

GREATER HOUSTON  
**PARTNERSHIP®**



## Marc Watts, Chair

### GREATER HOUSTON PARTNERSHIP

As we began 2018, we discussed focusing our efforts on increasing the Houston business community's engagement in the political and civic life of our region. In other words, working to ensure the voice of business leaders is heard on the major challenges and opportunities facing the city.

I am proud to say we have lived up to this charge. Over the course of the year, it became quite clear the Partnership is a valued partner and voice on key matters, and in many cases the essential voice. While we still have much to do, we should pause to reflect on the incredible work we did together in 2018.

One area I am particularly proud of is our work to bolster Houston's flood resiliency. From the earliest days, the Partnership has been on the front lines of assessing and coordinating the region's flood infrastructure needs. We took a co-leadership role with city and county leaders along with our congressional delegation to advocate for critical resiliency funding from Washington D.C. We also helped lead the campaign to pass Harris County's \$2.5 billion flood bond election, which succeeded with 86% of the vote. We know securing funds is only the first step. The Partnership will work to ensure efficient and effective management of the projects and help lead efforts to request additional appropriations.

I could write about our equally-intensive efforts related to education in Houston and across Texas. The same goes for our UpSkill Houston efforts to build a more skilled workforce or our support for Houston Exponential's work to accelerate Houston's progress to become a leading tech ecosystem.

On some initiatives we were out front, others behind the scenes. Regardless of our role, I believe the Partnership is the singular organization sitting at the nexus of the issues of the day. As business leaders, it is incumbent on each of us to lend our voice and talents to making our city a better place, and I can think of no better organization to engage in that work than the Partnership.

Thank you for your commitment to Houston and this organization. We're as well-positioned as we've ever been, but there's certainly much work left to be done. I look forward to working alongside each of you in the years to come.



## Bob Harvey, President and CEO

### GREATER HOUSTON PARTNERSHIP

The work of building and advancing a great global city does not have a beginning, middle or end – it is a process of continuous improvement over the course of many decades. But one can reasonably observe that Houston has experienced a radical transformation over the last decade that has positioned us among the world's great metros.

That said, we know we have much work to do to keep our region moving forward. At our 2018 Annual Meeting, I mentioned a number of key priorities that we need to tackle together to ensure Houston maintains our position in the long-term.

I believe we made great progress on a number of these, and one area I want to highlight is the tremendous momentum Houston has established related to growing our innovation ecosystem. Based on a plan developed by the Partnership and Accenture, along with the work of many in our community, including Mayor Sylvester Turner, we've embarked on an ambitious strategy to establish Houston as a top-10 tech ecosystem in the next five years.

The great news is, everyone is contributing to the wins: the formation of Houston Exponential to drive and build connections across the ecosystem, Rice University's announcement of the Innovation District in Midtown, Texas Medical Center's vision for its TMC3 campus, Verizon choosing Houston as one of four 5G launch points nationwide, the \$25 million initial closing of the HX Venture Fund and HPE's \$10 million gift to UH's Data Science Institute to name a few. Our companies are partnering with Google, Amazon and Microsoft to transform their businesses, leveraging the power of massive data sets. Outstanding groups like Station Houston, TXRX Labs, and The Cannon are working with start-ups, companies and VC firms to accelerate the growth of the ecosystem. The momentum is real, and there is much more to come in 2019.

It is critical that we in the business community keep our shoulder to the wheel, not just in innovation, but across a number of key priorities to propel Houston forward. To do this, we are launching our new *Houston Next* strategy to guide our efforts over the next 7-10 years. We invite you and your companies to join us in this effort as we work to advance Houston as a great global city.



## Making Houston Greater

The Greater Houston Partnership is the region's premier business organization, **representing more than 1,000 member companies** that work together to advance Houston as a great global city. We champion Houston's growth and success by bringing together business and civic-minded leaders to address the region's unique challenges.

The Partnership has long promoted Houston's economic growth through economic development efforts aimed at attracting leading global companies to Houston, creating jobs and growing the region's GDP. We also advocate for our region at the local, state and federal levels. In short, **we work to make Houston greater.**

As we look ahead to 2019, we know there is much work to be done. The continued commitment of business leaders is essential as we work together to pursue what's next for Houston.



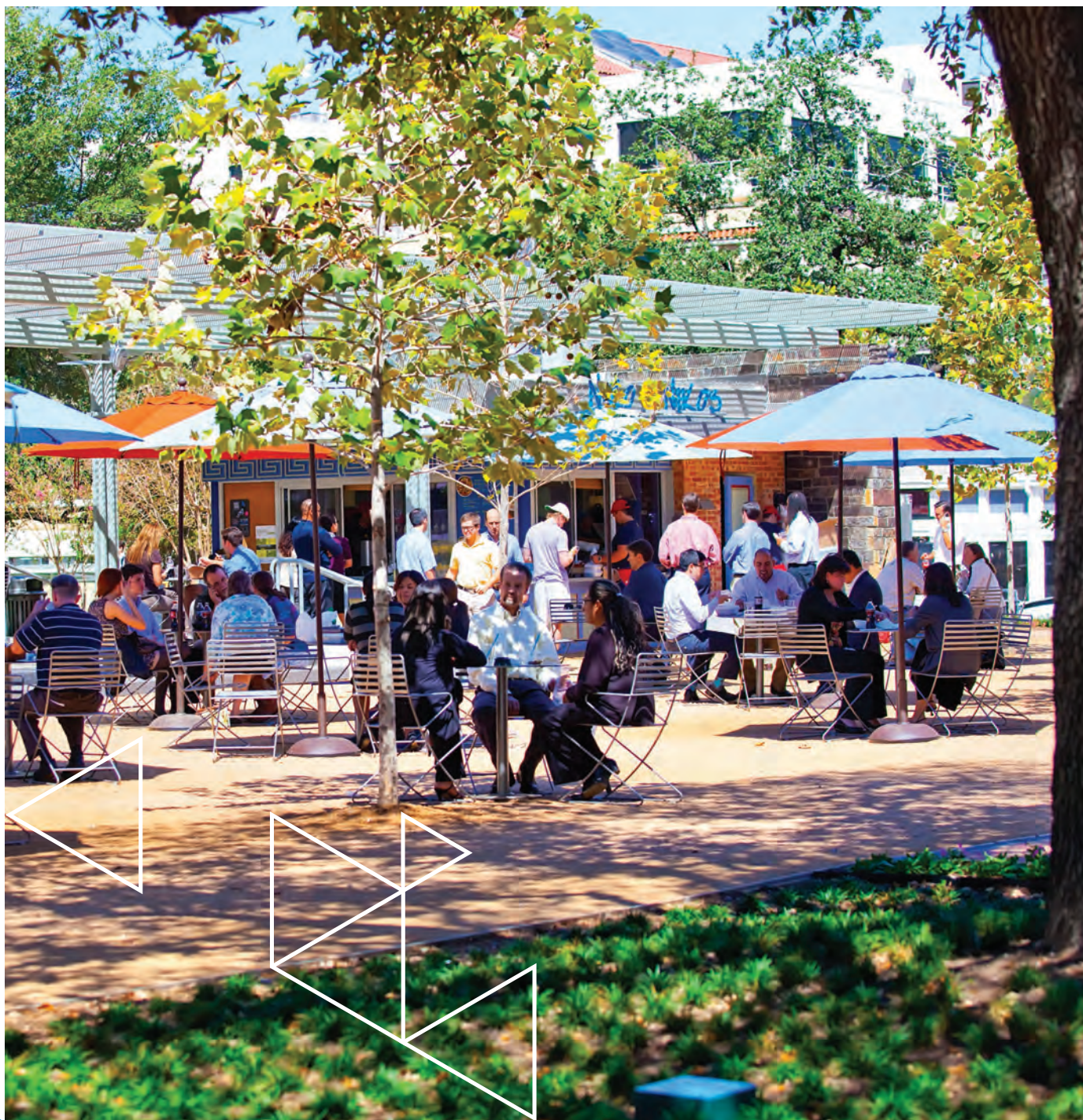




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## Houston Next

Shanghai, Tokyo, Singapore, London, New York, Frankfurt...all great global cities. Cities that are beacons of commerce and prestige, drawing the best and brightest from around the world.

Since its founding over 180 years ago, Houston has enjoyed a remarkable history of growth and prosperity, and that success has accelerated rapidly in the last decade.

We are a city of opportunity. A city where business leaders step up and get things done. A city where no idea is too big and no vision too far off for us to focus our collective efforts to move our region forward.

Through the vision and hard work of generations of leaders that have gone before us, Houston rightfully owns a position among the world's great metros.

### SO, WHERE DOES HOUSTON GO NEXT?

Over the course of 2018, the Partnership, with assistance from McKinsey & Company, developed the Houston Next Strategy, aimed at ensuring Houston's position as a great global city for years to come.

Houston has enjoyed a long history of remarkable growth and prosperity, and that success has rapidly accelerated in the last decade. **We are a city of opportunity.**



## What Makes a Great City?

The Houston Next strategy centers around the key characteristics of a great global city. When we look at the leading cities of the world, they share three common characteristics. A great city:



These are simple and noble aspirations, but not easy to accomplish or sustain. That's why the mark of any great city is exceptional civic leadership that leads a city to future success.

The Houston Next strategy and campaign will empower the region's business leaders, through the Greater Houston Partnership, to accelerate Houston's progress at the intersection of these three key areas of impact to ensure Houston continues to advance as a great global city.





## Growing Houston's Economy

In 2018, the Partnership and its regional allies assisted in the creation of 11,085 jobs and \$2.8 billion in capital investment in the region with 20 projects. Foreign direct investment projects accounted for 60 percent of the Partnership-assisted capital investment in the region.

### THE PARTNERSHIP WORKED TO SUPPORT 20 PROJECTS IN THE HOUSTON REGION IN 2018.

Acclara

AQ Lighting

Atco Structures & Logistics

Bayport Polymers

Coca-Cola Southwest Beverages

Coca-Cola Southwest Beverages (Arca Continental) broke ground on a 1 million-square-foot state-of-the-art bottling production and distribution center, the first new Coca-Cola bottling plant in the U.S. in ten years.

Fresh Del Monte Foods

Hewlett Packard Enterprise

Hewlett Packard Enterprise announced construction of a new corporate campus for its digital consulting, cloud computing, and enterprise servers business including HPE's IOT Labs and Digital Technology Demonstration Center at CityPlace in Spring, supporting 2,700 jobs.

INEOS

JSW USA

JSW USA invested \$500 million to construct one of the nation's most technologically advanced, vertically-integrated steel mills in Baytown, supporting 1,697 jobs.

Kaneka

Oleon

Oxiten USA

PROS

Toshiba International

TransCanada

Sun Noodles

SABIC

Waste Management

Waste Management relocated and expanded its headquarters in downtown Houston, adding a corporate innovation and digital technology platform leveraging data analytics, machine learning, and artificial intelligence to transform its global logistics and supply chain operations, supporting *more than 500 jobs*.

Weatherford

Ymer Technologies





**THE PARTNERSHIP WORKED TO SUPPORT MORE THAN \$2 BILLION IN NEW CAPITAL INVESTMENTS THAT BOLSTERED HOUSTON'S POSITION AS THE ENERGY CAPITAL OF THE WORLD**

- Bayport Polymers announced **\$1 billion joint venture** between Paris-based Total SA, Calgary-based Nova Chemicals Corp. and Vienna-based Borealis AG in Pasadena, supporting 330 jobs.
- SABIC expanded its North American Headquarters in Houston, supporting **200 jobs** in West Houston.
- INEOS **invested \$273 million** to add world-scale polymers capacity to its production operations in Pasadena, supporting **441 jobs**.

**ADVANCEMENTS IN CORPORATE INNOVATION AND DIGITAL TECHNOLOGY ARE HELPING TO DIGITIZE AND TRANSFORM HOUSTON'S TRADITIONAL INDUSTRIES**

- Flat Iron opened its second **software and data science bootcamp** in Houston, only second in the U.S., as part of the WeWork family of companies.
- Google Cloud Energy inked new deals with Tudor, Pickering, Holt & Co. and Anadarko as **digital tech firms expand their reach in Houston**.
- Houston Exponential, formed in 2017 with help from the Partnership, **raised \$25 million** for the HX Venture Fund.



## Advancing a Great Global City

In 2018, the Partnership hosted 165 inbound delegations from 40 countries and conducted eight international trade missions, including two with Mayor Sylvester Turner to South America and India.

The organization conducted 330 briefings and produced 870 trade matches to create regional jobs, attract investment and expand trade. Foreign direct investment projects accounted for 60 percent of Partnership-assisted capital investment in the region.

## Highlights

The Partnership was pleased to host the **World Bank's Chief Procurement Officer, Enzo de Laurentis**, and engaged with our region's EPC companies to understand global business opportunities funding by the bank

The Partnership hosted **Elizabeth Erin Walsh, Director General for Global Market U.S. Department of Commerce**, to the first Business Beyond Borders event with heads of US trade teams in Japan, Taiwan, China, Korea and India

### MEXICO

In February, the Partnership attended the 7th round NAFTA re-negotiations roundtable with members of the private sector in Mexico City. In May, the Partnership hosted a private breakfast featuring Carlos Alberto Treviño Medina, CEO of Pemex, during the 2018 Offshore Technology Conference. This annual program highlights PEMEX's role as a key player following the 2013 Energy Reform, allowing foreign companies to invest in Mexico. In September, the Partnership held a Mexico Energy Task Force Forum focused on the implications on trade and energy policy following Mexico's presidential election.



### CANADA

In January, the Partnership attended the 6th round of NAFTA re-negotiations roundtable with members of the private sector in Montreal. In June, the Partnership visited key trade and investment allies in Calgary during the Global Petroleum Show with Texas Secretary of State, Rolando Pablos.



### CHILE, PERU AND ARGENTINA

In July, the Partnership and Mayor Sylvester Turner led a trade and investment mission to Chile, Peru and Argentina. The mission included a week of high-level meetings with government officials and business leaders. The main themes for the mission were energy, innovation, logistics, tourism and resiliency.





**INDIA**

In November, the Partnership and Mayor Sylvester Turner led a trade and investment mission to Mumbai and New Delhi, India. The mission included a week of high-level meetings with government officials and business leaders. The main themes for the mission were innovation, energy, IT, aerospace, healthcare, and tourism.




**CHINA**

The Partnership played an active role in the US-China trade negotiations, submitting trade policy letters and official feedback to the Department of Commerce on behalf of Houston's business community. The Partnership also hosted the Chinese Ambassador to the U.S. and a series of events on the impact of tariffs on Houston's economy. In November, the Partnership led a trade and investment delegation to China. Houston was the only U.S. city represented in the first China International Import Expo (CIIE), where the Partnership was hosted by the Mayor of Shanghai.

**VIETNAM**

In September, the Partnership co-hosted a high-level Vietnamese delegation, headed by five Governors and Deputy Governors from leading cities and provinces in Vietnam, to explore potential cooperation and investment opportunities between Houston and Vietnam. The delegation was joined by a business group from the Youth Business Association, Saigon Entrepreneurs Association and leading businesses from Vietnam.



-  Inbound delegation
-  Outbound delegation
-  FDI announcement



## Accelerating Innovation in Houston

### HOUSTON'S INNOVATION ECOSYSTEM

While a center of corporate and institutional innovation in areas such as energy, space and life sciences, Houston has lagged in venture capital-backed startup activity. The paradigm has shifted with the launch of Houston Exponential in 2017 and the closing of the first HX Venture Fund in October 2018.

Leveraging Houston's large supply of young talent and our community's entrepreneurial mindset, a host of accelerators and co-working spaces have continued to make strides including Station Houston, TMCx, JLABS @TMC, The Cannon, WeWork, AT&T Foundry, University of Houston's RED Labs, and Fannin Innovation Studio. These hubs of innovation have been creating momentum and building density for more startups.

### HOUSTON EXPONENTIAL & HX VENTURE FUND

The Partnership's Innovation Roundtable, chaired by Gina Luna, worked closely with Accenture to craft a strategic plan to boost Houston's innovation economy. A key step in implementing the strategic plan was the formation of Houston





Exponential. As the organization enters its second year, it announced the first closing of the HX Venture Fund.

The Fund is Houston's first venture capital fund of funds and closed the first round with \$25 million in commitments from nine leading Houston companies including Insperty, Chevron, Shell, Quanta Services, Westlake Chemical, The Plank Companies, PROS, HEB and Camden.

The HX Venture Fund is a significant component of Houston Exponential's mission of positioning Houston as a top-10 innovation ecosystem by 2022. The HX Venture Fund aims to achieve an attractive return for investors, appeal to leading venture capital firms to offer their expertise and risk capital to the region and create a pathway for innovation and information to flow among corporations, startups and innovators.

Houston Exponential will continue to convene key players in the innovation ecosystem to focus on near and long-term strategies needed to transform Houston into a world-leading hub for innovation.

#### HOUSTON'S INNOVATION DISTRICT

In April, Houston Mayor Sylvester Turner and Rice University President David Leebron announced plans for a new innovation district in Midtown that will transform a 9.4-acre site, anchored by the former Sears building, into a hub designed to bring together the

area's entrepreneurial, corporate and academic communities into collaborative spaces and programs.

The historic Sears building is centrally located near downtown Houston, the Texas Medical Center and most of Houston's institutions of higher education. The district will combine a variety of commercial uses with housing, restaurant and entertainment, iconic public space and best-in-class infrastructure. Leaders of many of the major educational institutions in the region, as well as corporate leaders in the health care, energy, industrial and technology industries, have indicated their desire to participate in this centrally located innovation district.

In developing these plans, Rice worked closely with the Partnership, the City of Houston, Houston Exponential and Station Houston. Station Houston will serve as incubator and amenity program operator and will work on three key initiatives:

- **Connecting ecosystem players** to drive high-impact collaborations
- **Supporting entrepreneurs and the innovation community** through a range of programs, workshops and events
- **Working with academic institutions** and other groups to develop and connect Houston's digital workforce





## Building a Strong Workforce

Greater Houston's people and collective talent are the region's greatest assets. UpSkill Houston was launched four years ago to strengthen and grow Houston's regional economy by attracting Houstonians to careers that do not require a 4-year degree. UpSkill has continued to collaborate with industry and employers to ensure a supply of qualified talent needed to grow businesses and Houston's 21st century economy. In addition, UpSkill has been working with regional school districts and community organizations to ensure that people have the skills needed for good jobs in our regional economy.

### "MY LIFE AS" VIDEO SERIES

The business community and employers stepped up to help us engage workers to tell personal stories through research-based videos that aim to inspire students and parents to consider UpSkill careers. The "My Life As" video series enhances and strengthens our *What Are You Up For?* Campaign to inspire students to explore careers in Houston's high-growth technical industries.

Over the 2018-2019 school year, these inspiring video testimonials of young technical workers are being made available in at least seven school districts and leveraged through social media with the potential to reach large numbers of young people and influencers.



### What Are You Up For?

UpSkill Houston kicked off the year with a student awareness campaign: *What Are You Up For?* The campaign, which focuses on grades seven to twelve, targeted nearly 150,000 students in key independent school districts (Aldine, Alief, Houston, and Pasadena) and sought to:

- **Inspire students** to explore careers in UpSkill Houston's high-growth industries
- **Increase awareness** about Houston's high-growth industries and careers
- **Support school counselors and teachers** as they encourage students to explore technical careers
- **Provide family and friends of students with information** and tools to guide students

Over the 2017–2018 school year, the campaign reached:

1,200	+	5,000	+	18,000
leaders, counselors and teachers		students through presentations		students reached with information materials







### UPSKILL WORKS CONFERENCE

In June 2018, UpSkill Houston hosted its inaugural UpSkill Works conference featuring a fireside chat with Rob Kaplan, CEO of the Federal Reserve Bank of Dallas, and led by Dan Gilbane, UpSkill Houston Chair. More than 300 people attended the conference, which sought to deepen and broaden the engagement of business leaders in the work of UpSkill Houston. Kaplan reminded us that our regional economy will continue to grow because of improving the skills of workers and increasing productivity. He also reflected that technology-enabled disruption will continue to change the skills needed by our workforce.

### UPSKILL INDUSTRY COUNCILS

UpSkill Houston continues to build out employer-led industry councils in Houston's key industry sectors. The existing industry sector councils are building momentum focused on achieving results and improving the talent pipeline for employers in the industry sector. To date, UpSkill Houston has actively engaged 90 employers over four key sectors including Petrochemical, Commercial and Industrial Construction, Health Care, and Transportation.

### ADDITIONAL UPSKILL HIGHLIGHTS

- Worked with the **Mayor's Hire Houston Youth** program to encourage businesses and employers to provide more than 7,500 paid summer internships to youth and young adults
- Hosted a delegation of business and community leaders from the **Tampa Bay Partnership** who visited Houston to learn from the employers and partners of UpSkill Houston
- Featured in the **U.S. Chamber of Commerce's "Building the Competitive Workforce of the Future"** display showcased during its annual conference
- Hosted its third annual **Regional Faculty Summit**, with over 200 faculty and educators from 10 local college systems in attendance





## Pursuing Sound Public Policy

The Partnership depends on the expertise of our members to advocate for strong public policy at all levels of government that will make Houston even greater.

### POLICY COMMITTEE OVERVIEW

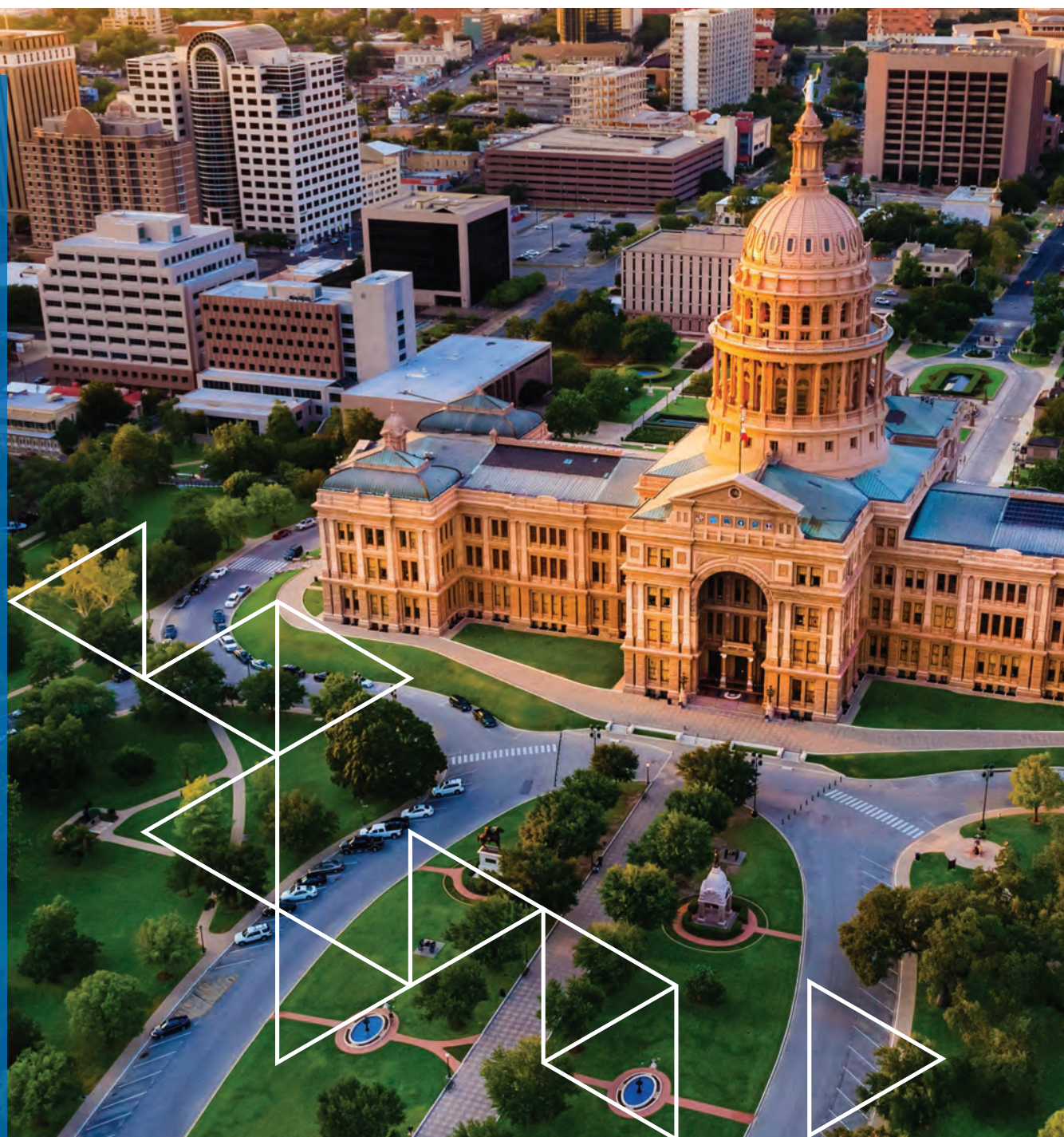
The Partnership's Policy Advisory Committees convene business and community leaders to discuss issues critical to the growth and vitality of the Houston region and identify potential solutions. The work of the committees guides the positions of the Partnership and determines when advocacy is needed to encourage action.

### BUSINESS ISSUES

The Business Issues Advisory Committee analyzed two threats to Houston's business climate: firefighter pay parity and mandatory paid sick leave. The committee opposed the fire union's pay initiative due to the damage the measure would cause to the City's fiscal health. The committee also opposed local ordinances that infringe on private employer-employee agreements related to paid sick leave.

### EDUCATION

The Education Advisory Committee determined that public school finance should be its top priority and identified potential solutions for a system that provides adequate, effective, and equitable funding for our children and for the creation of a skilled workforce.







## ENERGY

The Energy Advisory Committee worked to raise awareness of the impact of harmful trade policy on the energy industry. The committee also developed the Partnership's platform for supporting a fair and expeditious eminent domain process in Texas.

## ENVIRONMENT

The Environment Advisory Committee worked on improving air quality in the Houston region and solidified the Partnership's position of supporting funding for the Texas Emissions Reduction Plan. The committee also advocated for more funding to the Houston region through the Volkswagen Settlement Mitigation Fund.

## HEALTH CARE

The Health Care Advisory Committee discussed several issues, including rising health care costs; technology's role and its adoption in evolving patient care; and building resiliency around the provision of health care to Houstonians during and following a disaster.

## HIGHER EDUCATION

The Higher Education Advisory Committee, supported by the Boston Consulting Group, analyzed Houston's higher education ecosystem in comparison to other major metros and convened leaders from the region's higher education institutions to discuss potential solutions for growing and strengthening regional institutions.

## INFRASTRUCTURE AND RESILIENCY

The Infrastructure and Resiliency Advisory Committee played a prominent role in informing and coordinating advocacy efforts related to securing local, state and federal funds for flood mitigation. The committee supported two local measures: the authorization of \$2.5 billion in bonds for Harris County Flood Control District mitigation projects; and the passage of ReBuild Houston, the City of Houston's dedicated street and drainage fund.

## QUALITY OF PLACE

The Quality of Place Advisory Committee, working closely with Central Houston Inc., evaluated potential greenspace projects resulting from the North Houston Highway Improvement Project.

## TRANSPORTATION

The Transportation Advisory Committee identified and prioritized the infrastructure and mobility issues of the region, focusing on port infrastructure development, methods for congestion alleviation, and critical funding needs.



## Advocating for a Greater Houston

### PUBLIC SCHOOL FINANCE

The Houston region cannot have a productive, successful workforce without a strong public education system. The Partnership is laying the foundation for long-term improvements to the pre-K–12 education system, starting with how Texas funds public education. To better inform the business community on this topic and to draw a road map to meaningful change, the Partnership launched a Public School Finance workshop series in September that will continue through January 2019. Workshops discussed:

- The **historical perspective** and current challenges of school finance
- **How public school funding works** and where the money comes from
- **The business perspective** on school finance
- Past legislative action and **possible long and short-term solutions** to school finance

### Members engaged with **public education experts:**

- **Jimmie Don Aycock**, Former Texas House Public Education Committee Chairman
- **Todd Williams**, Chairman and Executive Director of The Commit Partnership
- **Cheryl Pace**, Texas Taxpayers and Research Association
- **David Thompson**, Thompson & Horton LLP

Upon completion of the workshop series, the Partnership will establish key principles of school finance reform and priority policy initiatives for the 86th Texas Legislative Session and beyond.



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### OPEN INTERNATIONAL TRADE

As the region's leading business organization, the Partnership has continued to communicate the importance of free trade to the Houston region and Houston's outsized impact on the national economy. This year, the Partnership collaborated with the Hobby School of Public Affairs at the University of Houston and quantified industries, jobs and economic activity that retaliatory tariffs threaten. In coordination with key business groups, including the National Association of Manufacturers, the American Petroleum Institute and the U.S. Chamber of Commerce, the Partnership supports trade policies that help Houston trade freely and competitively.

### FUTURE OF TEXAS



A new program for 2018, Future of Texas gave members the opportunity to meet and discuss policy objectives and insights ahead of the 86th Legislative Session with 11 elected officials.

- **Comptroller Glenn Hegar**
- **Senator Paul Bettencourt**
- **Senator Joan Huffman**
- **Senator Larry Taylor**
- **Representative Carol Alvarado**
- **Representative Dennis Bonnen**
- **Representative Sarah Davis**
- **Representative Todd Hunter**
- **Representative Eric Johnson**
- **Representative Tan Parker**
- **Representative Senfronia Thompson**
- **Representative John Zerwas**



## Building a Resilient Houston

In the aftermath of Hurricane Harvey and the region's recent flood events, building extreme weather resiliency is increasingly critical. In response, the Partnership convened regional stakeholders, government officials and business leaders to align goals and work together to support short-term rebuilding and long-term mitigation efforts with:

Harris County Judge **Ed Emmett** and City of Houston **Mayor Sylvester Turner**

U.S. Secretary of Housing and Urban Development **Ben Carson**

Texas Land Commissioner **George P. Bush**

White House Office of Management and Budget Director **Mick Mulvaney**

On the one-year anniversary of Hurricane Harvey in August, the Partnership hosted **Back to Business: One-year Post-Harvey**, where officials shared an update on the region's rebuilding and resiliency efforts with 150 business and community leaders in attendance and 1,000+ online viewers.

**150 & 1,000+**  
business and community leaders      online viewers







THE PARTNERSHIP WORKED WITH LOCAL OFFICIALS TO BUILD ROBUST SUPPORT FOR FUNDING IN AUSTIN, WASHINGTON D.C. AND WITH LOCAL VOTERS FOR A MORE RESILIENT HOUSTON. RESULTING IN:

More than \$15 billion in **federal funding** for Hurricane Harvey recovery and flood mitigation for the Houston region

The overwhelming passage of the \$2.5 billion **Harris County Flood Control District bond**, approved by 86% of voters

74% voter approval of **the ReBuild Houston program**, which dedicates funds for badly needed infrastructure improvements to neighborhood streets and drainage systems

The **direct allocation of Hurricane Harvey recovery funds** awarded to Houston and Harris County from the Department of Housing and Urban Development

Participation in the planning phase for Houston's joining the **100 Resilient Cities Network**, a global effort started by the Rockefeller Foundation to help cities build urban resilience

The Partnership Engagement in the public comment process for the **Texas Coastal Barrier System**



## Engaging Our Members

Partnership member companies are as diverse as the region's demographic make-up itself, representing a broad range of industries and occupations that do business across the country and around the world.

**>1,050** member companies + **1/5** Members represent one-fifth of the region's workforce + **55%** of our member companies are small businesses (fewer than 50 employees)

### ADVANCING HOUSTON THROUGH ENGAGEMENT

Partnership membership activities offer quality networking, a platform to address regional issues, and an opportunity to connect people to valuable research and information to build stronger businesses. In 2018:

- 9,479 business and community leaders attended **18 major events**
- 5,000+ gathered at Partnership Tower for **Partnership-hosted events**
- 1,214 members participated in **25 council meetings**
- 2,764 members participated in **97 committee meetings**
- 3,649 members participated in **74 program sessions**



Business  
Beyond Borders



Business  
Development



Executive Women's  
Partnership



Future of Texas



HYPE (Houston  
Young Professionals  
& Entrepreneurs)



Small Biz Matters



Women's Business  
Alliance



## GETTING INVOLVED

When a company joins the Partnership, their employees get engaged with the Partnership through events, programs, councils, committees, and information exchange. The Partnership offers regular sessions to help members learn how to make the most of their membership:

### Connection Zone

The Connection Zone is an on-site information booth to help our members make the most of their membership. The Partnership's friendly member engagement staff is on-hand at all Signature Events and most events at Partnership Tower to provide real-time assistance and ensure member companies are getting plugged in to the right people, places and events at the Greater Houston Partnership.

### Membership 101

Membership 101 is offered quarterly for new and prospective members to learn about the Partnership's mission and build an engagement plan that fits their particular business interests.

### Ambassadors

The Partnership's Ambassadors are cornerstone to the retention and engagement of our new members. These vital volunteers work primarily with small to medium-sized businesses in their first years of membership, guiding their member journey and immersing them in Partnership programs and resources. Congratulations to the 2018 Lifetime Ambassadors.

## HOUSTON NEXT: AN ERG SUMMIT

In October, the Partnership convened more than 300 business leaders, diversity and inclusion officers, HR executives and ERG leaders at the inaugural Houston NEXT: An ERG Summit to address the region's workforce needs and to discuss how we can create thriving ERGs and retain top talent. The interactive event featured presentations, panel discussions, and breakout pods, where attendees shared best practices, struggles, recruitment/retention needs and suggestions on how we can improve our corporate cultures as a community.

## PARTNERSHIP PUTS FOCUS ON SMALL BUSINESS

Small businesses play a key role in the growth of Houston's economy. To support this critical business community for the city and region, the Partnership launched valuable resources and opportunities for high-growth, small enterprises to make valuable business connections. During National Small Business Week, the Partnership launched Small Biz Matters, including live workshops, luncheons and on-demand digital programming. A new member journey, Houston Small Biz Connect, was also launched and will offer new membership benefits including business development, discounts and branding opportunities to businesses with 50 or fewer global employees.







## Special Events and Programs

### STATE OF THE SENATE

United States Senator John Cornyn delivered the 2018 State of the Senate address, offering attendees a thorough perspective on disaster relief, tax reform and trade policy along with insight into the collaboration between his office and the Houston region.

### STATE OF THE CITY

Mayor Sylvester Turner delivered his third State of the City address where he encouraged the business community to “be bold, be visionary,” to advance key initiatives important to the health and prosperity of our city and region, including innovation and resiliency.

### STATE OF THE COUNTY

Judge Ed Emmett’s State of the County address highlighted the collaboration and partnerships between government and the private sector that have become a hallmark of the region, which has allowed Harris County to become stronger and ready to face the future.

### STATE OF ENERGY

2018’s State of Energy event featured Jeff Miller, Halliburton President and CEO in a discussion moderated by Maynard Holt, CEO, Tudor, Pickering, Holt & Co. The event highlighted Houston’s ability to evolve and drive technology thanks to the corporate infrastructure and knowledge that resides in our region.

### STATE OF TEXAS MEDICAL CENTER

Texas Medical Center President and CEO Bill McKeon shared updates on the notable strides in innovation and life sciences being made in the world’s largest medical complex in his 2018 address.

### STATE OF THE PORT

Port Houston Chair Janiece Longoria provided updates on the regional economic powerhouse in her final Partnership State of Port presentation, addressing future growth opportunities and capital investment plans for the Port of Houston.







## Rise to the Top

The Partnership's Women's Business Alliance (WBA) celebrated International Women's Day with its seventh annual Rise to the Top luncheon as four female executives held candid conversations on the challenges and triumphs of succeeding in today's business environment. The conversation, moderated by Misty Mousa-Lanza, Partnership and Business Development, Univision Houston, included panelists:

- **Shauna Clark**, Head of Employment and Labor, United States, Norton Rose Fulbright
- **Luz Damaris Rosario**, General Manager, Goya Foods Texas
- **Lisa Darling**, Head of School, The Awty International School
- **Carolyn Rodz**, Founder, Alice

## Soirée

A fantastical evening was had by all at the Partnership's annual Soirée, chaired by Cindy Yeilding, BP America. Hotel



ZaZa provided the perfect backdrop for Houston Through the Looking Glass, featuring idyllic themed rooms including the Bayou City's Garden of Live Flowers and the Mad Hatter's International Tea and Dessert Room. Those wanting to challenge the clock also enjoyed a wondrous Cheshire Cat After Party.

## Golf Classic

The 23rd annual Golf Classic at Carlton Woods was another major success with more than 30 teams participating. Congratulations to Dan Bellow of JLL for his CEO Cup win and special thanks to our honorary chair, Blake Pounds, Accenture, Managing Director, Houston.

## Thought Leader Series

2018's Thought Leader, Mauricio Gutierrez, President and CEO, NRG Energy engaged with Houston Texans' President Jamey Rootes in a conversation on how he's helped build the company from a regional wholesale generation business to a national, Fortune 500, diversified energy company in the digital era.





## Marketing the Houston Region

The Partnership leverages its role as the voice of the business community to influence media coverage around key issues affecting Houston and the regional economy.

During 2018, the Partnership, along with our thought leaders and research data, were featured in more than 350 stories in local, national and international media outlets. Significant media campaigns included Houston's trade missions to South America and India, Houston Exponential's Venture Fund announcement, as well as messaging around trade and tariffs and public education.

Through social media, the Partnership reached 106,000 fans and logged more than 36,000 engagements via nearly 1,500 posts. Houston.org and other Partnership-related websites recorded more than 225,000 visits during the 12-month period, a 22% increase from 2017.



*In 2018, the Partnership developed a new website to better tell the organization and Houston's story.*







## Partnership in the News

### HOUSTON BUSINESS JOURNAL

#### Silicon Bayou: Why some tech companies are choosing Houston over California or Austin

"As we look at our growth plans, in order to become a truly global technology provider for the energy industry, the depth of both investment and talent will be found in Houston," said Nouman Ahmad, CEO of energy tech company Valdiere.

### HOUSTON BUSINESS JOURNAL

#### Winds of Change: How the energy capital of the world needs to adjust to keep the title

"Houston doesn't really need to capture the bleeding edge of technology. It should instead chase the businesses focused on implementing that technology in large-scale projects," Partnership CEO Bob Harvey said. "And for the most part, that's what the city has done."

### SMART CITIES DIVE

#### A year on from hurricane, Houston leaders see Harvey as 'the new baseline'

Hurricane Harvey, in many respects, did more to pull this community back together than just about anything I've seen in my lifetime." – Bob Harvey, President and CEO of the Partnership

### HOUSTON BUSINESS JOURNAL

#### Chinese tariffs would affect \$3.34 billion in Houston exports

"What this does is it complicates things, it removes opportunities, it forces the companies to sharpen their pencils a little more... It creates uncertainty," Partnership Chief Economist Patrick Jankowski said. "I'm hoping that, in the end, cooler heads will prevail."

### FORBES ARGENTINA

#### Houston, we have an opportunity

"We have a lot to share with Argentina and we bring the new energy business standards globally: there are many opportunities for traditional businesses and also for alternative sources." – Horacio Licon, vice president of International Investment & Trade

### HOUSTON CHRONICLE

#### Offshore recovery gains momentum

Houston is the center of the world's offshore drilling sector..."This the last stage of the recovery," said Patrick Jankowski, senior economist with the Greater Houston Partnership. "When you start to see activity in this sector, you know the bust is over."



## Supporting Data Driven Decisions

Strong data is the foundation of sound business and policy decision-making. The Partnership provides quality, objective data and analysis to help its members and the business community at-large make informed economic and policy choices. Through in-depth research reports and analysis of key economic indicators, the Partnership has built a reputation as a trusted resource for critical economic and demographic information. The Research team also provides analysis and problem-solving support to aid in the broader organization's efforts around economic development, business recruitment, public policy and other internal functions.

### IN 2018, THE PARTNERSHIP PRODUCED:

**4** Four **major print publications**  
(Houston Facts, Houston Employment Forecast, Houston Economic Highlights and Global Houston)

**4** Four **quarterly Houston Briefs:**  
Talking Points online publications

**12** 12 **Economy at a Glance**  
**online publications**

**12** **Monthly analysis** of Key Economic Indicators including home sales, employment, vehicle sales, foreign trade, oil and gas trends, construction activity, inflation, port and airport traffic, and more.



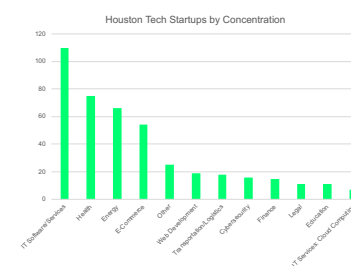




## Case Study

**Innovation Inventory** – As part of the Partnership's collaborative effort to foster the region's innovation ecosystem, The Research team developed a framework to understand and measure digital innovation in Houston. The effort included building a comprehensive database of technology startups as well as an online, interactive digital tech map of the region. This new data is critical to guiding Houston's plan to attract new digital tech companies to Houston.

### DIGITAL TECH PRESENCE : SUMMARY



IT Software/Services	26%
Health	18%
Energy	15%
E-Commerce	13%
Other	6%
Web Development	4%
Transportation/Logistics	4%
Cybersecurity	4%
Finance	4%
Legal	3%
Education	3%
IT Services: Cloud Computing	2%
Total	427

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### DIGITAL TECH PRESENCE: ENERGY



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# Financials

## Combined Statements of Financial Position

As of December 31, 2018 and 2017

ASSETS	2018 Estimated	2017 Audited
Cash and cash equivalents	\$4,697,699	\$6,363,797
Accounts receivable, net	226,405	478,019
Investments	3,609,824	1,864,175
Pledges receivable, net	4,694,496	3,776,058
Prepaid expenses and other assets	170,634	106,287
Property, net	4,804,879	5,030,333
<b>Total Assets</b>	<b>\$18,203,937</b>	<b>\$17,618,669</b>

### LIABILITIES AND NET ASSETS

LIABILITIES	2018 Estimated	2017 Audited
Accounts payable and accrued expenses	\$516,386	\$752,265
Deferred membership revenue	3,426,290	3,123,662
Other deferred revenue	169,247	159,710
Lease liability	251,127	151,086
<b>Total Liabilities and Net Assets</b>	<b>\$4,363,050</b>	<b>\$4,186,723</b>

NET ASSETS	2018 Estimated	2017 Audited
Unrestricted	6,450,645	7,044,055
Temporarily restricted	7,390,242	6,387,891
<b>Total Net Assets</b>	<b>13,840,887</b>	<b>13,431,946</b>
<b>Total Liabilities and Net Assets</b>	<b>\$18,203,937</b>	<b>\$17,618,669</b>

For a complete copy of the audited financial statements for the year ending Dec. 31, 2017, please contact the Finance Office at 713-844-3667.







## Combined Statements of Financial Activities and Changes In Net Assets

Years Ended December 31, 2018 and 2017

REVENUE	2018 Estimated	2017 Audited
Membership dues	\$8,392,980	\$8,178,751
Event registration and sponsorship fees	3,049,759	3,489,813
Publications, merchandise sales, and other revenue	65,590	100,219
Investment return, net	(99,084)	437,541
Net assets released from restriction	4,501,273	4,527,713
<b>Total Revenue</b>	<b>\$15,910,518</b>	<b>\$16,734,037</b>
<b>EXPENSES</b>	<b>2018 Estimated</b>	<b>2017 Audited</b>
Personnel costs	9,790,387	9,675,059
Program services direct costs	3,453,816	4,152,651
General, administrative, and overhead	2,616,159	2,691,342
Depreciation	571,724	529,987
Fundraising	71,842	3,501
<b>Total Expenses</b>	<b>\$16,503,928</b>	<b>\$17,052,540</b>
Change in Unrestricted Net Assets	(593,410)	(318,503)
Change in Restricted Net Assets	1,002,351	(3,928,974)
Net Assets, beginning of year	13,431,946	17,679,423
<b>Net Assets, End of Year</b>	<b>\$13,840,887</b>	<b>\$13,431,946</b>

The financial statements reflect the combined balances and results of activities of the Greater Houston Partnership, Inc., and the Greater Houston Partnership Foundation.

Financial statements and the independent auditor's report for the year ending Dec. 31, 2018, will be available upon the completion of the audit in the second quarter of 2019. Estimates shown above are subject to revision.



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