

MAY 2026

NOVA Roadmap Progress Report





A Message from NVC's President & CEO

Dear NOVA Roadmap Investor,

Thank you for your continued investment in the Northern Virginia Chamber (NVC), your leadership in advancing the **NOVA Roadmap initiative**, and your confidence in NVC to help lead this transformational regional effort.

Since the launch of the NOVA Roadmap in July 2025, NVC has moved decisively from vision to execution across all four goals. With more than 50 investor organizations, seven Executive Councils, and a growing network of public and private sector partners, NVC has rallied the region's business leaders, educational institutions, and policy leaders around a shared mission: strengthening and transforming Northern Virginia's economic competitiveness and resilience.

We have raised our collective voice to set a vision of our region's future and advocate for the decisions, projects, legislation and action that will propel us to success.

Amid rising pressure on affordability, infrastructure capacity, the ability to attract and retain top talent, and economic diversification, the Roadmap serves as

the region's trusted framework for regional alignment and economic policy action. As the voice of business, NVC is in the driver's seat, guiding how economic policy is prioritized, sequenced, and advanced.

Enclosed is the NOVA Roadmap Progress Report which highlights NVC's ongoing progress across policy, coalition-building, and regional engagement. This report reflects both the strong foundation that has been established over the past year and the continued momentum behind this multi-year initiative.

We are grateful for your ongoing leadership, vision, and partnership, and we look forward to continuing to build on this progress together.

Sincerely,

A handwritten signature in black ink that reads "Julie Coons". The signature is written in a cursive, flowing style.

Julie Coons
President & CEO
NVC



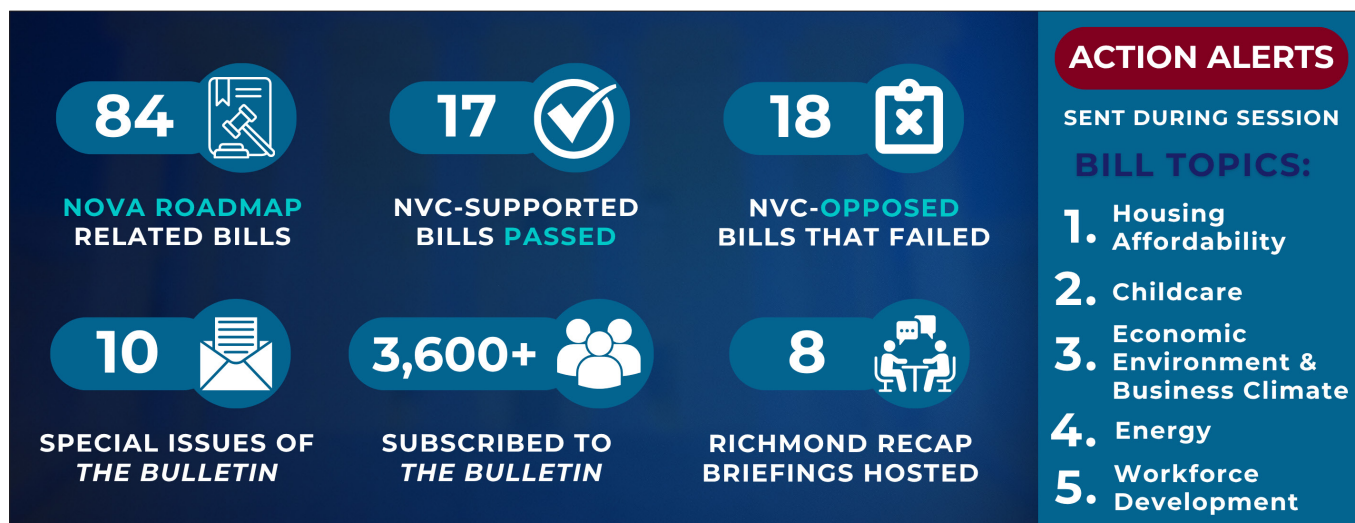
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ROADMAP GOAL #1: Reinvent the economy.

LOBBYING AND POLICYMAKER ENGAGEMENT

- Established seven employer-led Executive Councils to guide and lead regional economic strategy across high-priority sectors
- Shaped NVC's **2026 Legislative Agenda** to advance pro-business priorities, including the preservation of Virginia's Right-to-Work status, competitive tax policy, and economic development incentives
- NVC's Government Relations team expanded to 2 professionals to support sustained Roadmap advocacy and execution at the state and local level
- Engaged state leadership, including the Spanberger Administration and the Virginia Economic Development Partnership (VEDP), on economic resiliency and workforce disruption through executive-level meetings and dialogue
- Convened two legislative receptions for gubernatorial candidates to advocate for the policy priorities of NOVA's business community
- Briefed Lieutenant Governor Ghazala Hashmi, Secretary of Finance Mark Sickles, Secretary of Transportation Nick Donohue, Secretary of Labor Jessica Looman, and Secretary of Natural and Historic Resources David Bulova, and state senators and delegates during Lobby Day and Viva Virginia
- Formalized a request to Governor Spanberger to join a Northern Virginia business leader roundtable focused on the Roadmap recommendations critical to restoring Virginia to the top of the national business rankings by aligning state policy with Northern Virginia's economic realities
- Created an open dialogue with Commerce Secretary Carrie Chenery on the needs of Northern Virginia employers for an active partnership with NVC and its members to advance the Commonwealth's most important economic region



INNOVATION AND INDUSTRY ADVANCEMENT

- Served as a founding member of Fairfax County's AI Coalition Steering Committee supporting the development of a regional AI strategy
- Promoted spaceNEXT, positioning Northern Virginia in the emerging global space economy
- Convened the NVC Federal Innovation Executive Council to discuss responsible AI regulation, receive insights from industry leaders regarding federal and state AI regulation, and determine next steps for advocacy on these issues.



REGIONAL ALIGNMENT AND CONVENINGS

- Partnered with regional chambers, economic development organizations, and public-sector stakeholders to advance regional alignment around shared economic priorities and Roadmap implementation
- Organized and led a business coalition to advance pro-employer voices during General Assembly
- Served as a premier partner at the 10th Annual Northern Virginia Regional Elected Leaders Summit, convening business and public-sector leaders to align on shared economic priorities
- Served as a key partner in the 2026 Shape of the Region Conference, supporting cross-sector dialogue on long-term regional growth, competitiveness, and resilience
- Demonstrated growing external alignment of Roadmap priorities with regional economic strategies, including GO Virginia Region 7's 2025 Growth and Diversification Plan, reinforcing adoption of shared regional competitiveness priorities

ROADMAP GOAL #2:

Cultivate affordability for our workforce.

HOUSING AFFORDABILITY

Since the launch of Roadmap, NVC has used our standing as the voice of business to elevate housing affordability as a leading workforce priority for employers. To this end, NVC has organized convenings on employer-led housing initiatives to advance the supply of all housing types and advocated to advance housing regulations and policies in Richmond and Northern Virginia.

- Convened the **NOVA Roadmap Innovators and Stakeholders Exchange (NOVA RISE)** program to elevate housing affordability, energy infrastructure, and economic competitiveness as regional policy priorities
- Launched the **NOVA Housing Supply Framework** with the Northern Virginia Association of Realtors® (NVAR) and Northern Virginia Building Industry Association (NVBIA) to establish a cross-sector regional task force aligning housing, transportation, and economic policy
- Briefed Governor Spanberger on the Roadmap, and her campaign platform heavily featured a core goal of NVC's: cultivating affordability
- Collaborated with Fairfax County leadership on multiple housing affordability proposals:
 - Partnered with County staff on Board of Supervisors Chairman Jeff McKay's, **Housing Initiatives to Increase Production and Sustain our Economic Advantage**, a plan that explicitly directs County staff to work with NVC to "explore ways in which the private sector can assist in enhancing the production of affordable and market-rate housing in Fairfax County."
 - NVC's Government Relations team in continued dialogue with Fairfax County government staff on the county's **Housing Task Force Draft Action Plan**, which advances regional housing production goals





TALENT RETENTION AND WORKFORCE DEVELOPMENT

- Convened the NVC Talent and Workforce Executive Council for a discussion with Virginia Works Commissioner Nicole Overley regarding the Governor's [Federal Impacts Assessment Executive Order](#)
- Advanced discussions on federal contractor workforce trends and reskilling opportunities through NVC's NOVAnext partnership
- Convened a series of discussions with NVC's Healthcare Executive Council regarding innovative healthcare workforce solutions that NVC can advocate in Richmond and regionally
- Supported workforce development and apprenticeship initiatives through NVC's Legislative Agenda and Executive Council work

TRANSPORTATION AND MOBILITY

- Championed the 495 Express Lanes Northern Extension (495 NEXT) and the Southside Express Lanes as cornerstone regional investments to enhance mobility and alleviate commuter cost pressures
- Provided a critical business voice during the DMVMoves Task Force process, pushing for the inclusion of priorities on governance and accountability
- Elevated transportation infrastructure as a key driver of housing affordability and regional economic competitiveness during our State of Transportation event

ROADMAP GOAL #3:

Modernize and streamline the regulatory environment.

BUSINESS CLIMATE AND REGULATORY REFORM

- Testified before the Fairfax County Board of Supervisors on the [FY26 Fairfax County Advertised Budget Plan](#), advocating for keeping the real estate tax rate flat, increasing funding for economic development, and proactively engaging with the business community
- Collaborated with the Office of Fairfax Board of Supervisors Chairman Jeff McKay and senior leadership at Fairfax County on the [Chairman's Board Matter](#) to renew the County's focus on economic competitiveness, including streamlining regulations, expanding incentives, strengthening workforce pipelines, and amplifying Fairfax's global reputation
- Joined national, regional, and state coalitions addressing legislation impacting the competitiveness of NOVA's business community, including:
 - ▶ A national coalition of state, regional, local, and metro chambers of commerce in support of the Prove It Act (H.R. 1163)
 - ▶ A statewide coalition successfully urging the Governor to veto class action lawsuit enabling legislation
 - ▶ A coalition of Northern Virginia chambers of commerce opposing Virginia's proposed paid family and medical leave legislation
- Lobbied in Richmond and locally to streamline regulatory processes to reduce residential and commercial development project delays and improve economic development outcomes
- Joined the Permitting Reform Coalition – spearheaded by the U.S. Chamber – and signed on to a series of letters to members of Congress [urging bipartisan action to pass comprehensive permitting reform](#)

ENERGY INFRASTRUCTURE

- Joined a coalition of state and regional organizations supporting energy grid projects, led by Roadmap Investor Dominion Energy
- Engaged public and private sector stakeholders on regulatory modernization and infrastructure delivery constraints and has scheduled the Energy and Mobility Executive Council to convene with industry leaders in Small Modular Reactor (SMR) technology as well as microgrids to advance the Roadmap recommendations related to the advancement of these efforts in our region

ROADMAP GOAL #4: Tell our powerful story.

REGIONAL NARRATIVE

NVC advanced the NOVA Roadmap as the leading regional framework for economic competitiveness and resilience through coordinated media engagement, cross-sector communications, and new event programming, further strengthening Northern Virginia's economic narrative.

- Reached national, regional and statewide audiences informing them of the NOVA Roadmap via media including *Politico*, *The Washington Business Journal*, the *Richmond Times-Dispatch*, *Axios DC*, NBC4, WTOP
- Launched a quarterly Business Leader Survey that elevates regional business sentiment and concerns reaching deep into national, regional, and statewide media outlets
- Elevated the voices of Roadmap Investors through interviews and the publication of an op-ed in the *Richmond-Times Dispatch*
- Amplified Northern Virginia's identity as an innovative and globally competitive regional economy through new Roadmap-centered convenings and initiatives, including:
 - Created three new Signature Events: NOVA RISE, State of Entrepreneurship, and Policy Summit
 - Rolled out two new series: Roadmap Policy Labs and Off the Record dinners
 - Launched a revamped Annual State of the Region program, featuring Richmond Fed President Tom Barkin and regional business leaders
 - Hosted national and regional experts in affordability, workforce, energy, AI, and other critical topics at monthly C-Suite Roundtables and bi-weekly Executive Member Forums
 - Released the NOVA Roadmap Key Takeaways and Insights report on housing affordability, energy infrastructure, and leadership
 - Convened weekly Richmond Recap calls during the legislative session to provide employers with critical and timely information on legislation impacting their businesses

STAKEHOLDER ENGAGEMENT

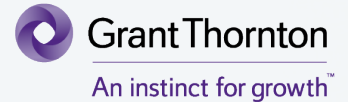
- Briefed local, regional, and state chambers of commerce, economic development organizations, industry groups, and regional leaders creating a shared objective for Roadmap priorities
- Engaged regional elected officials and General Assembly members to advance Roadmap recommendations and enlist support to accelerate implementation

NOVA ROADMAP INVESTORS

CHAIRMAN'S CIRCLE



VISIONARY



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Northern Virginia Chamber

The Voice of Business in Northern Virginia®

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