



#CAECONOMY.ORG



# CALIFORNIA ECONOMIC SUMMIT

---

2013

## REGIONAL FORUM RESULTS & CHARTERING ACTION TEAMS

Steering Committee Meeting  
June 27, 2013

## SUMMIT LEADERSHIP

HONORARY CHAIRS

**George Shultz**  
Hoover Institute  
Stanford University

**Leon Panetta**  
The Panetta Institute for  
Public Policy

CO-CHAIRS

**Ashley Boren**  
Executive Director  
Sustainable Conservation

**Jessie Knight**  
Chairman and CEO  
San Diego Gas & Electric

**Jim Earp**  
Executive Director,  
California Alliance for Jobs

**Gavin Newsom**  
Lieutenant Governor  
State of California

**Michael Rossi**  
Senior Advisor of Jobs and  
Business Development  
Office of the Governor

**Dave Regan**  
President  
SEIU-United Healthcare  
Workers West

**Ashley Swearengin**  
Mayor  
City of Fresno

**Laura Tyson**  
S.K. and Angela Chan Chair  
in Global Management  
Haas School of Business  
University of California,  
Berkeley

STEERING COMMITTEE

**Bill Allen**  
President and CEO  
Los Angeles County  
Economic Development  
Corporation

**Lucy Dunn**  
President and CEO  
Orange County Business  
Council

**Steve Frisch**  
President  
Sierra Business Council

**Paul Granillo**  
*Co-chair*  
President and CEO  
Inland Empire Economic  
Partnership

**Carl Guardino**  
President and CEO  
Silicon Valley Leadership  
Group

**Glenda Humiston**  
State Director  
USDA Rural Development

**Sunne McPeak**  
*Co-chair*  
President and CEO  
California Emerging  
Technology Fund

**Lenny Mendonca**  
Director  
McKinsey & Company

**Bill Mueller**  
CEO  
Valley Vision (Sacramento)

**Sean Randolph**  
President  
Bay Area Council  
Economic Institute

**Lauree Sahba**  
COO  
San Diego Regional  
Economic Development  
Corporation

**Ben Stone**  
Director  
Sonoma County Economic  
Development Board

MANAGEMENT TEAM

**Julie Meier Wright**  
Strategic Advisor  
Collaborative Economics

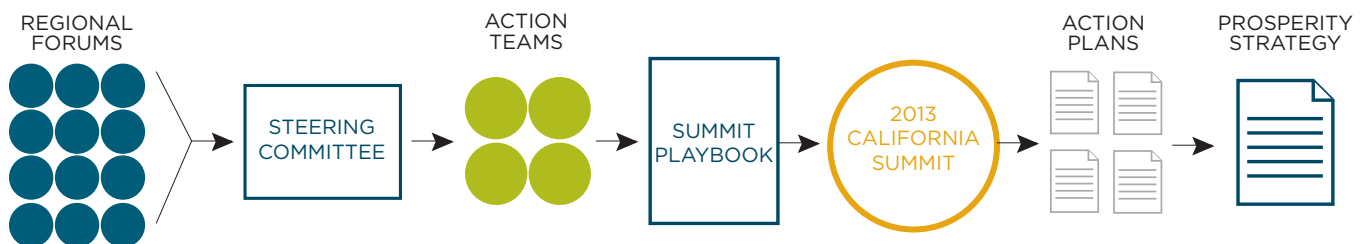
**James P. Mayer**  
Executive Director  
California Forward

**Doug Henton**  
Chairman and CEO  
Collaborative Economics

**Susan Lovenburg**  
Director  
Partnership for Economic  
Prosperity  
California Forward

## SUMMIT PROCESS

The Summit promotes prosperity and opportunity by developing a regions-driven shared agenda for state action. With input from your region and from other regions in California, the Summit Steering Committee will identify widely shared priorities and charter Action Teams that will identify specific actions to address those priorities. In late 2013, a statewide Summit meeting will be held to build on the work of the Action Teams and move to implementation.



## PURPOSE

This report is to prepare Steering Committee members for the June 27 all-day meeting, where the Committee will consider the results of the 16 Regional Forums held across California in April and May. The Forums engaged over 1700 regional leaders representing business, education, government, labor, environment and as well as elected officials to identify top priorities in workforce, infrastructure, regulations, innovation, capital, and other areas critical to the regions' prosperity. Forum participants discussed which of these priorities could be most effectively addressed through collaboration with other regions and state partners through the Economic Summit. You can find blog posts about each Regional Forum on [caeconomy.org](http://caeconomy.org).

These regional priorities are summarized in the spreadsheet attached to this report. They are organized by category: workforce, infrastructure, regulations, innovation, capital, and other (which includes the shared priorities of working landscapes and global connectivity). Regions were asked to identify top priorities within and across categories through a deliberative process that engaged a range of stakeholders..

On June 27, the Steering Committee will charter Action Teams according to four basic criteria approved by the Steering Committee in May (see page 12 for full description of Action Team Criteria):

- **Focuses on the triple bottom line** (not a single bottom line) of economic, social and environmental progress
- **Reflects a widely shared regional priority** (not a narrowly shared priority of a handful of regions or secondary issue)
- **Focuses on including opportunities for state action** legislation or administrative branch action such as Executive Order, as well as new processes and priorities that do not require a change in regulations or law
- **Has clear regional champions identified**

The following additional criteria will also be considered:

- **Builds on an existing Signature Initiative**, rather than moves in a completely new direction
- **State-level partners show willingness to collaborate** with regional champions on the initiative
- **Examples from California regions or other states** suggest it's a promising area for action

Consistent with the priorities from the Regional Forums, the Steering Committee will also define the charter of each Action Team, and discuss potential leads for each Team. The remainder of this report is organized into the following sections:

1

**Proposed Action Teams** to address widely shared regional priorities (pp. 4-5)

2

**Summaries** of widely shared regional priorities by category (pp. 6-11)

3

**Criteria** for chartering Action Teams (p. 12)

4

**Action Team** expectations and work plan (pp. 13-14)

## PROPOSED ACTION TEAMS

The Management Team reviewed the results from the 16 Regional Forums held across California, and offers the following recommendations for Steering Committee consideration.

To arrive at these recommendations, the Management Team applied the Action Team Selection Criteria approved by the Steering Committee. We recommend the formation of an Action Team when a priority is focused on the triple-bottom-line, reflects a widely shared regional priority, and includes opportunities for state-level action. Each Team also has potential regional champions and state-level partners that have indicated a willingness to collaborate. And, there are examples from California and other states that suggest these areas are promising areas for action.

Workforce, regulations, and infrastructure were most commonly identified as top priorities across regions. Action Teams in these areas would build on the existing Signature Initiatives from last year's Summit. The Management Team proposes chartering a fourth Action Team on working landscapes that would include capital priorities that surfaced in 2012 and 2013. A potential fifth Team would advance a new priority for 2013 in advanced manufacturing and exports.

The brief summaries of widely shared regional priorities will inform the Committee's discussion of an Action Team's charter, i.e. the scope and focus of each Team's work.

### PROPOSED ACTION TEAMS ON WORKFORCE AND REGULATIONS

At least 12 of 16 regions came to consensus on these two broad priorities. The Management Team proposes chartering Action Teams for widely shared regional priorities in the areas of Workforce and Regulations, charging both Teams with a two-part mission:

**Workforce.** Reduce California's skilled-worker shortages through expansion of (1) career-technical education in high-demand fields (especially STEM, or STEAM), and (2) regional industry-driven education and training partnerships.

**Regulations.** Improve California's ability to advance environmentally sound and economically important development through (1) locally driven, state-supported regulatory streamlining efforts and (2) CEQA modernization.

### PROPOSED ACTION TEAM ON INFRASTRUCTURE

Across regions, there was wide agreement on prioritizing infrastructure investment. The Management Team proposes chartering an Action Team to close California's \$765-billion infrastructure deficit through a smart and integrated strategy that is financed with both (1) public investment including expanded investment options at the local level and (2) private financing, including a growing use of public-private partnerships.



#### For Discussion: Parameters of Infrastructure Action Team

While there was widespread agreement on infrastructure as a top priority, the parameters of that Action Team need to be determined by the Steering Committee. Explicit areas of focus could be:

**Transportation.** Several regions identified increased investment in transportation as an infrastructure priority given the degrading quality of California's transportation system. The Infrastructure Action Team could be chartered with an explicit focus on transportation investment.

**Water.** Eleven of the regions identified modernizing California's water infrastructure as a top priority. The Steering Committee could include water infrastructure as a component of the Infrastructure Action Team; charter an Action Team to focus exclusively on water infrastructure; or support the priority by working with the Delta Stewardship Council and other advocacy groups championing the priority.

**Broadband.** Nine regions identified expanded broadband infrastructure as a key infrastructure priority. Broadband could be included in an Infrastructure Action Team or could be included as part of a Working Landscapes Action Team, described below.

**Energy.** Developing a comprehensive energy infrastructure plan surfaced as a priority in four of the sixteen regions. Energy could be explicitly included as part of the Infrastructure Action Team with a focus on improving coordination and prioritization of state energy initiatives to cost effectively meet competing goals.

### PROPOSED ACTION TEAM ON WORKING LANDSCAPES THAT INCLUDES CAPITAL

Both working landscapes and capital were identified as areas of priority in a majority of regions. There is a strong overlap between many of the capital priorities and the broader scope of working landscapes.

The Management Team proposes chartering a Working Landscapes Action Team, charging the Team with a mission that includes strong emphasis on capital investment in local businesses and natural resource-based economies.



#### **For Discussion: Parameters of Working Landscapes Action Team**

The Working Landscapes Action Team could include a focus on:

**Capital.** Increasing investment in local businesses and economies—a top priority for most regions—is a central component of supporting job creation and economic growth based on productive use of land and natural resources.

**Rural and Urban Land Use.** The Steering Committee could charter a Working Landscapes Action Team with a focus on the interdependence among urban and rural regions on land use decisions (e.g., farmland protection and food systems, city-centered growth strategies, discouraging conversion of industrial properties in urban areas and preserving land for employment-intensive uses). These issues surfaced in several Regional Forums.

**Broadband.** Improving broadband infrastructure could be included as a focus of the Working Landscapes Action Team, with a focus on rural and under-served, urban regions.

**Goods movement.** Several regions mentioned improvement of goods movement infrastructure as a strategy for enhancing working landscapes.

### PROPOSED ACTION TEAM ON ADVANCED MANUFACTURING THAT INCLUDES EXPORTS

With ten regions--a mix of urban and rural--identifying Advanced Manufacturing as a priority, and state government making this area a priority as well, it seems to be ripe for collaborative action. In addition, eight of the sixteen regions prioritized export promotion, which is critical to the successful expansion of advanced manufacturing in California's regions. Eight regions also prioritized expansion of iHubs. The State has recently announced plans to expand manufacturing-oriented iHubs. Thus, the recommendation of the Management Team is:

**Advanced Manufacturing.** Create an Advanced Manufacturing Action Team, which connects to the State's manufacturing-related iHub efforts, and includes export promotion as part of its mission.

# BRIEF SUMMARIES OF WIDELY SHARED REGIONAL PRIORITIES BY CATEGORY

This section provides brief, high-level summaries of widely shared regional priorities by category (i.e., workforce, regulations, infrastructure, working landscapes, capital, advanced manufacturing, and exports). Specific regions are listed if the action area was one of their top three priorities within the category, or among their top three priorities across all categories (denoted by an asterisk). Each summary lists the most widely shared priorities for action, followed by examples of specific and related ideas. The most widely shared priorities are the basis for the Management Team’s recommendations for Action Teams.

These summaries will inform the Committee’s discussion of an Action Team’s charter, i.e. the scope and focus of each Team’s work.



## WORKFORCE

Widely Shared Priorities for Action

<b>1</b>	<b>Expand career-technical education in high-demand fields, especially STEM/STEAM</b>
<b>REGIONS</b>	<i>Bay Area*, Inland Empire, Los Angeles County, Orange County, Redwood Coast, Sacramento, San Diego*, San Joaquin Valley*, San Luis Obispo, Shasta Cascades, Sierra Nevada*, Silicon Valley*, Sonoma, Ventura</i>
<b>SPECIFIC AND RELATED IDEAS</b>	Expand linked-learning programs and the integration of career-technical education and apprenticeships into academics, as well as career pathways that expose students to career opportunities in growth sectors by combining and bringing together strong academics, a demanding technical education, active business engagement and real-world experience (Los Angeles County)
	Prepare students for Science, Technology, Engineering, and Math (STEM) careers through industry partnerships (Orange County, Bay Area, Ventura, San Diego, Silicon Valley)
	Fully fund SB 1070; Incentivize collaboration within workforce system (community colleges, WIB, CSUs etc.) (Sacramento)
	Encourage entrepreneurship training in preparing youth. (San Luis Obispo, Shasta Cascades, Redwood Coast)
	Encourage innovation in preparing youth for economic opportunity (i.e. promote alignment across institutions to comprehensively invest in youth) (San Luis Obispo, San Joaquin Valley, Redwood Coast)
	Increase opportunities for work-based learning through internships, apprenticeships, job shadowing, and subsidized employment (Sonoma)

<b>2</b>	<b>Strengthen regional industry/workforce development partnerships</b>
<b>REGIONS</b>	<i>Butte, Inland Empire, Los Angeles County, Monterey*, Orange County, San Diego*, Redwood Coast*, Ventura</i>
<b>SPECIFIC AND RELATED IDEAS</b>	Prepare students for Science, Technology, Engineering, and Math (STEM) careers through industry partnerships (Orange County, Bay Area, Ventura, San Diego, Silicon Valley)
	Better integrate community-college programs with high-demand industries (Butte, Bay Area)
	Strengthen partnerships between employers and workforce development providers (Monterey, Inland Empire, Sacramento, San Diego, Ventura)
	Increase alignment among regional occupational programs, CTE, and community colleges to more effectively engage employers (Sacramento)
	Fully fund SB 1070; Incentivize collaboration within the workforce system (community colleges, WIB, CSUs etc.) (Sacramento)
	Link education at K-12 to career opportunities through internships and project-based learning aligned with regional industry sectors (Butte, Sacramento, Sierra Nevada)



## REGULATIONS

Widely Shared Priorities for Action

<b>1</b>	<b>Regulatory/Permit Streamlining</b>
<b>REGIONS</b>	<i>Butte, Monterey*, Orange County, Redwood Coast*, San Diego*, San Joaquin Valley*, San Luis Obispo*, Shasta Cascades*, Sierra Nevada*, Sonoma*, Ventura*</i>
<b>SPECIFIC AND RELATED IDEAS</b>	Encourage cities and public agencies to proactively engage and work with the private sector to streamline regulations and processes (Butte, Monterey, San Luis Obispo, Ventura, Redwood Coast, Shasta Cascades)
	Leverage California’s innovative technology to improve the responsiveness and efficiency of public sector (Butte, San Luis Obispo, Monterey)
	Regulatory streamlining such as permit-processing times for office and industrial development (San Joaquin Valley, San Diego, Orange County, Bay Area)

<b>2</b>	<b>Modernize CEQA</b>
<b>REGIONS</b>	<i>Bay Area*, Inland Empire*, Los Angeles County, Monterey, Redwood Coast, San Diego*, San Joaquin Valley, Silicon Valley*, Shasta Cascades, Sonoma, Ventura, Orange County</i>
<b>SPECIFIC AND RELATED IDEAS</b>	Streamline the CEQA process for key critical infrastructure projects (Los Angeles County)
	Eliminate unnecessary (CEQA review) duplication with existing local land-use and other standards, and clearly specify which impacts will not be considered “significant impacts” under CEQA, e.g., aesthetics, parking (Los Angeles County)
	Permit part of an EIR to be remedied without requiring the entire EIR to go through the process again (Los Angeles County)
	Modernize CEQA taking into consideration needs in both urban and rural areas (Redwood Coast, Shasta Cascades)



## INFRASTRUCTURE

Widely Shared Priorities for Action

<b>1</b>	<b>Expand public investment and private financing for infrastructure, with regional input helping to shape the comprehensive state infrastructure plan</b>
<b>REGIONS</b>	<i>Bay Area*, Butte, Inland Empire, Los Angeles County, Orange County, Sacramento*, San Diego*, San Luis Obispo, Sierra Nevada, Silicon Valley*, Sonoma*, Ventura</i>
<b>SPECIFIC AND RELATED IDEAS</b>	Increase accessibility to alternative - but generally accepted - infrastructure development, financing and delivery strategies, including public-private partnerships, private financing, Infrastructure Financing Districts, and design-build delivery methods (Los Angeles County)
	Give local governments the ability to enact, extend, or increase special taxes to fund local transportation projects with 55% voter approval (including sales taxes, parcel taxes and bond measures) (Bay Area, San Luis Obispo)
	Partially restore annual Vehicle License Tax and dedicate funds to transportation. Allocate State’s Cap-and-Trade revenues derived from vehicle fuels to transportation system needs that achieve greenhouse-gas reduction strategies and support sustainable communities (San Luis Obispo)
	Help shape comprehensive state infrastructure plan (Inland Empire, San Diego, Sacramento)
<b>2</b>	<b>Expand broadband infrastructure</b>
<b>REGIONS</b>	<i>Butte, Monterey, Orange County, Redwood Coast, Sacramento, San Joaquin Valley, San Luis Obispo, Shasta Cascades, Sierra Nevada*, Sonoma</i>
<b>3</b>	<b>Modernize California’s water infrastructure</b>
<b>REGIONS</b>	<i>Butte, Inland Empire*, Los Angeles County, Monterey*, Orange County, Redwood Coast, San Diego, San Joaquin Valley, Shasta Cascades, Ventura</i>





## WORKING LANDSCAPES

Widely Shared Priorities for Action

1	Working Landscapes
REGIONS	<i>Butte, Los Angeles County, Monterey, Redwood Coast, Sacramento, San Joaquin Valley, San Luis Obispo, Shasta Cascades, Sierra Nevada*</i>
SPECIFIC AND RELATED IDEAS	Support watershed management and improvements to address water needs for habitat and humans, and support economic opportunities that arise from those activities (Redwood Coast, Sierra Nevada, Shasta Cascades)
	Support research and development of biomass utilization and biomass energy-distribution infrastructure (Sierra Nevada, Redwood Coast)
	Increase investment in rural and natural resource economies (Redwood Coast, Shasta Cascades)
	Create value-chain services within the agricultural processing cycle (San Joaquin, Sierra Nevada)
	Provide assistance with farm and forest business plans (San Luis Obispo)
	Encourage investors to invest in improving and upgrading rural infrastructures (Sierra Nevada)
	Identify additional or new recreation opportunities to diversify tourism activities (Sierra Nevada)
	Require and fund regional industrial land needs assessment to quantify employment land supply, demand, and requirements, as well as the types of parcels needed for modern, 21st Century employment intensive uses (e.g., advanced manufacturing, digital media, biotech, clean tech, IT) (Los Angeles County)
	Identify appropriate state-level policies - including incentives - to address the “fiscalization” of land challenges and discourage conversion of industrial properties (Los Angeles County)
	Expand statewide incentives for manufacturing and other higher-value, modern “jobs-producing” industrial-land uses (Los Angeles County)
Educate the public and market the value of working landscapes (i.e. open space, biomass, tourism, air/water quality, ecotourism, renewable energy, state park/forestry reserves, agriculture, mining) (Sierra Nevada)	
Support the development of food systems at all levels; capital for new farmers, appropriately scaled processing facilities and regulatory flexibility to support local system development (Shasta Cascades)	
Improve regional corridors and goods movement infrastructure (Sacramento, San Joaquin Valley)	



## CAPITAL

Widely Shared Priorities for Action

<b>1</b>	<b>Increase investment in local businesses and economies</b>
<b>REGIONS</b>	<i>Butte*, Inland Empire, Los Angeles County, Monterey, Redwood Coast*, Sacramento*, San Diego, San Joaquin Valley, San Luis Obispo*, Shasta Cascades*, Sierra Nevada*, Sonoma*, Ventura</i>
<b>SPECIFIC AND RELATED IDEAS</b>	Increase investment in technical assistance to small and mid-sized firms to improve access to appropriate sources of capital (Ventura, Sacramento, Sonoma, Los Angeles County, Redwood Coast, Shasta Cascades, Bay Area, Orange County)
	Create templates for intermediaries to increase investment in local businesses and economies (Butte)
	Increase local equity-based opportunities for non-accredited investors (San Diego, San Luis Obispo)
	Create regional seed funds to increase small-business access to capital (Ventura, Redwood Coast, Shasta Cascades)
	Increase awareness of sources of capital; clearly define the path to access capital (Sacramento)
	Provide resources and technical support to local businesses that prepare them for loan readiness (Sonoma)
<b>2</b>	<b>Increase access to capital in under-served communities</b>
<b>REGIONS</b>	<i>Butte, Monterey, Redwood Coast, San Joaquin Valley*, San Luis Obispo, Shasta Cascades, Ventura</i>
<b>SPECIFIC AND RELATED IDEAS</b>	Create intermediaries that mitigate or reduce risk, increasing access to capital in under-served communities (San Luis Obispo)



## ADVANCED MANUFACTURING & EXPORTS

Widely Shared Priorities for Action

<b>1</b>	<b>Create and support advanced-manufacturing initiatives in regions across the state.</b>
<b>REGIONS</b>	<i>Butte*, Los Angeles County, Monterey, Redwood Coast, San Diego, San Joaquin Valley, San Luis Obispo*, Shasta Cascades, Silicon Valley, Ventura*</i>
<b>2</b>	<b>Expand and create networks among iHubs to stimulate partnerships, economic development, and job creation among research clusters.</b>
<b>REGIONS</b>	<i>Butte, Inland Empire*, Los Angeles County, Redwood Coast, Sacramento, San Joaquin Valley, San Luis Obispo, Sonoma</i>
<b>SPECIFIC AND RELATED IDEAS</b>	Provide more state innovation-based incentives, including adequately funding the CA iHub program and providing hiring incentives to provide on-the-job experience for recent grads in innovation-based sectors (Los Angeles County)
<b>SPECIFIC AND RELATED IDEAS</b>	Fund iHubs as an organized framework for technical assistance and capital offerings (Sacramento)
<b>SPECIFIC AND RELATED IDEAS</b>	Strengthen venture capitalist component within iHub Initiative (Orange County)
<b>3</b>	<b>Exports/Global Connectivity</b>
<b>REGIONS</b>	<i>Bay Area, Butte, Inland Empire, Monterey, Orange County, Sacramento*, San Luis Obispo, Ventura*</i>
<b>SPECIFIC AND RELATED IDEAS</b>	Create statewide export strategy to align and coordinate export-promotion efforts (Butte, Monterey, Ventura)
<b>SPECIFIC AND RELATED IDEAS</b>	Improve business awareness of the opportunities through international trade to improve economic sustainability and provide resources to facilitate businesses to benefit from that capacity (Ventura)
<b>SPECIFIC AND RELATED IDEAS</b>	Attract employment-producing foreign direct investment to the state through programs such as the EB-5 Investor Visa program (Orange County)
<b>SPECIFIC AND RELATED IDEAS</b>	Develop and support international trade initiatives such as the California State Trade and Export Promotion to facilitate export promotion activities, serving targeted industries, to drive exports for businesses (Orange County)

## ACTION TEAM CRITERIA

The Steering Committee determined that a regional priority must meet the following basic criteria in order to charter a 2013 Action Team:

- **Focuses on the triple bottom line** (not a single bottom line) of economic, social and environmental progress
- **Reflects a widely shared regional priority** (not a narrowly shared priority of a handful of regions or secondary issue)
- **Focuses on opportunities for state action** – legislation or administrative branch action such as Executive Order, as well as new processes and priorities that do not require a change in regulations or law
- **Has clear regional champions identified**

The following will also be considered:

- **Builds on an existing Signature Initiative**, rather than moves in a completely new direction
- **State-level partners show willingness to collaborate** with regional champions on the initiative
- **Examples from California regions or other states** suggest it's a promising area for action

After applying these criteria, the Steering Committee will have three options:

**Champion the Priority:** The Steering Committee charters an Action Team, either re-chartering an existing team or creating a new one. In either case, the Committee defines the parameters within which an Action Team works.

**Support the Priority:** The Steering Committee determines that an Action Team is not currently warranted but authorizes the Management Team to draft a letter of support and include a summary of shared priorities across regions, and provide that package to those who will advocate for those actions. Be prepared to continue to support the priority by restating Summit Action Plan principles as an issue progresses through the policy process.

**Defer the Priority:** The Steering Committee can defer some areas if they do not represent a widely enough shared regional priority, or if they do not meet the other criteria. This option (along with option 2) is insurance against “agenda explosion,” and for issues that get pushed forward from outside the Regional Forum process. This option could also be used to suggest further incubation of a topic by other means, including framing it at the 2013 Summit as a possible issue for 2014. Regions for which priority is key will be encouraged to work collaboratively on the priority.

## ACTION TEAM EXPECTATIONS & WORK PLAN

Summit Action Teams play a key role in developing a roadmap for promoting triple-bottom-line prosperity in California. Action Teams are chartered to address key priorities that regions across the state have identified as critical to creating jobs and promoting competitiveness in California.

### ACTION TEAM LEADS

Action Teams will be led by one regional leader and one subject-matter expert involved in ongoing advocacy for the issue. Action Team members will be drawn from the regions, the Advisory Committee and subject-matter experts. Care will be taken to ensure balance and diversity of perspective, input from all regions for which the issue is a priority, and a commitment to positive action. The focus is to develop consensus in high-priority areas and advance shared goals through linkages with existing advocacy organizations and efforts.

### RESPONSIBILITIES AND COMMITMENT

Action Team leads commit to:

- **Recruit Action Team members** reflecting geographic balance and diversity of perspective
- **Convene and lead at least three Action Team conference calls between August and September** to develop Action Plan and concrete implementation steps
- **Finalize Action Plan** with the support of the Summit Management Team
- **Lead session at the November Economic Summit** aimed at enlisting support from Summit attendees
- **Lead implementation of Action Plan** in partnership with advocacy organizations
- **Report on Action Team progress** for caeconomy.org Progress Tracker
- **Work with Summit Management Team to provide recommendations** on go-forward strategy for 2014 Regional Forums and Summit

Action Team members commit to:

- **Support development of Action Plan** and participate in at least three conference calls between August and September
- **Attend Economic Summit in November**
- **Support implementation of Action Plan** in partnership with advocacy organizations

## WORK PLAN

Action Teams are charged with developing an Action Plan with concrete implementation steps in advance of the November 7-8 California Economic Summit.

June 27, 2013	<b>Action Teams Chartered</b> Steering Committee charters Action Teams and recommends initial Action Team leads representing regional leaders as well as leaders with statewide subject-matter expertise
July 2013	<b>Action Team Members Recruited</b> Action Team members recruited and briefed
August-September 2013	<b>Action Plans Developed</b> With the support of the Summit Management Team, Action Teams hold a minimum of three conference calls to develop their Action Plan and concrete implementation steps
October 1, 2013	<b>Action Plans Finalized</b> Action Plans finalized and submitted to Summit Management Team to be integrated into Policy Playbook for the 2013 Summit
November 7-8, 2013	<b>California Economic Summit</b> Action Team members participate at the Summit and lead session on implementation of Action Plan, enlisting support from Summit attendees
January 15, 2014	<b>Presentation of 2013 Summit Action Plan</b> Sacramento meetings/event to present 2013 Summit Action Plan to the Administration and Legislature
January-March 2014	<b>Advocacy Coordination</b> Action Teams monitor legislative proposals, advocate/partner with advocacy organizations, and update Progress Tracker on caeconomy.org
April-June 2014	<b>2014 Regional Forums</b> Action Teams inform 2014 Regional Forums, to take place in April and May; Action Team leads work with Summit Management Team to recommend go-forward strategy for their Action Team

**ACTION PLAN TEMPLATE** ([See last year's Action Plan at caeconomy.org.](http://caeconomy.org))

### I. Problem & Goal Statements (1 paragraph each)

The problem and goal statements briefly summarize the key problem that the initiative aims to address as well as the goal of the initiative. Action Teams can draw from regional input on problem and goal statements for each of the categories identified as top priorities.

### II. Measurable Objectives & Actions to Achieve Goal and Objectives (2-3 pages)

Identify specific objectives as well as necessary actions to achieve the over-arching goals of the initiative. Objectives should be SMART: specific, measurable, attainable, realistic, and timely, or grounded within a specific time frame. Develop triple-bottom-line measures of economic, social, and environmental progress, which will be used to measure success.

### III. Implementation Requirements

Identify specific next steps to take the plan into implementation.

### IV. Concrete Implementation Steps for Summit Participants

At the Summit meeting in November, over 500 Californians will be gathered to build support for the Summit agenda. Action Teams are asked to identify concrete implementation steps that Summit attendees can commit to take on individually.