

GREATER HOUSTON
PARTNERSHIP
ANNUAL REPORT
2016





JAMEY ROOTES, CHAIR GREATER HOUSTON PARTNERSHIP

What a year to be a champion for Houston! We have proudly displayed our city on the global stage this year, and, as we revisit 2016, it's clear that we have made a significant impact by telling Houston's story to people across the region and around the world: this is the best place to live, work and build a business.

THIS IS THE BEST PLACE **TO LIVE, WORK AND BUILD A BUSINESS.**

When I look at 2016, I think about all of the great work we've done together to showcase our city worldwide. We hosted the NCAA Final Four, and we were the first U.S. city to host the Copa América Centenario, the oldest international continental soccer competition. We completed an exciting and historic trade mission to Havana, Cuba, and visited Mexico City to enhance trade ties with government officials and business counterparts in Mexico, leaving a lasting impression with the first-ever Monday Night Football game to be played outside of the U.S. between our own Houston Texans and the Oakland Raiders.

We also created a new permanent showcase for Houston by introducing our new receiving and convening space at Partnership Tower – Houston's front door! We are sincerely grateful to our five Partnership Tower ambassadors for their support in moving our vision forward. We now have an amazing space to receive business leaders and dignitaries from around the globe, and our new workspace is also designed to bring together our member volunteers to generate the new ideas that will accelerate everything that we do.

None of our accomplishments this year would have been possible without our members – our true champions for Houston. Thank you for your dedication to the Partnership now and as we continue to show the world that if you work hard and dream big, anything is possible in Houston!



BOB HARVEY, PRESIDENT AND CEO GREATER HOUSTON PARTNERSHIP

2016 was a very busy year, and we sincerely appreciate the time and resources our members dedicated to the Partnership. Starting with our move to Partnership Tower, I believe our new space sends the message that the Partnership is the first stop – the front door – for visiting executives, inbound trade missions and companies considering Houston. It also signals that we are an impact player on issues that matter the most to Houston.

WE SINCERELY APPRECIATE THE TIME AND RESOURCES OUR MEMBERS DEDICATED TO THE PARTNERSHIP.

Your hard work as members has been instrumental in a number of key wins for our organization this year. For example, the members of the Municipal Finance Task Force dedicated two years to understanding the City of Houston's finances, and we were able to assist Mayor Turner as he developed his pension reform plan. We continued to advance our priorities in education and skills training through our UpSkill Houston and Early Matters Initiatives. Houston added jobs despite a year of challenges in the energy sector, demonstrating just how diversified our economy has become. We continued our work with the Global Cities Initiative: A Joint Project of the Brookings Institution and JPMorgan Chase and launched our Metro Export Plan in April to help small to medium-size businesses understand the ins and outs of exporting and connecting to resources within the community. Notably, the Brookings Institution identified Houston as one of 19 "Knowledge Capitals" around the globe, highlighting our talented workforce and elite research universities that together drive our regional economy and make us a global influence.

As we prepare for another year, I look forward to working with our members on the opportunity to create the next vision for Houston and position the Partnership as a leader and convener in all future efforts that make Houston greater.

At the Partnership, we promote Houston to businesses from around the world and to talented young professionals seeking a place to build a career. We also advocate for our region at the local, state and federal levels. We all know that Houston is an incredible place to live. From our parks and green space, to our culinary and cultural scene, the options here truly are limitless.

At the 2016 Annual Meeting, the Partnership outlined its commitment to our role as champions for Houston. The Partnership has made great progress in its work of making Houston one of the world's best places to live, work and build a business. Now, we are getting the word out, and the eyes of the world are on Houston.





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HAVING A GREATER IMPACT

Houston is **one of the greatest cities in the world**. Partnership Tower is Houston's **new front door to members, dignitaries and executives** from across the region and around the globe.

For our members, Partnership Tower offers a **first-class receiving and convening space** worthy of the incredible work we do to make Houston greater.

For the broader community, Partnership Tower is a destination that reflects the vibrant, **innovative city Houston is today**.



13,000 sq. ft. (APPROXIMATE)
of receiving/convening
space

2,030-sq.-ft.
terrace overlooking
Discovery Green



6,420-sq.-ft.
collaboration space

Host events of up to
450 attendees



2,175-sq.-ft.
lobby and reception area

#HouWall, Houston's first
Instagram wall



HOUSTON IS ONE OF THE GREATEST CITIES IN THE WORLD.

PARTNERSHIP TOWER AMBASSADORS



Partnership Tower Ambassadors who made it possible.

Scott Prochazka, CenterPoint Energy; Elizabeth Killinger, Reliant, an NRG company; Robert C. Robbins, M.D., Texas Medical Center; Claudia Kreisle, Phillips 66; and John Nau, Silver Eagle Distributors.

We call them ambassadors because they are champions of Houston.



Always There.®





"WE CALL THEM **AMBASSADORS** BECAUSE THAT'S EXACTLY WHAT THEY ARE: **CHAMPIONS OF ECONOMIC DEVELOPMENT, GROWTH AND OPPORTUNITY** – NOT JUST IN HOUSTON AND THE REGION, BUT ALSO ON THE GLOBAL PLAYING FIELD. NOT JUST FOR TODAY, BUT ALSO FOR **A STRONG AND PROSPEROUS FUTURE.**"

JAMEY ROOTES, *Chair - Greater Houston Partnership,
and President, Houston Texans*

In 2016, the Partnership expanded its role as the region's leading authority on Houston economic and demographic trends. In June, the Partnership was the first in the region to suggest the economic downturn had ended.

"The worst may be over for the oil industry, which is welcome news since the broader economy has begun to show signs of stress." – "On the Cusp of a Recovery?" *Houston: The Economy at a Glance*, June 2016.

2017 HOUSTON EMPLOYMENT FORECAST

The Partnership forecasts the Houston metro area will create **29,700 net new jobs in 2017**, with growth in a number of non-energy and consumer-driven sectors offsetting modest continuing losses in sectors most closely tied to energy. The forecast calls for the strongest job growth in industries including, but not limited to: manufacturing, wholesale trade, finance and insurance, real estate and health care. Job losses are expected to continue in exploration and production, oil field services, construction and information.

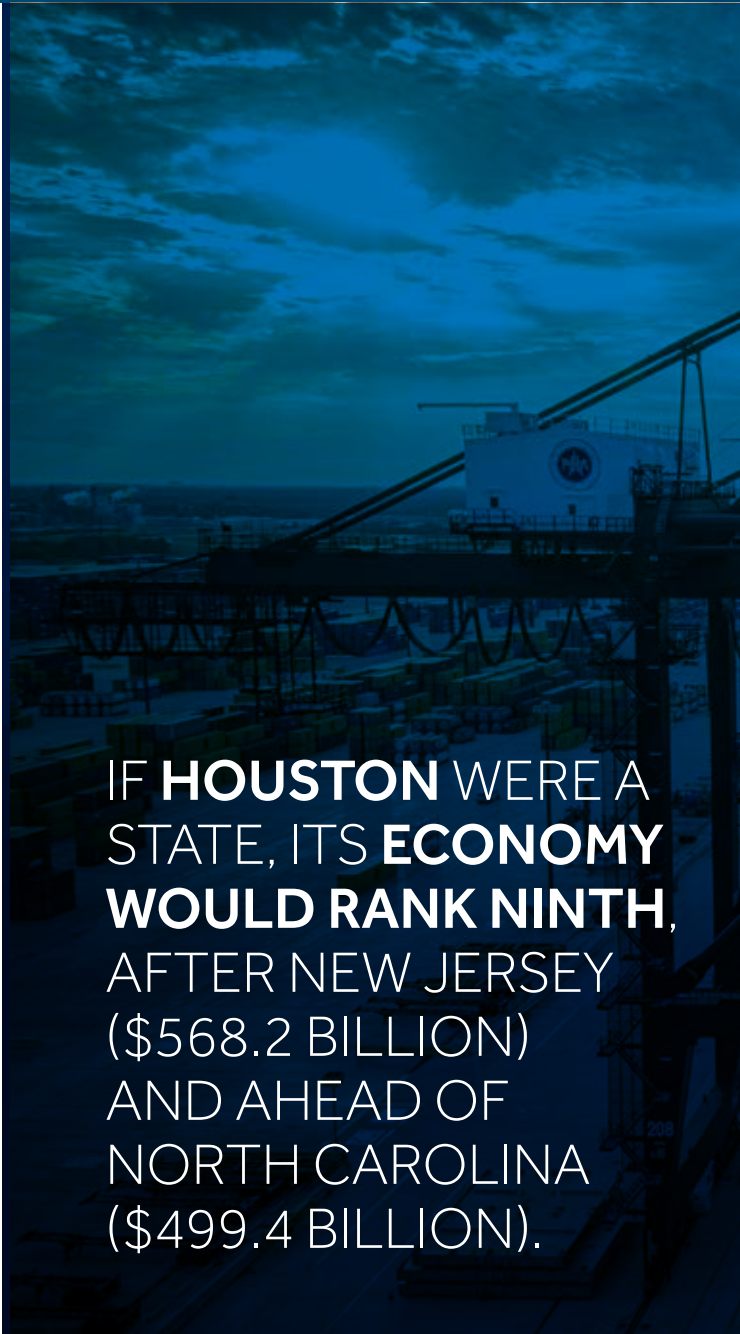
▼ SIGNALS THE DOWNTURN IS OVER:

WEST TEXAS INTERMEDIATE (WTI), THE U.S. BENCHMARK FOR LIGHT, SWEET CRUDE, **NOW TRADES OVER \$50 PER BARREL**. WTI TRADED AS LOW AS \$26 IN MID-FEBRUARY.

THE NUMBER OF DRILLING RIGS WORKING IN THE U.S. REACHED 658 BY YEAR'S END. **ONLY 404 RIGS, THE FEWEST IN RECENT HISTORY**, WERE IN THE FIELD IN MID-MAY.

AFTER 21 MONTHS BELOW 50, **THE HOUSTON PURCHASING MANAGERS INDEX HIT 51.1 IN OCTOBER AND 50.5 IN NOVEMBER**. READINGS ABOVE 50 SIGNAL PENDING EXPANSION; BELOW 50, CONTRACTION.

THE REGION **CREATED 16,100 JOBS IN THE 12 MONTHS** ENDING NOVEMBER 2016. ANNUALIZED GROWTH HAD SUNK AS LOW 3,200 JOBS IN MAY.



IF **HOUSTON** WERE A STATE, ITS **ECONOMY WOULD RANK NINTH**, AFTER NEW JERSEY (\$568.2 BILLION) AND AHEAD OF NORTH CAROLINA (\$499.4 BILLION).

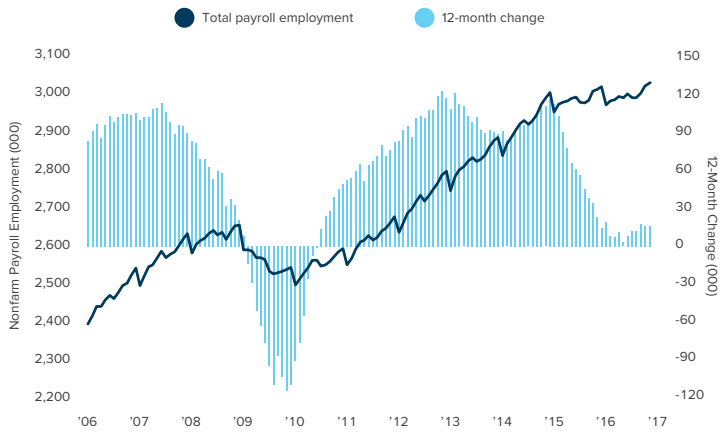


Photo credit: Port of Houston Authority

2016 HOUSTON ECONOMIC HIGHLIGHTS

From 2010 to 2014, Houston added more than 450,000 jobs. This period of phenomenal growth provided the momentum needed to sustain the region through the early stages of the energy downturn that began at the end of 2014. As oil prices and rig counts fell through 2015 and early 2016, Houston's year-over-year job growth began to slow, but never went negative.

HOUSTON'S TOTAL NONFARM PAYROLL EMPLOYMENT REACHED A NEW PEAK IN OCTOBER 2016.



Source: Texas Workforce Commission

The region added 15,200 jobs in 2015 and 16,100 jobs in the 12 months ending November 2016. In spite of the energy industry's worst downturn in almost 30 years, Houston managed to post a 12-month net job gains throughout this period. A strong U.S. economy, momentum from the previous economic boom, robust population growth, and the \$60 billion in petrochemical plant expansions have helped offset losses in upstream energy and manufacturing.

MORE BUSINESS ATTRACTION AND EXPANSION

In 2016, the Partnership and its regional allies assisted in the creation of 7,094 jobs and \$2.3 billion in capital investment in the region with 22 major company announcements.

THE PARTNERSHIP WORKED TO SUPPORT 22 PROJECTS IN THE HOUSTON REGION FOR 2016.

ABM Industries Incorporated

Alfred Talke Logistic Services

Amazon.com, Inc.

America Modern Green Development
Houston LLC

Confidential Project

Emerson Process Management Power &
Water Solutions, Inc

FedEx Ground Package System, Inc.

Galdisa, S.A. de C.V.

INEOS Americas LLC

Jungheinrich Lift Truck Limited

Kuraray America, Inc.

Lonza Inc.

LyondellBasell

Mahindra USA, Inc.

Mitsubishi Heavy Industries America, Inc.

OOGC America LLC

Preferred Freezer Services, Inc.

SBE Chemical Partners I LLC

Serta Simmons Bedding, LLC

Sinopec Group

Sumiden Wire Products Corporation

United Parcel Services, Inc.



AMAZON'S SEVENTH TEXAS FACILITY TO CREATE MORE THAN 1,000 NEW FULL-TIME JOBS.



In 2016, Amazon announced plans to open its seventh Texas fulfillment center in the Houston region. Amazon currently employs more than 10,000 full-time hourly associates at its five operating Texas fulfillment centers and plans to create 1,000 more full-time positions at the new Houston site. Elsewhere in the Lone Star State, Amazon currently operates fulfillment centers in Coppell, Haslet, Dallas, Fort Worth and Schertz. Amazon employees at the new 855,000-square-foot national fulfillment center in Houston will pick, pack and ship popular customer items, such as books, electronics and toys for distribution across the U.S.

INTERNATIONAL BIOTECH FIRM LONZA PLANS MAJOR EXPANSION IN THE REGION.

The Swiss pharmaceutical and biotech company Lonza announced plans to add an additional 150,000 square feet intended to produce commercial quantities of viral gene and cell therapies. This expansion adds to its facility currently under construction in Pearland. The final facility will total more than 250,000 square feet and be designed to accommodate the growth in demand for cutting-edge biotech therapies.

The Pearland facility is part of an emerging trend in the health care industry toward personalized medicine through technologies, such as cell and gene therapy. Lonza works in collaboration with biotechnology companies around the world, some of which are based in Houston, to develop these novel therapies and help make them a reality for patients.



Lonza broke ground on the initial phase of this project, a more than 100,000-square-foot clinical manufacturing and R&D facility in Pearland's Lower Kirby District, in March 2016. With an estimated opening date in late 2017, the company will initially employ more than 100 area residents with plans to employ up to several hundred scientists, engineers and biotech professionals over the next 10 years. The Pearland location includes offices, laboratories and cleanroom manufacturing space that will allow Lonza to more than double the production of its current viral gene and virally modified cell therapeutics, that it produces under contract for its customers.

Lonza is one of the world's leading and most trusted suppliers to the pharmaceutical, biotech and specialty ingredients markets. The expansion was part of a collaborative effort between Pearland Economic Development Corporation, the City of Pearland and the Greater Houston Partnership.

INTERNATIONAL INVESTMENT AND TRADE

In 2016, the Partnership hosted more than 125 inbound delegations from 46 countries.

The organization conducted 205 briefings and produced 810 trade matches and 20 international trade entities to create regional jobs, attract investment and expand trade.

The Partnership hosted programs featuring heads of state from Mozambique and New Zealand, as well as a royal visit from Belgium. In addition, the Partnership hosted multiple ambassadors from around the world, including Argentina, the Netherlands and South Africa.

MEXICO

- Mayor Sylvester Turner and the Partnership led a delegation of top Houston-area business representatives on a trade mission to Mexico City from Nov. 20-22. The delegation focused on the energy, health care and tourism sectors. The mission coincided with the first-ever Monday Night Football Game outside of the United States, featuring the Houston Texans vs. the Oakland Raiders on Nov. 21.

BELGIUM

- Her Royal Highness Princess Astrid of Belgium visited Houston as part of an economic mission to Texas. The delegation participated in discussions focused on energy, life sciences and logistics, as well as a MOU signing between Belgian and Houston-area companies at Partnership Tower.

CUBA

- The Partnership organized a historic trade mission to Havana, Cuba, from Sept. 25-27 led by Mayor Turner and Partnership Chair Jamey Rootes. The mission opened doors to future trade and business with Houston, and the region will continue to be part of the relationship with a post-embargo Cuba.



CHINA

- The Partnership met with U.S. Ambassador to China Max Baucus to discuss investing in Houston during the Select USA Roadshow.

MOZAMBIQUE

- The Partnership hosted a Mozambique Business Forum on Sept. 16 featuring a delegation led by Filipe Nyusi, President of the Republic of Mozambique.

NEW ZEALAND

- The Partnership welcomed the Right Honourable John Key, the Prime Minister of New Zealand, for a discussion on the growing relationship between New Zealand and Texas, the potential for increased business and investment, and the importance of trade with Asia.



GLOBAL CITIES INITIATIVE

In 2016, the Partnership continued its work with the Global Cities Initiative: A Joint Project of the Brookings Institution and JPMorgan Chase.





TOP 10 MARKET FOR MILLENNIALS

(NIELSEN 2015)

HARRIS COUNTY - THIRD IN TALENT ATTRACTION AND DEVELOPMENT

(EMSI ECONOMIC MODELING SCORECARD)

HOUSTONIANS ARE
POSITIVE ABOUT JOB
OPPORTUNITIES;
62 PERCENT RANKED
OPPORTUNITIES AS
EXCELLENT OR GOOD.

(35TH KINDER INSTITUTE HOUSTON-AREA SURVEY)

HOUSTON'S IMAGE

The Partnership led a **media mission** to NYC resulting in coverage from *Bloomberg*, *Forbes Sports Money*, *Forbes* and *TheStreet.com* that totaled more than 80 million impressions and generated a 1.1 million reach on social media.

The Partnership increased awareness of Houston No Limits image campaign through a **strong digital marketing program** that yielded more than 2.0 million views of the Partnership's "Why Houston" video.

The Partnership created the "Great Place to Play" campaign to **showcase Houston's lifestyle** with targeted messaging around Houston being a world-class sports city through the hosting of the NCAA Final Four, Copa America Centenario and Super Bowl LI in a 12-month period.

HOUSTON FIELD NOTES

The Partnership developed uniquely Houston messages or "**Houston Field Notes**" to promote the city and arm Houstonians with aligned messaging to share with visitors during the Super Bowl.

HOUSTON IS THE **MOST DIVERSE CITY IN AMERICA**.
HOUSTON IS **FUN AND AFFORDABLE**.
IF YOU WORK HARD AND DREAM BIG, **ANYTHING IS POSSIBLE**
IN HOUSTON.

TALENT ATTRACTION

The Partnership delivered 160 percent more job views on CareersWithNoLimits.com through a new "**Houston as an Employer**" campaign generating more than 1 million views since the site launched in September 2015.

The Partnership redesigned the **Houston Recruiter Toolkit** with top-level downloads and shareable information for marketing Houston at **LimitlessHouston.com**.



100 Days Out to Super Bowl LI #TeamHouston celebration at Partnership Tower.

Technology and innovation continues to transform the way we do business and are mission critical to Houston's economy. As a region, we have always been **on the leading edge of innovation within our respective industries**. However, there is a gap we must cross as it relates to technology, entrepreneurship and commercialization. This year, **we began to assess the region's innovation economy** and take steps to strengthen it.



THE PARTNERSHIP
IS ACTIVELY
WORKING WITH
**COMMUNITY-
MINDED BUSINESS
LEADERS** TO
CREATE AN
ENVIRONMENT
WHERE STARTUPS
THRIVE.

STARTUP GENOME

The Partnership collaborated with Startup Genome to perform an assessment of Houston's startup ecosystem, the nucleus of our innovation economy. The assessment will be benchmarked against 55 international cities to give us a robust picture on the health of Houston's startup ecosystem. The findings will also serve as a foundational data set as we further develop our Innovation Initiative in 2017.

STRATEGIC PLAN

Accenture will serve as our partner as the Partnership and Innovation Roundtable members develop a strategic plan. This year, Accenture began the formidable work of mapping out our innovation economy and will create a strategic plan to help Houston continue to develop as a global innovation hub. Execution against this plan will begin summer 2017.



STATION HOUSTON

The Partnership helped welcome a new and vital piece of infrastructure to Houston's innovation economy: Station Houston. The organization launched in March 2016 and recently expanded into 25,000 square feet at 1301 Fannin. The Partnership was a lead sponsor and is partnering with Station Houston to create a pathway between the business and startup communities.



UPSKILL HOUSTON

In 2014, the Greater Houston Partnership launched the UpSkill Houston Initiative to bridge the region's skills gap in the key sectors that drive Houston's regional economy. Today, UpSkill Houston continues to be recognized nationally as a program driven by industry leadership to develop a strong middle-skills talent pipeline for our region.

EMPLOYER LEADERSHIP CONTINUES TO ELEVATE

UpSkill Houston was selected to participate in the U.S. Department of Commerce's Communities that Work Partnership—a national program that aims to strengthen regional economies by equipping American workers with the skills needed for 21st century jobs and accelerating industry-led workforce development and training efforts. In April, U.S. Secretary of Commerce Penny Pritzker traveled to Houston to meet with local stakeholders and learn how the petrochemical manufacturing and industrial construction sectors, working alongside the Partnership, the regional workforce board, local community colleges and economic development organizations, have developed a comprehensive workforce partnership to create career paths for workers, fill employers' job openings and grow the local economy. Secretary Pritzker later discussed her visit at the Aspen Ideas Festival and praised UpSkill Houston as a great model for the Communities that Work Partnership.

WALKING THE WALK

Through the UpSkill Houston Initiative, the Partnership is demonstrating the business sector's commitment to



developing and maintaining a quality and skilled workforce. The recent build-out of the office space in the new Partnership Tower was completed by Partnership member companies that demonstrate that same commitment. The Partnership teamed up with the Construction Career Collaborative, or C3, which has developed a set of principles for commercial construction companies to follow in their business practices that include financial security; health and wellbeing of craft professionals; and appropriate safety and craft training for their workforce. This decision further promotes the UpSkill Houston message and demonstrates the business community's commitment to championing a sustainable skilled craft professional workforce.

IMPACT REPORT: ATTRACT, TRAIN AND PLACE

The petrochemical manufacturing sector has developed a strong business-led collaborative with the East Harris County Manufacturers Association (EHCMA) and its employer members. Leaders from ExxonMobil, Shell, LyondellBasell, Chevron Phillips, Dow and others are collaborating to develop the long-term talent pipeline for the petrochemical plants in the region. The sector has also engaged community-based organizations, like Neighborhood Centers, Inc., as well as the region's nine community colleges through an innovative model of collaboration known as the Community College Petrochemical Initiative (CCPI). Since fall 2012, enrollments in targeted technical programs have increased an average of 18 percent per year (32 percent increase in the past year). Certificate and degree completions have increased 42 percent this past year in the same technical programs. The industry sector also introduced PetroChemWorks.com, a new career exploration website to inform students and job seekers about the thriving petrochemical industry and relevant education.

Similarly, in the construction sector, strong leadership from Bellows Construction, Balfour Beatty, S&B Engineers and Constructors, Jacobs, Marek Brothers Systems and others has guided collaborative efforts to develop the pipeline of qualified entry-level and incumbent workers. In collaboration with United Way of Greater Houston and Gulf Coast Workforce Solutions, the sector developed scalable prototypes to attract, train, and place qualified, skilled entry-level workers. These prototypes screened more than 300 individuals, interviewed approximately 100 potential candidates, and trained and placed 40 individuals. The sector, along with McKinsey & Company's Generation Initiative, is developing a training and development platform based on these prototypes, and the first cohort successfully graduated 18 individuals. UpSkill Houston is activating its health care sector by mapping and exploring the specific skills gap priorities in health care. Business leaders and the necessary structures for the sector are being identified to guide this work and to develop the collective partnership of organizations that are necessary to build a strong, qualified and skilled workforce for this vital industry in Houston.

“What I learned is that Houston's leadership is really driven by the fact that employers are leading, and they've come together,” Pritzker said. “They're not competing with one another, but instead, they've come together to recognize that they have a problem.”

**U.S. SECRETARY
OF COMMERCE
PENNY PRITZKER**



“Programs like C3 exemplify the approaches championed by UpSkill Houston,” Luna said. “By committing to build out the space in Partnership Tower as a C3 project, the Partnership sets a leadership example for all owners, developers, construction companies and building managers who are planning and building projects throughout the Houston region.”

**GINA LUNA,
CHAIR OF UPSKILL HOUSTON**





The Partnership represents the interests of the regional business community by advocating for effective laws and regulations at every level of government. **Our ultimate goal is to strengthen the regional business climate** by collaborating with our elected officials and their staffs to establish policies that preserve and promote the long-term growth and prosperity of the Houston region.

PUBLIC POLICY 2020: DEVELOPING AN IMPACT AGENDA

In Q1 of 2016, the Partnership convened business and civic leaders in the six policy areas of education, energy, the environment, health care, quality of place and transportation for a strategic planning effort called Public Policy 2020. **The main goal was to debate and identify the region's most pressing issues that must be addressed over the course of the next several years.** The effort was driven in large part by the policy advisory committees, under the direction of the committee chairs, and included input from more than 400 members and industry experts.

With support and direction from the Public Policy Steering Committee, the Partnership's policy team researched and analyzed 100 issues, which translated into five top priorities at the state level.

The Partnership also continued to promote policies that will ensure a strong workforce pipeline, including implementation of HB4, the state's high-quality pre-K bill enacted in 2015, and through its ongoing support of the Early Matters coalition.



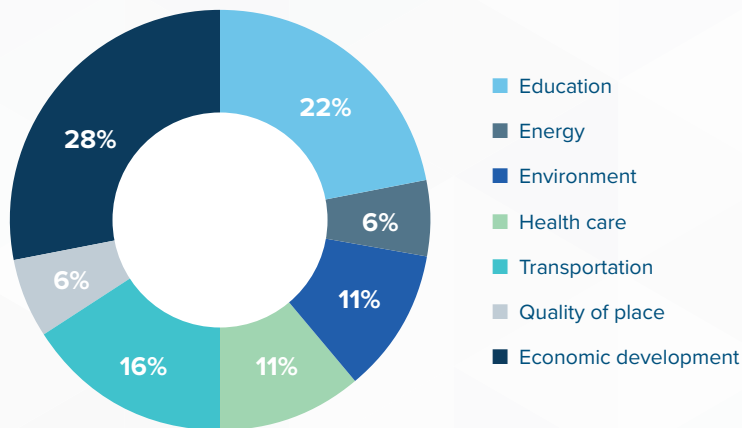
STRONG PUBLIC POLICY REQUIRES GREAT DATA AND ANALYTICS. SUCCESSFUL ADVOCACY RESULTS FROM STAYING FOCUSED ON THE ISSUES THAT WILL HAVE THE GREATEST IMPACT ON HOUSTON.

As always, the Partnership continues to work directly with a wide variety of stakeholder groups, including a growing network of chambers of commerce across the region, to advance our policy positions.

In 2016, the Partnership was honored to work closely with our regional elected officials at all levels of government. In 2017, we hope to continue to be a resource for all.

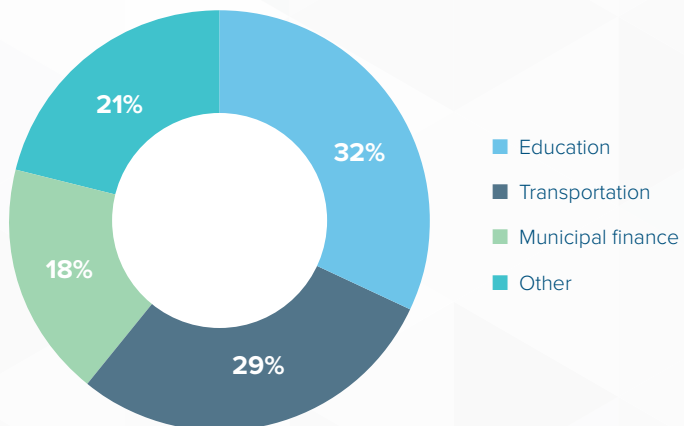
2016 MARKED THE FIRST FULL YEAR HOUSTON COMPANIES LIKE APACHE, ENTERPRISE PRODUCT PARTNERS AND KINDER MORGAN COULD BENEFIT FROM BEING ABLE TO EXPORT CRUDE OIL. **THE PARTNERSHIP WORKED CLOSELY WITH OUR BOARD MEMBERS AND KEY LAWMAKERS AT THE END OF 2015 TO END THE 40-YEAR BAN.**

STATE-LEVEL FOCUS BY ISSUE AREA (2013-2015)



This chart conveys the state-level areas of focus by issue, prior to the Public Policy 2020 initiative.

HOUSTON'S BIGGEST CHALLENGE



As part of Public Policy 2020, policy committee members were asked to identify Houston's biggest challenges over the next five years.

The issues were identified and narrowed by asking "What is the impact on Houston?" and "Is the Partnership best positioned to lead the charge?"

		BIG IDEAS	MID-TERM FOCUS	HIT LIST
	Education	11	9	4
	Energy	13	8	3
	Environmental	11	7	4
	Health care	22	10	3
	Quality of place	18	5	3
	Transportation	25	7	5

SURVEY FEEDBACK ABOUT THE PUBLIC POLICY 2020 EFFORT INCLUDED:

"It was great to see the next two generations of Houston leaders there and actively engaged. You know the meeting was successful when there were three groups in the building lobby still talking 15 minutes after the meeting adjourned."

"I thought it was a needed discussion with relevant stakeholders for identifying critical issues that will need Partnership focus in the coming years."

"I thought that the right people were in the room to spur productive conversation and an exchange of ideas."

"It was an opportunity to look further down the road, beyond the immediate."

CITY OF HOUSTON'S FINANCES – SOLUTIONS FOR LONG-TERM STABILITY

Houston's fiscal health impacts our economy and influences long-term economic trends. Formed in 2014, the Municipal Finance Task Force continued its work to educate the business community and city stakeholders to encourage the development of a long-term solution that facilitates financial stability and economic growth. **This year, the Partnership worked with City of Houston Mayor Sylvester Turner to tackle the City of Houston's largest and most compelling expense driver: pension costs.**

After two years of analysis, Task Force Chair Marc Watts, President of The Friedkin Group, published two op-eds in the Houston Chronicle laying out six principles for pension reform based on more than two years of studying the issue. **The first, published in April and titled "Six Principles to Help Fix Broken Pension System," outlined these principles, meant to guide any comprehensive pension reform effort.** In October, Mayor Turner announced the completion of a deal to reform the city's pension systems and place the city on a path toward financial health. Watts' second op-ed, published in late October and titled **"A Pension Solution for Houston is in Sight," outlined how the mayor's proposed plan was in line with our six key principles.**

HIGH-QUALITY PRE-K

The Partnership has been a leader in working toward solutions for early childhood success, including access to high-quality pre-kindergarten (pre-K). To that end, the Partnership formed Early Matters, a coalition of business, civic, education, philanthropic and nonprofit organizations and volunteers working together to raise awareness of the importance of high-quality early education and to make a strong case for increased investment in a critical, high return on investment area.

THE LEGISLATURE APPROPRIATED \$118 MILLION FOR THE BIENNIUM TO ALLOW SCHOOL DISTRICTS TO BOLSTER THEIR PRE-K PROGRAMS.

Last legislative session, the Partnership worked closely with Houston's legislators to pass HB4 to create opt-in, high-quality pre-K grant programs and establish a community goal of third-grade readiness. To maintain the high-quality pre-k program at the current level, the legislature will need to allocate at least \$236 million in the upcoming biennium. In addition, the long-standing \$1.7 billion pre-K half-day program must be maintained.

Under leadership from the Partnership's Education Advisory Committee Chair Scott McClelland, President of H-E-B (Houston Region), **the Partnership supports a \$236 million appropriation for high-quality pre-K programs in the 2017 Texas Legislative Session.** The additional appropriations will help improve the state's quality of education, ultimately impacting graduation rates and future workforce development.



HOUSTON'S IMPROVING AIR QUALITY

An ongoing initiative of the Partnership's Air Quality Subcommittee, the *On Air: Houston* website, HoustonAirQuality.com, serves as the go-to source for fact-based information about the state of Houston's air quality. Members who visit the website will find data that shows how regional air quality continues to improve and general information to understand the challenges in meeting federal air quality standards.

WHILE THE HOUSTON POPULATION INCREASED 41 PERCENT BETWEEN 2000 AND 2015, **REGIONAL OZONE POLLUTION LEVELS DECREASED 29 PERCENT.**

Due to the combined efforts of businesses and industry, local, state and federal government and individual citizens, the Houston region has sustained economic growth while achieving substantial air quality improvements.

This year, in addition to finding general air quality information on the website, the regional business community can download the Houston air quality toolkit. The toolkit includes frequently asked questions, air quality talking points, a graphic depiction of ozone pollution standards for Houston's air, and a sample email or newsletter article for use by members in their communications.

In the fall, members of the Air Quality Subcommittee, under leadership of Rebecca Rentz, Senior Counsel at Occidental Petroleum Corporation, visited 16 state legislative offices of members serving on the Texas Legislature's Environmental Oversight Committees. The trip served to educate policymakers about continued improvements to Houston's air quality and to demonstrate the unique resource that the website provides to lawmakers. Numerous members expressed strong appreciation for the opportunity to learn about the gains Houston has made in air quality and indicated their continued support of the region.

MEMBER ENGAGEMENT

In order to achieve our mission of making Houston one of the world's best places to live, work and build a business, the Partnership relies on a base of actively engaged members. The Partnership also offers member company employees opportunities for networking and professional development through Partnership Programs, Councils and events.



SIGNATURE EVENTS

In 2016, the Partnership hosted some of the region's leading business professionals and elected officials who are working to make Houston greater. Approximately 20,416 business leaders attended more than 374 Partnership meetings and events.



AMBASSADORS

Working primarily with small and medium-size businesses, Partnership ambassadors are a group of committed volunteers who welcome and help members engage in Partnership Committees, Councils and Programs. They assume a leadership role because they believe in the Partnership and have

experienced the incredible value of membership firsthand. In 2016, the Partnership's 52 ambassadors assisted more than 678 member companies in navigating their Partnership membership.

2016 GREATER HOUSTON PARTNERSHIP PROGRAMS

Partnership Programs welcomed 2,556 participants to lunch and learn events, progressive networking events, professional development programs, thought leader breakfasts and more.



Business Development



Executive Women's Partnership (EWP)



Women's Business Alliance (WBA)



Houston Young Professionals Endeavor (HYPE)

MEMBER COMPANY PARTICIPATION



COMMITTEES

2,465



PROGRAMS

2,556



EVENTS

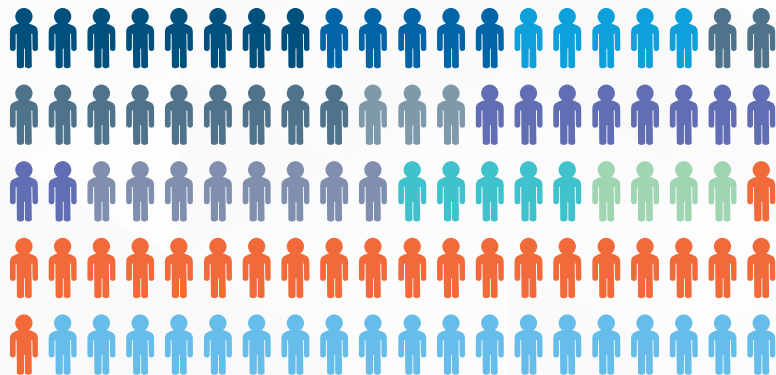
13,430



COUNCILS

1,965

MEMBER COMPANIES BY INDUSTRY



8% REAL ESTATE

5% WHOLESALE & RETAIL

5% TRANSPORTATION & UTILITIES

11% CONSTRUCTION & ENGINEERING

3% ENERGY

10% FINANCE & INSURANCE

8% HEALTH & EDUCATION

5% INFORMATION

4% MANUFACTURING

22% MISCELLANEOUS

19% PROFESSIONAL SERVICES

THE PARTNERSHIP REPRESENTS



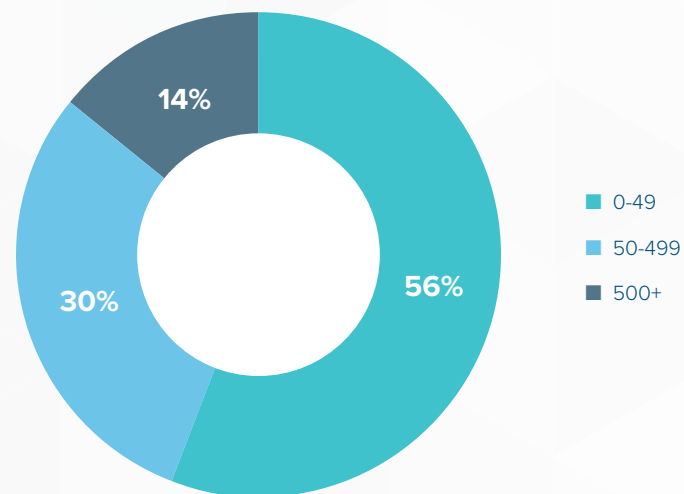
1,073
MEMBER COMPANIES*



216
2016 NEW MEMBERS

**Excludes reciprocal and life members*

MEMBER COMPANIES BY NUMBER OF EMPLOYEES



0-49
50-499
500+

MEMBER ENGAGEMENT



20,416

ATTENDEES AT

374

MEETINGS AND EVENTS



81

PROGRAMS AND

2,556

REGISTRANTS



52

AMBASSADORS
WORKED WITH

678

MEMBER COMPANIES

Texas Lieutenant Governor
Dan Patrick joined the
Partnership for a conversation
on the Texas budget and taxes.



The Partnership hosted the Business of Sports event to
highlight the economic impact of sporting events, like
Super Bowl LI, on the Houston region.

Harris County
Judge Ed Emmett
addressed the
audience at the
annual State of the
County event.





Houston Young Professionals Endeavor gathered for HYPE for the Holidays at the Houston Zoo for networking and a fun evening.



Mayor Sylvester Turner attended this year's Soirée, in which the theme "Inspiring Innovation" helped make it a record-setting event.



Gina Luna received the Bob Onstead Leadership Award for her accomplishments as 2015 Partnership Chair.



The annual Rise to the Top event featured outstanding female executives in the Houston region from a variety of industries.



The Partnership and its Global Cities Initiative partners released a new Metro Export Plan at the State of Houston's Global Economy event.





GREATER HOUSTON PARTNERSHIP UNVEILS SHINY, NEW DIGS IN DOWNTOWN

"The idea behind the newly completed space was to create a more impressive 'front door' for Houston, a place where dignitaries, heads of state, corporate CEOs, important people coming through this community could get the vision of the next great global city."



HOUSTON EXPORT PLAN AIMS TO CUT REGION'S ENERGY PRICE EXPOSURE

"Greater Houston Partnership announces first-ever Houston metro export plan to support diversification of exports, mitigating commodity prices that may 'challenge the industry through the end of the decade.'"



ONCE WEDDED TO OIL, HOUSTON ECONOMY CARRIES ON DESPITE BUST

"Houston has expanded well beyond oil. In the 1980s, the city's economy was 84 percent dependent on oil and energy for its gross domestic product. That figure has dropped to about 44 percent."



HOW THE COMMERCE DEPARTMENT IS FIGHTING TO CLOSE THE SKILLS GAP

"Seven cities took part in a variety of projects, including multi-day learning exchanges, economic, workforce and talent coaching from national experts, and case study documentation. Secretary of Commerce Penny Pritzker was especially struck by the experience she had in Houston."



SIX PRINCIPLES TO HELP FIX BROKEN PENSION SYSTEM

Opinion piece by Marc Watts, Chair of the Partnership's Municipal Finance Task Force

"City revenues have been growing at a healthy clip for the last decade, despite the voter-imposed cap on ad valorem taxes. Our community must focus on reforming the city's broken pension system."



BIOTECH'S ROLE IN HOUSTON'S FUTURE

"Houstonians have been lauding the city's economic diversity for months as the Bayou City has continued to feel the effects of low oil prices. Specifically, business leaders and economists have pointed to the health care and biotech industries as the lifeboat for the city's downturn."



IN HOUSTON...EMPLOYMENT STILL GROWS

"In the Houston metropolitan area, which compared to the rest of Texas has traditionally been most dependent on the energy sector, the oil crash did not prevent a net gain of 23,000 jobs last year."



HOUSTON ECONOMY DRAWING PLENTY OF NEWCOMERS DESPITE ENERGY DOWNTURN

"And while a critical industry suffers others have picked up the slack due, in part, to a recovering national economy. Health care continues to add jobs, many exporters are thriving and low energy prices have fueled an unparalleled degree of expansion and prosperity in petrochemicals and refining."



THE GREATER HOUSTON PARTNERSHIP DEVELOPS PLAN FOR MORE COMPANIES TO EXPORT PRODUCTS

"The Greater Houston Partnership came up with the plan as part of the Global Cities Initiative, a project developed by the Brookings Institution and JPMorgan Chase to help American metropolitan areas engage more in world markets."



Guillermo Garcia-Alcocer, Chairman of Mexico's Energy Regulatory Commission, discussed Mexico's energy regulatory framework with the Partnership.



Bob Harvey welcomed Congressman Michael McCaul to the Partnership's Cybersecurity breakfast.

The Partnership honored its elected officials at the annual Texas State Regional Delegation Dinner.



Mayor Sylvester Turner delivered his first State of the City address before the Partnership.



Ryan Lance, Chairman and CEO of ConocoPhillips, and Jason Bordoff, moderator, discussed the future of the energy industry at the Partnership's State of Energy.



Marek Gootman, Director of Strategic Partnerships and Global Engagements for the Brookings Institution, delivered the keynote address at the Partnership's State of Houston's Global Economy.



Representatives from the Partnership and Mitsubishi Heavy Industries and Texas Governor Greg Abbott celebrated the relocation of the MHI America headquarters from New York City to Houston.





COMBINED STATEMENTS OF FINANCIAL POSITION AS OF DEC. 31, 2016 AND 2015

ASSETS	2016 Estimated	2015 Audited
Cash and cash equivalents	\$5,928,839	\$8,647,660
Accounts receivable, net	331,367	219,084
Investments	4,950,804	4,670,595
Pledges receivable, net	6,124,100	6,590,531
Prepaid expenses and other assets	314,754	306,788
Property, net	5,089,183	345,971
Total assets	\$22,739,047	\$20,780,629

LIABILITIES AND NET ASSETS

LIABILITIES	2016 Estimated	2015 Audited
Accounts payable and accrued expenses	1,273,387	523,410
Deferred membership revenue	3,125,267	2,418,007
Other deferred revenue	413,410	257,884
Total liabilities	\$4,812,064	\$3,199,301

NET ASSETS	2016 Estimated	2015 Audited
Unrestricted	7,850,294	3,131,543
Temporarily restricted	10,076,689	14,449,785
Total net assets	17,926,983	17,581,328
Total liabilities and net assets	\$22,739,047	\$20,780,629

For a complete copy of the audited financial statements for the year ending Dec. 31, 2015, please contact the Finance Office at 713-844-3667.

COMBINED STATEMENTS OF FINANCIAL ACTIVITIES AND CHANGES IN NET ASSETS

YEARS ENDED DEC. 31, 2016 AND 2015

REVENUE	2016 Estimated	2015 Audited
Membership dues	\$7,850,000	\$7,590,481
Event registration and sponsorship fees	2,666,638	2,563,194
Publications, merchandise sales, and other revenue	179,549	211,557
Investment return, net	147,485	31,614
Net assets released from restriction	10,066,551	5,840,363
Total revenue	\$20,910,223	\$16,237,209
EXPENSES	2016 Estimated	2015 Audited
Restricted program services	5,066,551	5,840,363
Restricted Partnership Tower Capitalization	5,000,000	--
Unrestricted expenses		
Personnel costs	6,938,629	6,988,291
Other expenses	4,069,124	4,189,657
Total expenses	\$21,074,304	\$17,018,311
Change in unrestricted net assets		
Operations	(164,081)	(781,102)
Building capitalization changes	4,882,832	--
Net change in restricted assets	(4,373,096)	(4,471,664)
Net assets, beginning of year	17,581,328	22,834,094
Net assets, end of year	\$17,926,983	\$17,581,328

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, 2016, will be available upon the completion of the audit in the second quarter of 2017. Estimates shown above are subject to revision.

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