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STRATEGIC PLAN

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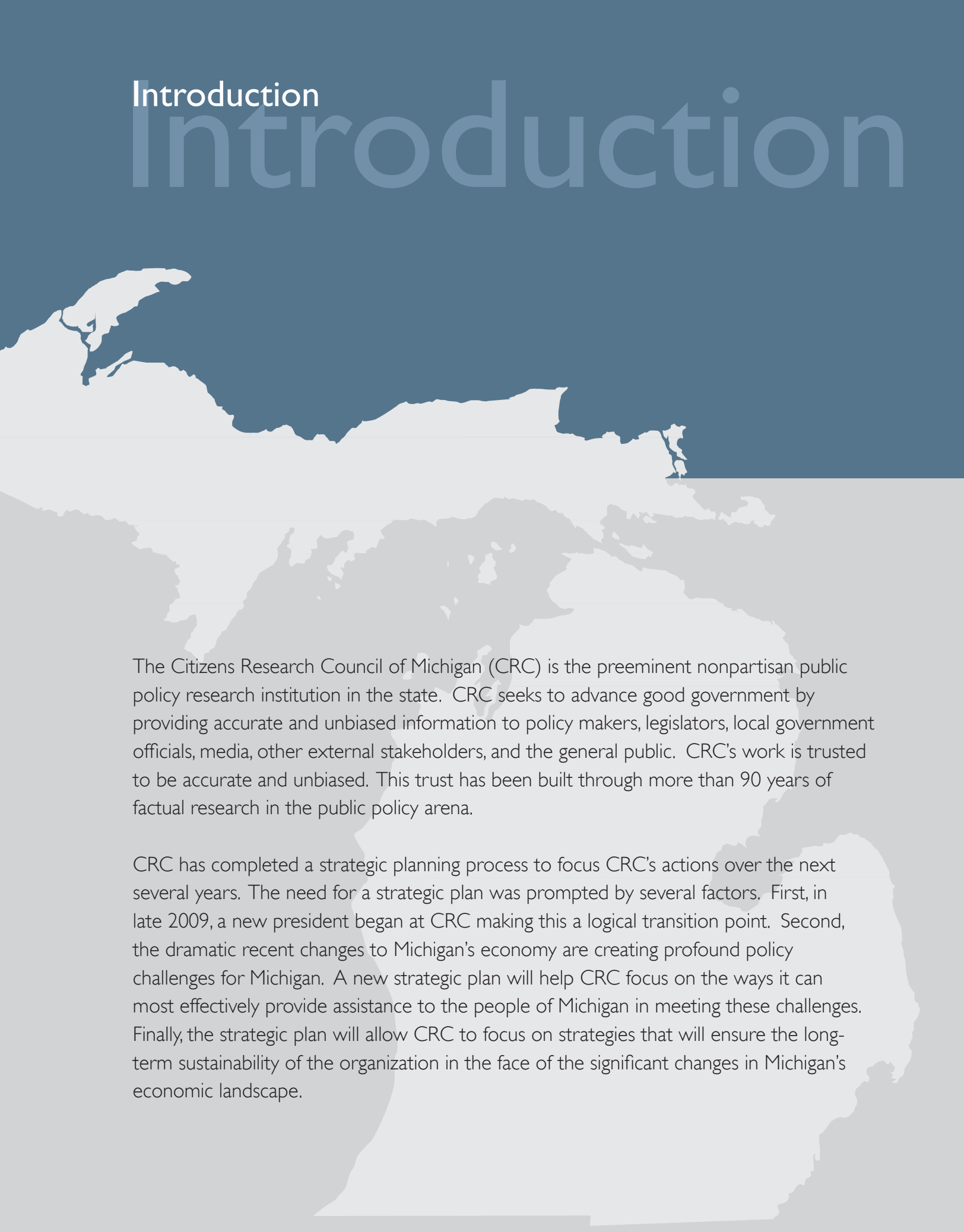
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Introduction

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The Citizens Research Council of Michigan (CRC) is the preeminent nonpartisan public policy research institution in the state. CRC seeks to advance good government by providing accurate and unbiased information to policy makers, legislators, local government officials, media, other external stakeholders, and the general public. CRC's work is trusted to be accurate and unbiased. This trust has been built through more than 90 years of factual research in the public policy arena.

CRC has completed a strategic planning process to focus CRC's actions over the next several years. The need for a strategic plan was prompted by several factors. First, in late 2009, a new president began at CRC making this a logical transition point. Second, the dramatic recent changes to Michigan's economy are creating profound policy challenges for Michigan. A new strategic plan will help CRC focus on the ways it can most effectively provide assistance to the people of Michigan in meeting these challenges. Finally, the strategic plan will allow CRC to focus on strategies that will ensure the long-term sustainability of the organization in the face of the significant changes in Michigan's economic landscape.



CRC's Mission

The mission of the CRC is to promote the development of informed public policy at all levels of Michigan government through the delivery of factual and unbiased analysis of the most critical issues pertinent to state and local government.

CRC works to promote the development of superior public policy through work in five areas:

1. Monitoring trends in state and local finances
2. Analyzing the structure and organization of government
3. Conducting in-depth studies of major public policy issues
4. Identifying options to address policy concerns
5. Informing and educating public officials and concerned citizens to promote efficiency, effectiveness, and accountability in governmental operations

CRC adheres to a number of guiding principles in performing its work:

Nonpartisanship – CRC does not advocate for a particular political party, interest group, or philosophical perspective. CRC instead seeks to educate citizens, government representatives, and various organizations so that they can better choose the policies that best fit their values. CRC does make policy recommendations. However, these recommendations are only made if they are supported by CRC's research, represent a recommendation for good government, and can be made in a nonpartisan manner.

Objectivity – CRC does not select facts to reach a predetermined conclusion. Rather, CRC carefully analyzes all of the available facts to see if they point to a conclusion. CRC will not arrive at a conclusion if the facts do not support it.

Quality Research – The decisions of policy makers can have a profound impact on the daily lives of the state's citizens through the allocation of limited resources for public education, criminal justice, social welfare, and infrastructure programs. Further, the level of taxation, and the disposition of billions of dollars of state and local government funds affect citizens' well being. State citizens have an important effect on public policy through their choice of elected representatives and their decisions on ballot questions. The people of Michigan can only rely on CRC's research in making these decisions if they have confidence that the research question was thoroughly investigated, the facts fully gathered, and the conclusions carefully thought out. CRC always works to make sure its research is of the highest quality.

Independence – CRC works to maintain both the independence of its research and the appearance of independence. Closely related to nonpartisanship and objectivity, independence means that CRC does not conduct research to further a particular interest group's position. Because of the impeccable reputation that CRC has developed over 90 years, its endorsement of a policy position carries significant weight in the public debate. Interest groups will often look to advance their position by arguing that CRC supports it.

Relevance – CRC strives to ensure that all of its research is directly applicable to the most pressing questions facing Michigan citizens and policymakers. While CRC may partner with academic institutions, CRC's focus is not on conducting research purely for the sake of advancing field-specific knowledge. Rather, CRC's research is directly focused on improving public policy in Michigan.

Timely – For public policy research to be useful, it must be available in time for it to be used in decision making. An analysis of a ballot initiative that is published after the election is of little value. Therefore, CRC works to ensure that its research is completed in time to be of assistance to policymakers when decisions need to be made on important policy matters.

Goals, Objectives, Strategies, and Activities

A number of important themes emerged in the creation of the strategic plan. First, over the past 90 years, CRC has developed a reputation for doing outstanding research that is unbiased and objective. Building upon that legacy was identified as a central goal for CRC. CRC will accomplish this by instituting processes that both help to protect the independence of the organization and to ensure the quality of the research, and by building the overall capacity of the organization in terms of human capital and infrastructure.

Second, CRC needs to work to extend the reach of its research. This will be accomplished by increasing the visibility of the organization and developing new channels and methods for disseminating the research findings.

Third, as a result of the decline in Michigan's economy, CRC is operating in a difficult funding environment. CRC needs to diversify and expand its funding base, and at the same time carefully steward its resources.

Finally, CRC needs to foster a culture of continuous learning and improvement, carefully assessing what works and what does not and continually making changes to improve the effectiveness of the organization.

These themes are addressed through five goals that were developed to guide the organization's efforts over the next five years in achieving its mission.

1. **CRC is widely recognized as the premier provider of timely, relevant, and unbiased research promoting informed public policy decision making.**
2. **Michigan citizenry is more informed about public policy issues, alternatives, and implications, and is more engaged in public policy discussions.**
3. **CRC is a financially stable organization.**
4. **CRC has the organizational capacity to advance its mission.**
5. **CRC ensures constant quality improvement in all facets of its operations.**

For each of these goals, CRC has identified objectives that further refine the goals. Beneath each objective are strategies that describe how CRC will leverage staff and resources to achieve the objectives and goals. For each strategy, activities have been identified which represent the day-to-day processes that CRC will carry out to enact the strategies. These goals, objectives, strategies, and activities are listed below.

Strategic Plan Detail

Goal I: CRC is widely recognized as the premier provider of timely, relevant, and unbiased research promoting informed public policy decision making.

- A) Objective: Provide unbiased research to promote informed public policy decision making.
 - 1) Strategy: Determine the salient, researchable public policy topics to pursue.
 - a) Activity: Annually develop a two-year “living” research agenda to guide general research program direction.
 - b) Activity: Develop a process to solicit input from board members, possible funders, and other stakeholders regarding proposed research topics.
 - 2) Strategy: Develop and document the procedures to protect CRC’s independence and nonpartisanship and to ensure research is unbiased.
 - a) Activity: Develop language for funding agreements that sets boundaries on the funder’s ability to influence content, project execution, and publication.
 - b) Activity: Develop written guidelines to describe the criteria for making policy recommendations in an unbiased nonpartisan manner.
 - c) Activity: Develop written guidelines and criteria to partner with other organizations.
- 3) Strategy: Develop best practices for research production.
 - a) Activity: Develop written standards for presentation of research, including formatting, citation method, etc.
 - b) Activity: Develop formal process for report development lifecycle (i.e., work plan, review process, webinar presentation, etc.).
- B) Objective: Maintain and expand CRC’s independent and nonpartisan reputation and stature.
 - 1) Strategy: Expand CRC’s visibility as a resource for unbiased, independent public policy information.
 - a) Activity: Research current visibility.
 - b) Activity: Prioritize untapped audiences.
 - c) Activity: Target untapped audiences for public relations outreach.
 - d) Activity: Develop public relations activities and materials for outreach.
 - e) Activity: Develop sustainable plan for periodic review and updates of CRC’s market reach.



Goal II: Michigan citizenry is more informed about public policy issues, alternatives, and implications and is more engaged in public policy discussions.

- A) Objective: Engage diverse audiences around the state in analyses and discussions of relevant public policy issues.
 - 1) Strategy: Proactively improve communications and engagement with current audiences.
 - a) Activity: Determine current profile and needs of CRC's audiences.
 - b) Activity: Create and update annually an outreach plan to communicate systematically with current audiences and to improve the effectiveness of that communication.
 - 2) Strategy: Proactively identify and develop new audiences across the state for educational outreach.
 - a) Activity: Outline a plan to reach and sustain new audiences that reflects political, racial, geographical and generational diversity.
 - b) Activity: Monitor anticipated and unanticipated outcomes.
 - c) Activity: Annually review and update outreach plan to reach new audiences.
- B) Objective: Deliver research findings through the most effective, cost-appropriate methods.
 - 1) Strategy: Identify and implement the most effective, cost-appropriate communication methods to deliver research to target audiences.
 - a) Activity: Develop multiple options and levels for research delivery.
 - b) Activity: Identify and prioritize audiences for each research project.
 - c) Activity: Develop a plan to proactively reach identified audiences for each research project.
 - d) Activity: Develop presentation templates, materials and resources.
 - e) Activity: Develop a network of organizations with whom CRC will communicate on an on-going, sustainable basis (e.g., media, public officials, school systems, universities).
 - f) Activity: Develop evaluation tools and benchmarks to gauge success in research delivery, including surveying audiences to determine current effectiveness and to solicit suggestions for improvement.
- 2) Strategy: Develop and use complementary communication and distribution channels to reach target audiences.
 - a) Activity: Determine which communication channels are appropriate and possible for CRC use (e.g., presentations, Internet, Public TV, social networking media, email, webinars).
 - b) Activity: Investigate the use of a media communications or public relations consultant to set up media channels.
 - c) Activity: Disseminate research findings through identified complementary communication channels



Goal III: CRC is a financially sustainable organization.

- A) Objective: Expand and diversify resource base to provide funding sufficient to support CRC operations.
 - 1) Strategy: Create and execute a plan to guide CRC's internal fundraising actions.
 - a) Activity: Investigate instituting a membership program.
 - b) Activity: Capture existing and new fundraising efforts into a calendar-based plan.
 - c) Activity: Assess total resources anticipated by funding type and set benchmarks that ensure diversified funding.
 - d) Activity: Identify, develop and implement targeted approaches and stewardship activities.
 - e) Activity: Identify and pursue opportunities for funding individual research projects.
 - 2) Strategy: Engage CRC's friends to expand funding base.
 - a) Activity: Develop and implement a plan to better engage directors, trustees, and other CRC friends in fundraising.
 - b) Activity: Develop and implement a plan to communicate CRC activities to directors, trustees, and other CRC friends.
 - c) Activity: Ensure that CRC delivers both content and engagement opportunities through its website, e-mails, and other research products.
- B) Objective: Steward resources carefully and responsibly to provide reliable information, enhance CRC's credibility, and ensure CRC's sustainability.
 - 1) Strategy: Execute a financial planning process that leads to a balanced budget.
 - a) Activity: Develop and follow an annual budget.
 - b) Activity: Monitor and track budget, using actual totals and estimates, as appropriate.
 - c) Activity: Consult multi-year research plan in identifying and pursuing funding opportunities.
 - d) Activity: Consult fundraising plan when assessing revenues.

- 2) Strategy: Steward CRC's funds carefully and responsibly.
 - a) Activity: Maintain strong internal controls.
 - b) Activity: Obtain an annual financial audit.
 - c) Activity: Make all required pension contributions.
 - d) Activity: Provide monthly financial updates to the board and staff.
 - e) Activity: Maintain complete and organized financial records.
 - f) Activity: Maintain complete and organized donor records.
 - g) Activity: Periodically evaluate expenditures to ensure cost effectiveness and appropriateness.
 - h) Activity: Periodically evaluate record keeping system.
- 3) Strategy: Implement policies and practices designed to ensure the long-term sustainability of CRC.
 - a) Activity: Build a contingency fund equal to at least three months of expenditures.
 - b) Activity: Develop multi-year budget projections based upon baseline revenue and spending trends.
 - c) Activity: Develop multiple budget scenarios using different assumptions.
 - d) Activity: Develop and follow a multi-year fundraising program to define multi-year campaigns, and use when designing annual fundraising plans.



Goal IV: CRC has the capacity to advance its mission.

- A) Objective: Develop and maintain the personnel and talent necessary to produce and communicate exemplary public policy research.
 - 1) Strategy: Develop and maintain a robust and highly skilled team.
 - a) Activity: Recruit, train, and mentor talented individuals who will advance the mission of CRC.
 - b) Activity: Identify key CRC activities and cross train staff in key tasks to ensure ongoing, uninterrupted operations.
 - c) Activity: Promote professional development and a personally and professionally rewarding work environment.
 - d) Activity: Develop and maintain relationships with other organizations that have public policy interests.
 - 2) Strategy: Identify current organizational skill gaps and develop and execute a plan for bridging gaps.
 - a) Activity: Determine skill gap and assess whether gap should be addressed through internal staff assistance or external service providers.
- B) Objective: Develop and maintain the quality and quantity of infrastructure to ensure production and dissemination of exemplary public policy research.
 - 1) Strategy: Secure and utilize all resources needed to create an exemplary work product.
 - a) Activity: CRC will take stock of, prioritize, purchase, and keep current:
 - (1) Appropriate hardware and software;
 - (2) Adequate work space and environment;
 - (3) Access to information sources;
 - (4) Phone and Internet systems;
 - (5) Website;
 - (6) Record retention space and procedures;
 - (7) Number and location of offices.

Goal V: CRC ensures constant quality improvement of all facets of operations.

- A) Objective: Routinely measure and evaluate the effectiveness of CRC's activities.
 - 1) Strategy: Develop and apply an appropriate system of metrics.
 - a) Activity: Compile listing of major CRC activities.
 - b) Activity: Develop appropriate qualitative and/or quantitative measures of success for each major activity.
 - c) Activity: Measure outcomes and report back to staff and board.
- B) Objective: Foster a culture of learning and continuous improvement.
 - 1) Strategy: Institute an annual review process for the organization.
 - a) Activity: Use CRC outcomes to assess the success and effectiveness of current practices.
 - b) Activity: Investigate alternatives to current practices.
 - c) Activity: Compile findings and recommended changes for upcoming years.

