that can claim three Fortune 10 headquarters (AT&T, ExxonMobil, McKesson).

We understand that with this growth comes the responsibility to make sure we have a workforce prepared for the jobs of tomorrow. That's why we work hard every day to strengthen our talent pipeline of homegrown students and workers by improving our education system. We work especially closely with the Dallas Independent School District, now nationally recognized for its remarkable improvements.

Another important way to strengthen the workforce is by helping attract the best and brightest workers from across Texas, the United States, and the world, while retaining the talent already studying and working here. Through our Say Yes to Dallas initiative, more highly skilled workers know about the great quality of life we enjoy here, and that the Dallas Region is a great place for career advancement, as well as a great place to live and raise a family. We've been dubbed a "millennial magnet," having grown our population of adults ages 20-34 more than any other U.S. city in 2017, the most recent year of available statistics.

Underlining all our other core priorities is our tireless work in public policy, which impacts everything we do. Specifically, we focus on ways to strategically manage our region's growth by working on issues such as our need for more roads, renewable water sources, and better infrastructure. As our region continues to expand and prosper, it's important that we keep our pro-business, pro-growth environment healthy, strong, and open for all.

The Dallas Region has become a shining example to the country for business opportunities, corporate relocations, and job growth. What a place to be, and what a time to be here! The DRC plays a key role in keeping this momentum going, and we could not do any of it without your support. Thank you.

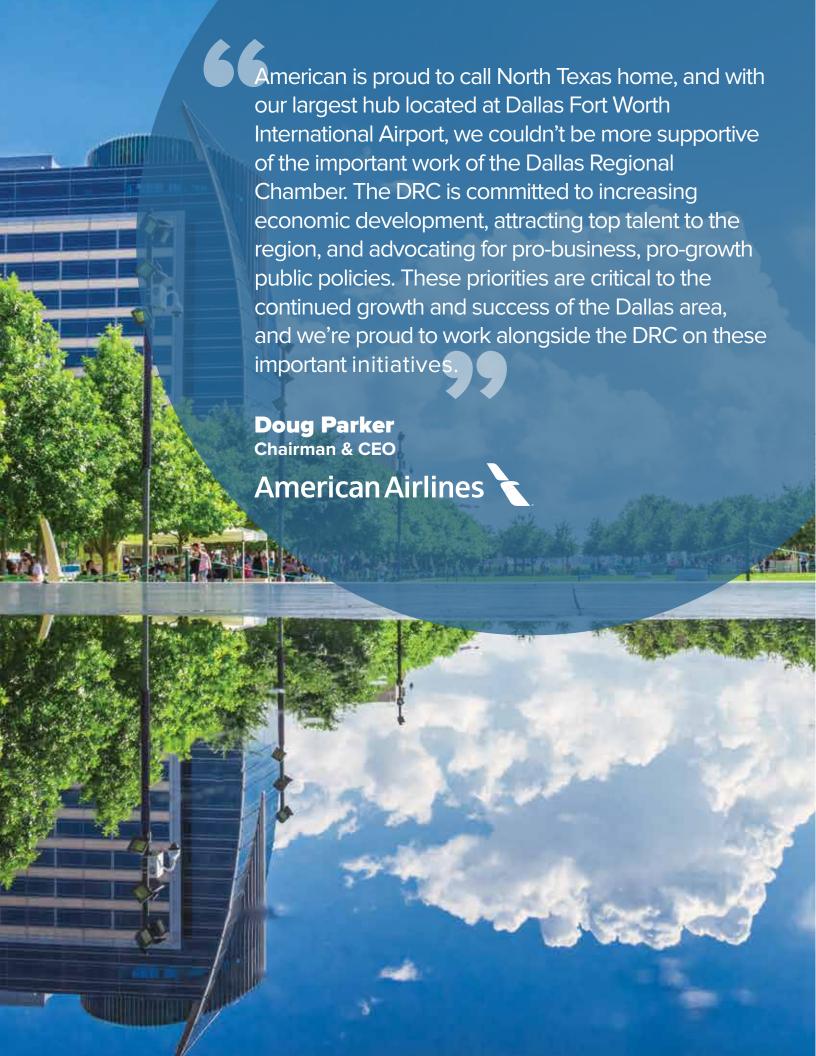
Work on our next strategic plan is already underway, and we intend to unveil it to you at our 2021 Annual Meeting. Thank you for joining us as we continue to work to make the Dallas Region the best place in the United States to live, work, and do business.



All best wishes.

Dale Petroskey
President & CEO

Dallas Regional Chamber



2020 CHAIR OF THE BOARD

John Olajide is Founder and CEO of Axxess, the leading home health care technology company in North America. In this role, he leads the strategic vision and direction of the company, and oversees more than 300 employees at Axxess' headquarters in Dallas and other locations throughout the U.S. He is passionate about improving the quality of health care services delivered to patients in their homes by empowering health care organizations with state-of-the-art software solutions.

Since John founded Axxess as a consulting firm in 2007, Axxess has grown rapidly, and today more than 7,000 organizations serving more than 2 million patients have used Axxess software and services to make care in the home easy and make lives better.

John's vision for Axxess began while earning a degree in telecommunications engineering from The University of Texas at Dallas. After graduating in 2004, he founded Axxess and worked with colleagues to create The Axxess Way, a concise, living document detailing a standard for maintaining a collaborative, transparent work environment focused on constant innovation that enables people to succeed. This daily commitment to maintaining an inclusive culture has led Axxess to win numerous awards nationally for being a "Best Place to Work."

In addition, giving back to the community and supporting humanitarian efforts is a foundational value John has instilled at Axxess. Through Axxess' corporate citizenship efforts, numerous Dallas organizations have benefited, including Dallas ISD's Kennedy-Curry Middle School, Cristo Rey Dallas College Prep, Boys & Girls Clubs of Greater Dallas, The University of Texas at Dallas, Texas Women's Foundation, Pat and Emmitt Smith Charities, Business Council for the Arts, Minnie's Food Pantry, The Senior Source, and the Visiting Nurses Association of Texas, among others.

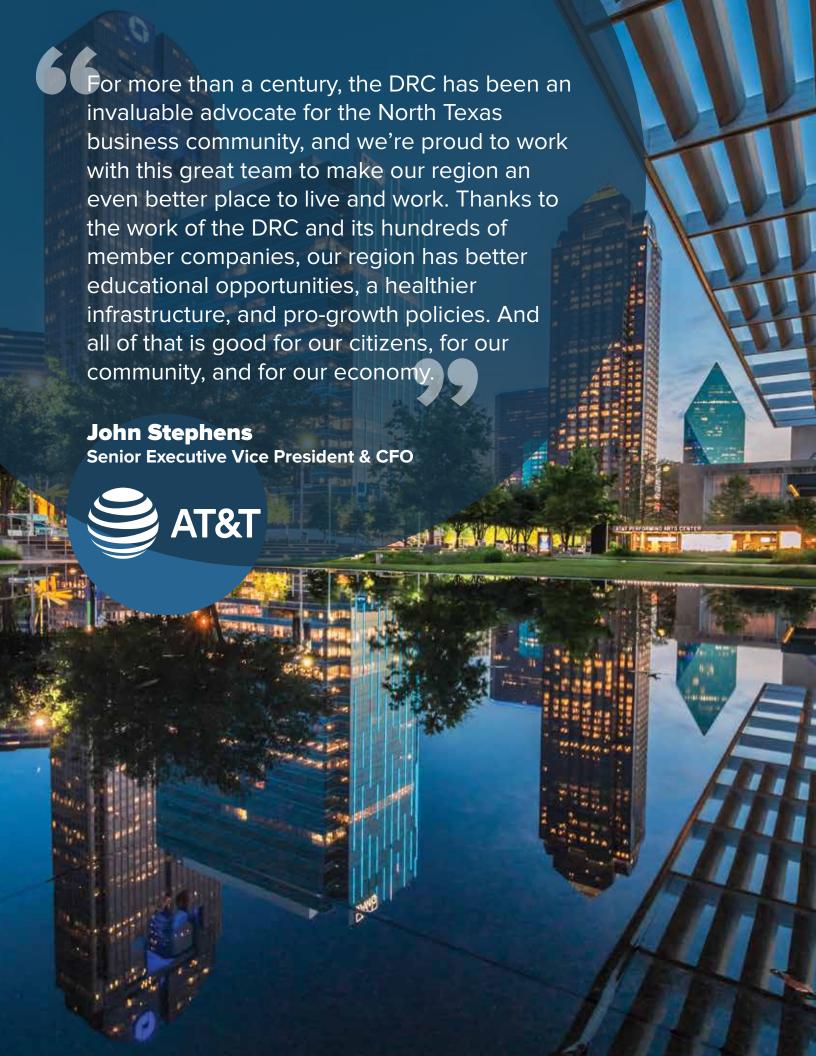
In October 2019, Axxess announced the largest-ever scholarship endowment program for computer science and engineering students at The University of Texas at Dallas. John was recently named 2019 Humanitarian of the Year by Grace for Impact, an international nonprofit organization focused on providing access to high-quality health care.

In 2015, John became the youngest person ever honored as a Distinguished Alumnus by The University of Texas at Dallas, and in 2018 was named to the school's executive board. In addition to other civic and community boards, John is the 2020 Chair of the Dallas Regional Chamber's Board of Directors and Executive Committee, and has chaired its Innovation and Capital Task Force. He also sits on the board of the Dallas Entrepreneur Center.

John Olajide President & CEO

Axxess

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GET CONNECTED

- ECONOMIC DEVELOPMENT www.dallaschamber.org/ecodev
- TALENT ATTRACTION www.dallaschamber.org/talentattraction
- EDUCATION & WORKFORCE www.dallaschamber.org/education
- PUBLIC POLICY www.dallaschamber.org/publicpolicy
- LEADERSHIP PROGRAMS www.dallaschamber.org/leadership
- MEMBERSHIP www.dallaschamber.org/membership
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STAY CONNECTED





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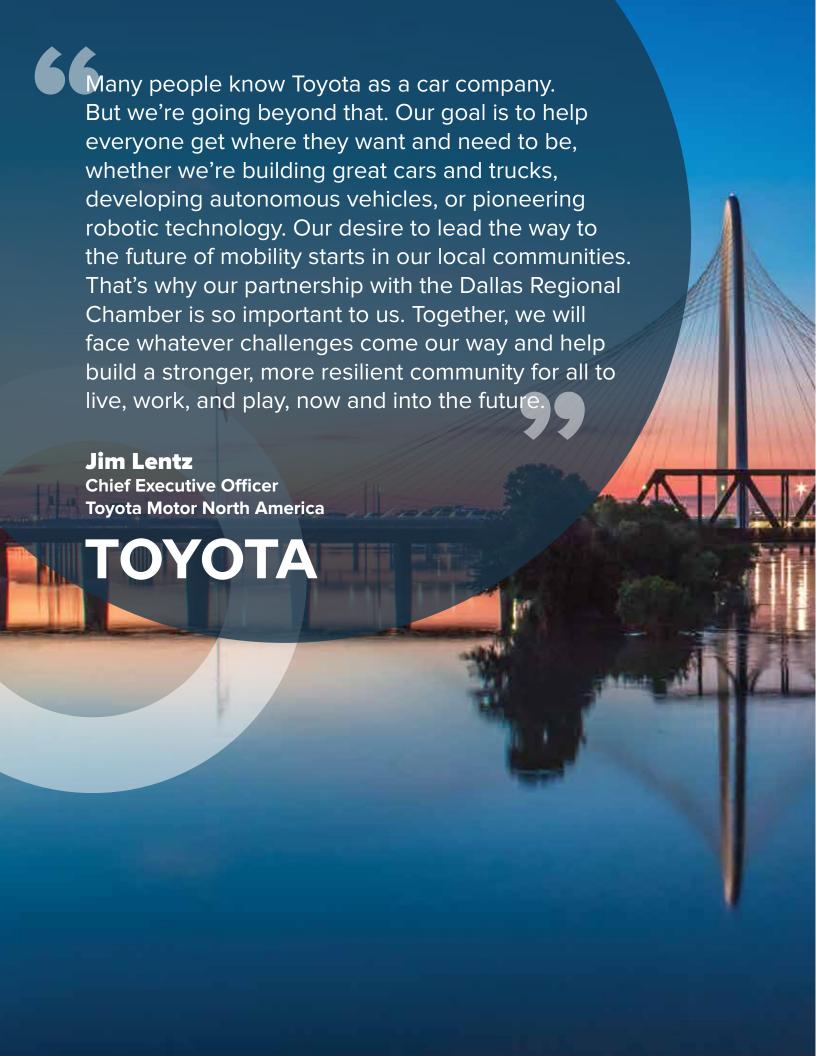


Dallas Regional Chamber



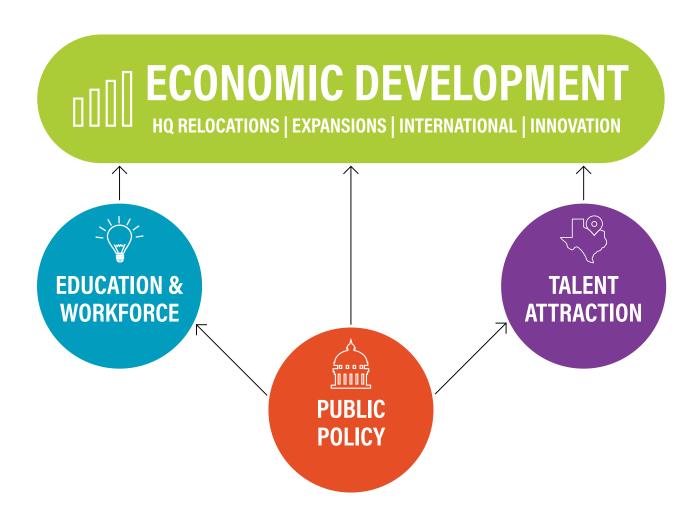
@dallasregionalchamber





OUR STRATEGIC PLAN

The DRC is deeply committed to strengthening the Dallas Region and its vibrant business community. Our strategic plan, called "Building Tomorrow Together," is based on three core priorities: increasing economic growth; creating the best possible quality of life to attract the brightest workers from around the world; and strengthening the local talent pipeline for all students from pre-K through higher education. And every day, we work with hundreds of member companies and regional partners to advocate for pro-business, pro-growth public policies to achieve these priorities and to strategically manage our region's continued growth.



ECONOMIC DEVELOPMENT

CORPORATE RECRUITMENT

The DRC works with our regional and state allies, as well as our Tomorrow Fund investors, to bring companies and new jobs to the Dallas Region. Our strategic focus is to attract U.S. and international headquarters, recruit good manufacturing jobs – including to Southern Dallas – and to drive job growth and innovation, and foster an entrepreneurial culture.

BY THE NUMBERS: 2019

24

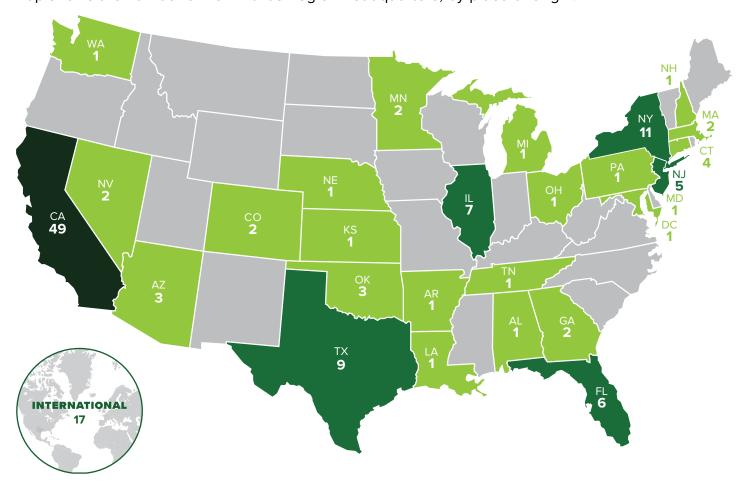
INCLUDING

3

FORTUNE 500 HEADQUARTERS FORTUNE 10 HQS (AT&T, EXXONMOBIL, McKESSON)

DALLAS REGION HAS ADDED 137 NEW HEADQUARTERS SINCE 2010

Map shows the number of new Dallas Region headquarters, by place of origin.



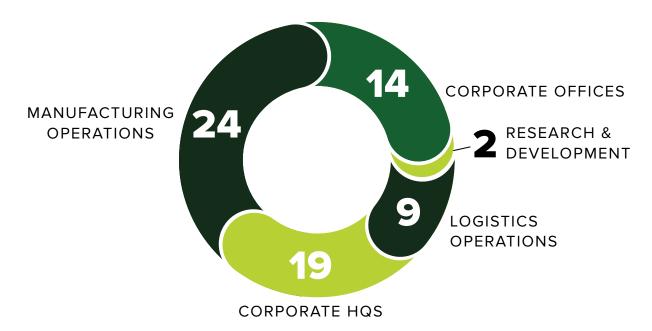
Please visit www.dallaschamber.org/relos for the DRC's comprehensive relocation map.

In 2019, Uber selected Dallas for its new office hub, which will be the company's largest presence outside San Francisco.

JOBS

5138K AVERAGE ANNUAL WAGE 450K **SQUARE FEET**

2019 DRC RECRUITMENT PIPELINE BY CATEGORY



VISITS FROM COMPANIES CONSIDERING LOCATING TO THE DALLAS REGION

DOMESTIC MARKETING MISSION TRIPS AND EVENTS CONDUCTED BY THE DRC

SITE SELECTORS GUILD

In September, the Dallas Regional Chamber hosted 29 national and international site selectors in our region at the 2019 Site Selectors Guild Fall Forum. Guild members represent U.S. and international corporations considering where to relocate or expand and are a key target audience for our corporate recruitment efforts. Recent corporate moves to the region that were advised by site consultants include: Toyota Motor North America, Hilti North America, McKesson, and Uber.



ECONOMIC DEVELOPMENT

INTERNATIONAL

In partnership with our regional allies, the DRC is working to raise our international profile in order to attract more companies, flights, and talent from around the world.

BY THE NUMBERS: 2019

44

VISITING INTERNATIONAL DELEGATIONS

4

INTERNATIONAL COMPANY EXPANSIONS AND RELOCATIONS

INTERNATIONAL FLIGHTS

DFW International Airport provides easy access to anywhere in the world. The DRC continues to advocate for new international flights, which help bolster the region's economy and profile abroad. In 2019, seven new nonstop direct flights began, including to Dublin and Munich, and seven additional flights were announced, including Auckland, Tel Aviv, and Tokyo Haneda.

1 INTERNATIONAL = \$220-\$300M ECONOMIC IMPACT FOR DALLAS REGION

FACE-TO-FACE MEETINGS

The DRC's international team planned and executed marketing trips to Australia, Canada, and Japan in 2019. In addition, the DRC had more than 100 face-to-face meetings with international delegations representing 24 countries.



ECONOMIC DEVELOPMENT

INNOVATION

The DRC supports the launch and growth of innovation activities in the Dallas Region by connecting entrepreneurs, innovators, researchers, and the business community.

BY THE NUMBERS: 2019





TOP RESEARCH UNIVERSITIES AS DESIGNATED BY CARNEGIE

- University of North Texas
- University of Texas at Arlington
- University of Texas at Dallas

MOST HIGH-TECH JOBS ADDED IN THE U.S. (2015-2019)

DRC SUPPORTING INNOVATION



DALLAS INNOVATES

Daily online news source and annual print publication for what's new, next, and reimagined



INNOVATION TASK FORCE

Convenes DRC Members to discuss and advocate for innovation in the Dallas Region



STARTUP ECOSYSTEM

Connects entrepreneurs to the resources needed to start and grow a business



CORPORATE INNOVATION

Provides research and support to key decision makers to expand high-tech activities



TEXAS RESEARCH ALLIANCE

Builds research partnerships between industry leaders and local universities

TALENT ATTRACTION

Say Yes to Dallas is a DRC initiative to attract and retain talented workers from around the world. It highlights the Dallas Region as a great place to start or continue a career, raise a family, and experience one of the most vibrant and affordable places in the U.S. This multi-channel marketing campaign aimed at young, skilled professionals includes an interactive website, social media platforms, and a relocation magazine.

BY THE NUMBERS: 2019

14K+

SOCIAL MEDIA FOLLOWING

115K+

WEBSITE PAGE VIEWS

2.6M

SOCIAL MEDIA IMPRESSIONS

63K+

VIDEO VIEWS

SAY YES TO DALLAS RECRUITING RESOURCES

Say Yes to Dallas is more than a talent attraction campaign; it's a resource that provides a wealth of useful information on the Dallas Region for both recruiters and candidates.



For Recruiters - Toolkit & Training

A recruiter's resource to share the Dallas Region's story and answer questions job candidates might ask about life here. Gain access to key messages, marketing materials, and on-site trainings. In 2019, we shared these services with the Dallas Police Department, including recruiter training and traveling with DPD for a Chicago recruitment trip.

For Candidates - Essentials Guide

From neighborhood guides to a cost of living calculator, candidates can explore what it's like to live in the Dallas Region.

sayyestodallas.com/recruiting-toolkit

SAY YES TO DALLAS CAMPAIGN PRIORITIES

Our goal is to make Say Yes to Dallas the leading talent attraction campaign for young, skilled professionals to move to the Dallas Region.



COLLABORATE WITH LOCAL EMPLOYERS, HR AND RECRUITING EXECUTIVES, AND COLLEGE CAREER SERVICES



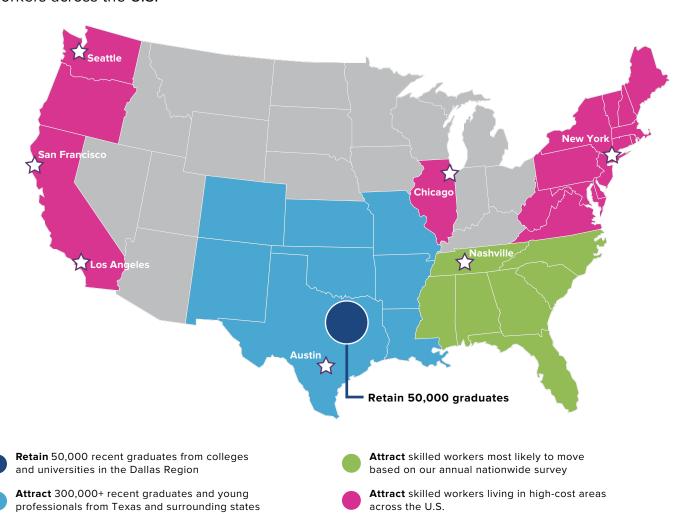
ELEVATE THE SAY YES TO DALLAS BRAND THROUGH RECRUITING WORKSHOPS, CAREER FAIRS, AND COLLEGE INTERN MIXERS



POSITION THE DALLAS REGION AS A HUB FOR HIGH-TECH WORKERS

SAY YES TO DALLAS TARGETING STRATEGY

Say Yes to Dallas has a defined targeting strategy aimed at key geographic areas and technology workers across the U.S.



EDUCATION & WORKFORCE

The interests of local students and the business community are directly aligned: improving educational outcomes for students while expanding career opportunities for them - and creating a sustainable, highly trained workforce for our regional businesses. The DRC works to improve education across the continuum – early childhood, K-12, higher education, and workforce development – so that every student has the tools and skills needed to find a quality job that provides for a high quality of life.

BY THE NUMBERS: 2019

DRC EDUCATION EVENTS AND COUNCIL MEETINGS ATTENDED BY

3.5K

BUSINESS MEMBERS

THE DRC WORKS ON BEHALF OF

162 SCHOOL DISTRICTS & CHARTER SYSTEMS

REGIONAL HIGHER EDUCATION **INSTITUTIONS**

IMPACTING

.8M

STUDENTS

2019 LEGISLATIVE OUTCOMES

During the 86th Texas Legislative Session, the DRC advocated on behalf of the Dallas Region's business community in key education areas.

Among the advocacy "wins":

HB 3

PUBLIC SCHOOL FINANCE

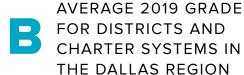
State investment of \$6.6B in new funds for public education and \$5B in property tax relief

HIGHER EDUCATION TRANSFER & PROGRESS

Improved transfer and academic progress rules to support post-secondary completion

THE DALLAS REGION'S PUBLIC EDUCATION PROGRESS & SUCCESSES

Many of the initiatives for which the DRC has advocated have contributed to improvements in schools across the Dallas Region. The results are reflected in the state's A-F graded accountability system.



121 (OUT OF 162)

DISTRICTS AND CHARTER SYSTEMS THAT IMPROVED SCORES IN 2019



COMMUNITY COLLEGE CREDIT HOURS EARNED BY DALLAS ISD STUDENTS IN 2018-19

18%

IMPROVEMENT FROM 2012 STATEWIDE TEST SCORES FOR DALLAS ISD STUDENTS

(MOST IMPROVEMENT OF ANY LARGE URBAN DISTRICT IN TEXAS)

STRENGTH OF THE DALLAS REGION'S HIGHER EDUCATION

71K

DEGREES COMPLETED ANNUALLY

72%

DFW HIGHER EDUCATION STUDENTS WORK IN DALLAS REGION AFTER GRADUATION

\$13B

ANNUAL ECONOMIC IMPACT BY DALLAS REGION HIGHER EDUCATION INSTITUTIONS

\$67B

REGIONAL GROSS
ECONOMIC BENEFIT
FROM GRADUATES
OF DALLAS REGION
INSTITUTIONS

(ACCOUNTING FOR 15% OF THE TOTAL REGIONAL ECONOMY)

INDUSTRY COLLABORATIONS

The DRC launched the North Texas Investment Services Coalition and the North Texas Construction Coalition to focus on providing industry-led solutions to address economic and workforce challenges.



+





SERVICE PROVIDERS



INDUSTRY COLLABORATIONS

PUBLIC POLICY

The DRC works with elected officials to advocate for pro-business, pro-growth public policies, while maintaining a high quality of life for all who live, work, and do business here.

BY THE NUMBERS: 2019

1,059

WITH

260

PIECES OF LEGISLATION TRACKED

ACTIONS TAKEN
ON BILLS

2019 LEGISLATIVE OUTCOMES

During the 86th Texas Legislative Session, the DRC worked closely with member companies and legislators to advocate on issues important to the Dallas Region's businesses, including these:



BUDGET PRIORITIES

Invested \$11.6B in school finance legislation

- \$4.5B in new educational reform funds
- \$2.1B in dynamic teacher pay
- \$5B in property tax relief



EDUCATION & WORKFORCE

- Improved process for transfer of academic credits to support college completion
- Funded program that matches private gifts for enhanced research, faculty recruitment at public higher education institutions



ECONOMIC DEVELOPMENT

- Extended key tax exemption incentive to help attract companies
- Prevented passage of discriminatory legislation



INFRASTRUCTURE

- Extended funding program for highway construction
- Protected the High-Speed Rail project





HEALTH CARE

- Created state organization to improve mental health care for Texas children
- Renewal of fund for indigent care in Dallas and Tarrant counties

2020 CENSUS

Every 10 years, the U.S. Census Bureau conducts a constitutionally mandated count of each person living in the country and the five U.S. territories. The count is utilized for distributing the number of U.S. Congressional seats by state, drawing state legislative districts, and for funding of federal programs, all of which impact our quality of life. An undercount in Texas could negatively affect where, or whether, businesses choose to invest in Texas, and potentially impede the economic security of Texas families.

\$300M FEDERAL FUNDS LOST ANNUALLY

PER

UNDERCOUNT IN TEXAS

25% OF TEXANS (DIMIT PEOF LE HARD-TO-COUNT AREAS OF TEXANS (6M+ PEOPLE) LIVE IN

OF CHILDREN UNDER 5 (582K CHILDREN)
AT RISK OF NOT BEING COM

Businesses and their employees can guarantee an accurate count is taken in 2020 by using resources on www.dallaschamber.org.

VOTER ENGAGEMENT

To meet the needs of our expanding economy and population, we support the Dallas Region's elected officials who champion pro-growth public policies. Voters can help elect those leaders by utilizing NorthTexasVotes.org, which contains information and resources about how to vote, where to vote, and information about each candidate, or initiative, on the ballot.

28.7 MILLION STATEWIDE POPULATION

19.9 MILLION TEXANS OF VOTING AGE

8.3 MILLION TEXANS VOTED IN 2018 GENERAL ELECTION

2.6 MILLION TEXANS VOTED IN 2018 PRIMARY ELECTION

694 THOUSAND NORTH TEXANS VOTED IN 2018 PRIMARY ELECTION

LEADERSHIP PROGRAMS

One of the most impactful ways we serve our members and our community is through our leadership programs, which are designed to grow leaders across companies, careers, and communities.

Our goal is to help develop a diverse group of leaders and advance inclusive growth in the Dallas Region through the intersection of business and community.

BY THE NUMBERS: 2019



INDIVIDUALS ENGAGED

218
SPEAKERS

42%

OF DRC MEMBER
COMPANIES PARTICIPATE

79
LEADERSHIP EVENTS

LEAD WITH US

Individuals and companies participating cite three main benefits:





YOUNG PROFESSIONALS (YP)

Provides young professionals the opportunity to grow their leadership skills, serve the community, network with peers, and engage with business and community leaders through events and LEAD YP, a professional development program specifically for YP members.

Membership:

- 400+ young professionals across all industries, ages 22-40
- Membership accepted year-round



LEADERSHIP DALLAS (LD)

Founded in 1975, Leadership Dallas is the region's flagship leadership development program, aimed at growing an ongoing pipeline of diverse leaders through a 10-month curriculum that explores critical issues and creates positive change in the Dallas Region.

Membership:

- New class chosen in spring; program begins in September
- 55 representatives of various organizations and industries



LEADERSHIP DALLAS ALUMNI ASSOCIATION (LDAA)

The Leadership Dallas Alumni Association educates LD graduates about significant issues facing the Dallas Region and encourages them to remain active, engaged leaders in the community.

Membership:

- Annual and lifetime memberships available
- More than 2,000 Leadership Dallas graduates



EXECUTIVE WOMEN'S ROUNDTABLE (EWR)

A professional development and relationship-building program for executive-level women to discuss the opportunities and challenges of their leadership roles, and to broaden their professional perspectives.

Membership:

- By application only; accepted year-round
- More than 120 executive-level women



WELCOMING NEW EXECUTIVES (WNE)

Designed for newly relocated or recently promoted senior executives and their significant other to make connections and discover the Dallas Region. Exclusive programming includes 2.5-day retreat, welcome receptions, and invitations to sporting and cultural events.

Membership:

- By application only; senior executive and spouse/significant other
- Attendees include top business and community leaders

DRC MEMBERSHIP

At its core, the DRC is a connector, bringing together industry experts, business and community leaders, young professionals, seasoned executives, and individuals passionate about the Dallas Region and invested in its growth and success. DRC membership provides access to conversations, initiatives, and programs led by the DRC, as well as the opportunity to make an impact. We thank the companies that invest in membership and choose to engage with us. Together, we are leading the Dallas Region to be the best place in the United States to live, work, and do business.

800

MEMBER COMPANIES

20 FORTUNE 1,000 MEMBER COMPANIES

American Airlines • AT&T • Atmos Energy Corporation • Brinker International • Cinemark Holdings, Inc. • Comerica Darling Ingredients • ExxonMobil • Fluor Corporation • Globe Life Inc. • HollyFrontier Corporation • Jacobs Kimberly-Clark Corporation • Pioneer Natural Resources • Rent-A-Center • Southwest Airlines • Tenet Healthcare Texas Instruments • Trinity Industries • Vistra Energy

26 COMPANIES WITH 75+ YEARS OF MEMBERSHIP

7-Eleven, Inc. • American Airlines • AT&T • Atmos Energy Corporation • Austin Industries • Bank of America Baylor Scott & White Health • The Beck Group • Blue Cross and Blue Shield of Texas
Boy Scouts of America Circle Ten Council • Boys & Girls Clubs of Greater Dallas
Carrington, Coleman, Sloman & Blumenthal, L.L.P. • Clark Hill Strasburger • Coca-Cola Southwest Beverages
Corrigan Investments, Inc. • Dallas Plumbing Company • Ernst & Young LLP • Ewing Automotive Group
IBM Corporation • The Kroger Co. • Oncor • PepsiCo/Frito-Lay North America • Southern Glazer's Wine & Spirits
Southern Methodist University • Vent-A-Hood Company • YMCA of Metropolitan Dallas

OUR TOMORROW FUND

Our Tomorrow Fund investors represent some of the greatest leaders in our business community. Thanks to their support, the Dallas Region is growing more rapidly as a top location for business. Tomorrow Fund investments provide critical support that is specifically targeted for the implementation of our core priorities - Economic Development, Talent Attraction, Education and Workforce, and Public Policy.



ORGANIZATIONS AND INDIVIDUALS CONTRIBUTE TO THE TOMORROW FUND TO ACCELERATE THE PROSPERITY OF OUR REGION

TOP INVESTOR COMPANIES

7-Eleven, Inc. • American Airlines • AT&T • Atmos Energy Corporation • Axxess • Baylor Scott & White Health The Beck Group • Blue Cross and Blue Shield of Texas • Boeing • Comerica • Copart • Deloitte Ernst & Young LLP • Foley Gardere LLP • Haynes and Boone • Hillwood Development Company, LLC Hilti North America • Jacobs • JPMorgan Chase & Co. • KPMG • Locke Lord LLP The Men and Women of Hunt Consolidated, Inc. • PwC • Texas Capital Bank • Texas Instruments Toyota Motor North America • Wells Fargo Bank

TOP INDIVIDUAL INVESTORS

Jay Adair • Eric Affeldt • Peter Beck • Hal Brierley • Crow Holdings • Jim Erwin • Richard Fisher
Hawthorne Family Fund • Bill Henry • Lyda Hill • Ann and Lee Hobson • Robert Kaplan • Jim W. Keyes
Aasem Khalil • Amy and Jason Kulas • Bobby Lyle • Franklin McLarty • Tom A. Montgomery • Pete Schenkel
Scovell Family Foundation • Lane Sorgen • Steinhart Family Advised Fund • Lenise and Randall Stephenson
Todd Williams

TOMORROW FUND PROGRESS

In 2016, we launched the Tomorrow Fund to support "Building Tomorrow Together," our strategic plan. Four years later, we've made significant progress – achieving an annual Tomorrow Fund investment of \$4 million – but we still have work to do to achieve our goal of \$5.5 million per year.

BUILDING TOMORROW TOGETHER (2016-2020)



DRC CONTACT INFORMATION

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TALENT ATTRACTION talentattraction@dallaschamber.org

YOUNG PROFESSIONALS yp@dallaschamber.org



